

# IPDA FAQ

- IPDA created upon hire, prorated by FTE and according to the number of full calendar months remaining in the fiscal year from date of hire.
- Cognos report F0052 tracks IPDA balances, and is only as accurate as data that has been entered in banner, still potential to overspend/deny use based on balance in banner if not reconciled with all approved request forms.
- If employment is not conditioned on the completion of a trial service period (Example: Academic Professionals), the employee will have access to the IPDA funds from date of hire.
- If continued employment is conditioned upon completion of a trial service provided by Art 17, section 5, the AP will not be able to access their IPDA funds until they have successfully completed their trial service.
- AAUP CBA, Article 19, Section 3: Funded 9/30 of the FISCAL YEAR, prorated by FTE as follows:
  - TTF \$1,100
  - NTTF \$600
  - AP \$500
- For continuing employees, funds will be available for use on July 1 of each fiscal year.
- Members can receive reimbursement for funds spent between July 1 and September 30.
  - Meaning that 9 month employees that are off contract July 1 - September 30 still have access to their IPDA funds during that time (same as 12 month employees). Whether they charge the IPDA directly or request a reimbursement depends on the request.
- For new employees, funds rollover for four fiscal years.
- Funds expire at the end of four fiscal years.
  - For those AAUP members who are approaching their 4<sup>th</sup> year for the first time, we encourage you to reach out to them to remind them of the CBA language regarding Unspent Faculty Development Funds, (Article 19, Section 3(g)).
  - Funds not used after four years may roll over for a longer period of time, upon good cause shown and upon request of the member and approval of the Dean or their designee.
  - For those AAUP members who are at or beyond 4 years, and who do not request continued access, at the end of each fiscal year unused funds revert, (First dollar in First Out) revert to an account within the relevant college, school or other University unit and be used by the Dean for other professional development-related purposes.
    - AAUP members should make requests for continued access to funds that are scheduled to expire: no later than May 1, [year], or next business day.
    - Dean's approval in writing to the member: June 15, [year], or next business day.
    - Dean notice to fiscal officer of 1-year extension approval: August 1, [year]
    - Extension will be approved in one Fiscal Year increments: June 30, [year]
  - For those AAUP members who separate from the university, any unused IPDA funds revert to an account within the relevant college, school or other University unit and be used by the Dean for other professional development-related purposes.
- If the Dean chooses to use reverted/expired funds they must report that use to OAA Academic Labor Relations Team at the end of each fiscal year (no later than August 1).
- AAUP members retain access to their IPDA accounts over the summer even when 9-month employees
- IPDA Funds are not to be used for course buyouts.

- OAA with the full support of your deans has determined that chairs/chair equivalents be given the same professional development opportunities as their union represented peers and that IPDAs be established for those who serve in these roles.
- Add link to [Budget Office IPDA JV training](#)
- SFO Order of Operations:
  - Carryforward all remaining balances during carryforward process
  - New annual allocations by September 30, [year]
  - Revert expired funds from prior year
  - Notice to Dean/Supervisor of scheduled to expire funds
  - Courtesy notice to members (if desired) of scheduled to expire funds

## **AAUP CBA, Article 19, section 3 (e):**

- The amount credited to an IPDA for a member who is less than 1.0 FTE will be prorated based on the member's FTE that corresponds to the FTE in their appointment letter and the variable appointment FTE thresholds shown below. However, an approved sabbatical leave will not result in proration of the IPDA credit.
- For members on variable FTE appointments, the IPDA will be prorated as follows:
  - .5-.74 FTE—75% of IPDA amount
  - .75 or above FTE—100% of IPDA amount
- If the variable appointment letter specifies the FTE is between 0.5 to 1.0 FTE, then 0.75 FTE will be used to calculate the member's IPDA amount. If the actual FTE the member worked over the course of the year is less than .75, their IPDA allotment for the subsequent year will be reduced to 75% of their award. If the member leaves the University, they will not be charged for any IPDA funds spent in excess of their actual FTE.

## **AAUP MOU - 2022Oct15Expanded Usage of IPDAs**

Article 19 (Professional Development and Support), Section 3 (Individual Professional Development Account (IPDA) Program), paragraph (f) is amended to read as follows:

(f) A member may use funds in an IPDA for activities that support the job-related professional development of the member. Examples of such uses could include, but are not limited to: travel for the presentation of scholarly work, conference fees and travel, professional organization fees, professional licensure or certification requirements, acquisition of specialized equipment (such as laboratory or art supplies), procurement of professional services through independent contractors or vendors (such as scanning, 3-D printing, transcription, or translation), tuition and/or fees, subscriptions and books, submission fees, and relevant training and continuing education opportunities. IPDA funds may also be used to acquire computers and associated peripherals (external devices like specialized keyboard or monitor) used to advance the specific professional development activity and to hire hourly student employees who provide administrative, clerical, labor, technical, or other general support that advances the professional development activity.

The use of IPDA funds is subject to the pre-approval of the member's supervisor and to all applicable University policies and procedures regarding the appropriate use, procurement, and documentation of University expenditures. Per University policies, any property purchased with the use of IPDA funds is property of the University and must be purchased and maintained in accordance with those policies. Use of IPDA funds is also subject to all employment policies and procedures if a student employee is hired to assist with a member's professional development activity.