PROFESSION-TECHNICAL EMPLOYEES
Carryover Professional Development Pooling Procedures
Use Form B106 to apply for Pooled Funds

I. The Prof-Tech Memorandum of Understanding, Section 7, states that the District shall establish a Professional Improvement fund for Professional-Technical Employees in order to provide opportunities to improve or enhance job related skills and professional growth. This fund consists of individual allocations as outlined in the current MOU. Any unspent individual allocations are consolidated into a "Pool" that may be applied to beginning Dec. 1st on a first come, first served basis.

II. Human Resources manages the implementation of the MOU and the Business Services Department supervises the expenditure process.

A. All professional-technical employees will be notified of pooling procedures by viewing them in the Prof-Tech-Staff Portal site. They are posted to the Business Services and Prof-Tech sites. Prof-Tech leadership will notify the membership if updates to the procedure or B-106 forms are made.

B. Any prior year unspent individual allocations are consolidated into a pool that may be applied to on a first come, first served basis beginning Dec. 1st each year.

C. Current year unused pool funds are returned to the General Fund on August 31st.

D. The pool does not carry over, but is created every December based on the preceding fiscal year's balance. If an employee needs funds in excess of his/her annual allocation prior to December 1sr, he/she may request supervisor approval to borrow against his/her next year's allocation.

E. Once e pool is established, the pooled funds may be used by Professional-Technical employees under the same parameters established in the Memorandum of Understanding.

F. Up to a total $1500 may be requested from the pool by an individual.

G. Priority for use of pool funds will be given to professional development training between December Ist and April 3011 Pool applications for equipment to support professional development will only be considered after May 1st.

H. Requests for pool funds require a supervisor's signature. The supervisor signature can't be delegated.

I. Requests must be submitted using the B-106 "Prof-Tech Pooling Application" form. It is located in the Staff Portal-Business Services-Forms. Form must be printed so the supervisor can sign it.

J. The "Reason for applying to the Pool" section must be completed with sufficient detail for the Business Services staff to clearly understand how much money and what exactly is being requested. After the employee receives approval he/she can proceed with submitting the appropriate form for his/her development need, such as a B-100 Travel Request, B-150 Requisition or B-105 Reimbursement form. Attach a copy of the approved application torequest form.

K. An employee's account with a negative carryover at the end of a fiscal year will be eligible for funds remaining in the pool when such distribution of excess funds could be distributed to all employee accounts with a negative balance in equal amounts, and _the amount would not be less than $50.

ill. The Business Services department will:

A. Check to malce sure the applicant has exhausted his/her individual allocation prior to receiving and expending pool funds

B. Assign the appropriate account code to the employee's expenditure which will ensure the individual allocation is exhausted, then the remainder of funds needed, if any, are assigned to the pool, responsibility code 7028.

C. Return approved application for pool funds to employee, so that the employee may attach this documentation to the appropriate paperwork (B-150, B-105, etc.) Online requisitions must have a scanned copy of the approved B-106 attached. All Procurement Card and Department Checkbook policies apply.