

# **City of Portland Professional Employees Association (COPPEA)**

## **Professional Development Fund Plan Document**

### **Purpose**

The COPPEA Professional Development Fund (CPDF) is established by Article 23 of the COPPEA collective bargaining agreement (COPPEA CBA) between COPPEA and the City of Portland (City) effective July 1, 2013 through June 30, 2017 to promote professional development for COPPEA-represented employees.

### **CPDF Committee**

The COPPEA Professional Development Committee is established in accordance with Article 23 of the COPPEA CBA to review, approve and communicate funding requests for professional development as it pertains to an employee's current position, for another City position in their classification series, or in reasonably related work.

### **Plan Year Funding Availability**

CPDF funding is available on a plan year basis, based on fiscal year, as provided in Article 23 of the COPPEA CBA. Funding requests are accepted for eligible expenses only for the plan year in which the training or development will occur.

All training, seminars, conferences or other approved expenses must commence no later than June 30, 2017. Training, seminars or conferences can be completed after June 30, 2017 if started before that date.

### **Employee Eligibility**

The intent of the CPDF is to provide funding for eligible training and professional development expenses for COPPEA-represented employees who have passed their probationary period. Represented employees in their initial hire probation may submit Requests for Funding for review and approval by the Committee. However, reimbursement will not be paid until the probation period is successfully completed and all other requirements for reimbursement eligibility are met.

### **Training and Professional Development Eligibility**

CPDF funds may be used for:

- Fees and/or tuition to professional development seminars, classes, workshops and conferences.
- Books, tapes, videos/DVDs and software to assist the employee in his/her professional development. Items such as these remain the property of the City and must be turned over to the Bureau upon separation from the City.
- Licenses, certifications and professional dues not paid by the employee's bureau. A maximum of two state licenses or professional memberships are allowed for different licenses and/or professional memberships only. Reimbursement will not be approved for the same professional license held in multiple states (for example, requesting reimbursement for a PE License in both California and Oregon).

- Employees are encouraged to explore multiple funding sources (from both the Bureau and the CPDF) in circumstances where requested training is of direct benefit to the employee's Bureau.
- The CPDF is not to be used to pay for City-mandated training.
- The CPDF may not be used to purchase computer hardware or consumer electronics for personal use (for example, computers, software, PDAs, cell and/or smartphones, networking hardware, cameras and other similar equipment).
- Reimbursement is permitted for special event meals/banquets included with the fee/tuition of a conference or training seminar, if the event has a purpose that is reasonably related to the approved professional development (for example, a conference awards dinner, or a banquet with a conference keynote speaker).
- Effective July 1, 2013, the CPDF may no longer be used for travel expenses, including air transportation, car rental, mileage, per diem, hotel/motel cost or any other travel-related expenses. However, if a Bureau or the employee is paying for travel cost, the CPDF may be used to pay for out-of-town conference registration.
- Proof of attendance at classes, workshops, conferences and seminars is required. For classes, a copy of the grade report with a final passing grade is required; for a workshop, conference or seminar, a certificate of attendance or other document showing attendance is required.

### **Funding Maximums and Distribution**

Funding for the CPDF is limited. Eligible COPPEA-represented employees may request reimbursement up to the maximum amount each plan year. Employees will be reimbursed on a first come, first served basis. Employees will not be eligible for reimbursement when available funds have been exhausted. The Fund will be administered to ensure that all eligible employees have a reasonable opportunity to request and receive reimbursement of eligible expenses and that funds are available to be distributed on an equitable basis.

The CPDF has established a maximum reimbursement amount of \$1,500.00 per employee per plan year for the 4-year funding period, or until funds are exhausted. The maximum reimbursement amount will be reviewed and may be amended as necessary to appropriately administer the Fund. COPPEA-represented employees will be notified if the maximum reimbursement is changed. The maximum reimbursement is not a guarantee of reimbursement for any specific request. The CPDF does not establish a personal account for any individual employee.

### **Request for Funding Process**

To request funding, employees must submit a CPDF Request for Funding application form, along with supporting documentation that describes how the employee will benefit from requested funds.

- Employees must include information that lists the costs and timelines to complete training or attend seminars. Please specifically state when the training or class will begin and end.
- Employees are expected to complete CPDF approved training or attend seminars on their own time or have prior approval for time off (i.e. vacation leave, unless City-paid time is specifically approved by employee's supervisor). Under Article 23, release time to attend professional development needs shall be subject to approval by the City, which shall not be unreasonably denied when the training is directly related to the employee's City job. Supervisor approval is required on the Request for Funding application if the training is scheduled during the employee's normal work shift.
- Employees are expected to complete registration forms and other administrative requirements on their own time and in a timely manner. The CPDF Committee will not approve money to cover late fees.
- Where appropriate, employees should ask for bureau training funds prior to submitting a Request for Funding to the CPDF. For example, an employee request for bureau funding is encouraged if an employee is attending a professional conference directly related to the employee's current job. Failure to obtain bureau funds will not be used as a reason to deny a CPDF funding request.
- Information, including the Request for Funding application form, is available online at <http://www.portlandoregon.gov/bhr/62979>.
- The completed application, with signature(s) and supporting documentation as appropriate, should be submitted to the Bureau of Human Resources (BHR) by the employee. The documents may either be scanned and emailed to [HR – COPPEAProfDevFund@portlandoregon.gov](mailto:HR-COPPEAProfDevFund@portlandoregon.gov) or hard copies sent interoffice to BHR, 106/404, Attention: COPPEA Professional Development Fund.
- The CPDF Committee will review Requests for Funding for approval. The employee can expect a decision from the Committee approximately two weeks after receipt of a complete Request for Funding. Upon approval by the CPDF Committee, BHR will send a decision letter and Reimbursement Request form to the employee via email.
- Any request that is denied will also be communicated to the employee.

### **Committee Member Funding Requests**

If a CPDF Committee member is requesting funds, the COPPEA President or his/her delegate will replace the member for consideration of that funding request.

### **Reimbursement of Approved Requests Process**

Employees are required to use their own funds and will be reimbursed for eligible approved expenses after all receipts and documentation are submitted.

Once the receipts have been submitted they will be reviewed by the CPDF Committee. Employees should receive payment through the City's payroll system within 6 weeks after submitting a complete reimbursement request.

Reimbursement requests must be submitted as soon as possible after completion of the training or date of initial funding approval (e.g., for approved software, videos/DVDs or book purchases).

### **Administrative Procedures**

The City will maintain the tracking process for CPDF administration and will provide a quarterly report for the CPDF Committee, COPPEA President, and BHR Director to document how the CPDF is being administered. Administration of the CPDF will comply with all City administrative rules and accounting requirements.

### **Request for Appeal/Reconsideration**

If the CPDF Committee denies a request, or reimburses the employee for less than what was requested, and the employee is not satisfied with the explanation, the employee may write a letter to the committee requesting reconsideration of the decision. The committee will consider the employee's letter, and may choose to reverse or modify their initial decision, or authorize supplemental reimbursement if warranted. The employee also may review the committee's paperwork related to their request. The Committee's decision is final.

### **Taxability of Tuition Reimbursement**

Certain tuition reimbursements may be considered taxable income and reported on the employee's W-2 withholding form for the year the reimbursement is disbursed. According to Internal Revenue Code Section 127, the following reimbursed educational expenses are excludable from gross income:

- Education required by the employer or by law for the employee to keep his/her present salary, status, or job.
- Education that maintains or improves skills required to do the employee's present job duties.
- Payments received by an employee for tuition, fees, books, supplies under an employer's educational assistance program.

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### **Questions**

For questions, contact a member of the CPDF Committee. Committee member contact information is posted online at <http://www.portlandoregon.gov/bhr/62979>.