

GUIDE TO Professional Development Fund

Guidelines to be used in conjunction with Policy PL290

Guideline Owner: Director, People and Culture

Keywords: Professional Development, PD Fund, Academic Career Development Fellows

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1. INTENT

The purpose of these Guidelines is to outline requirements and procedures regarding Edith Cowan University's (the University) Professional Development Fund.

2. ORGANISATIONAL SCOPE

These guidelines apply to all University Professional Employees and Academic Career Development Fellows.

3. DEFINITIONS

The [University Glossary](#) and the following definitions apply to this policy:

TERM	DEFINITION
Academic Career Development Fellow	An employee appointed to an Academic Career Development Fellow fixed-term contract as set out within the Industrial Instrument.
Industrial Instrument	Edith Cowan University (ECU) Enterprise Agreement 2017 or successive versions.
Management for Performance	The University's performance cycle, planning and review process
Professional Development Fund or Funding	Funding contribution provided by the University to support professional development activities as set out within the Industrial Instrument.
Professional Employee	means an employee employed by the University in the classifications listed in Schedule 2, Part 1 of the Industrial Instrument

4. GUIDELINES CONTENT

4.1 Principles and Guidelines

- 4.1.1 The ECU PD Fund provides eligible Professional Staff and Academic Career Development Fellows an opportunity to apply for up to \$5,000 to support an individual's career development.
- 4.1.2 Funding is available for professional career development activities aligned to university strategic and business needs and personal professional aspirations and is administered by People and Culture.
- 4.1.3 PD Funding is available for relevant professional development activities aligned to The University's strategic and business needs.
- 4.1.4 Applications to access the PD Fund will be assessed according to eligibility, the PD fund principles, criteria and merit in alignment with The University's strategic priorities and the employee's work.
- 4.1.5 The PD Fund will support development opportunities identified as objectives arising from participation in Management for Performance discussions.
- 4.1.6 The PD Fund will not support development activities and programs that are substantially equivalent to those already offered by the University as part of its professional development offerings.
- 4.1.7 During selection the University will consider the total professional development contribution already provided to the employee by the University, including any previous successful PD Fund applications.
- 4.1.8 The JSCC will monitor the number of applications and nature of awards on an annual basis and be consulted on any changes to the assessment criteria.

4.2 Who is Eligible to Apply (criteria)?

- 4.2.1 A Professional Employee will be considered eligible to apply for PD funding:
 - a) After 12 months continuous service with The University.
 - b) If performance over the previous year has been assessed as at least satisfactory.
 - c) After a 2 year period from the date a previous successful PD Funding was granted.
 - d) If their line manager confirms the application is consistent with a career plan discussed as part of the Management for Performance process.
 - e) Where the professional development activity has a direct relevance and benefit to their existing or near future possible career at The University, and leads to a demonstrable contribution to the work and productivity of The University.
 - f) If the application has the endorsement of the relevant line manager and relevant Line Executive.
- 4.2.2 An Academic Career Development Fellow will be considered eligible to apply for PD funding:
 - a) Within the first 12 months of their appointment.

- b) Where their line manager confirms the activity is consistent with objectives identified within the employee's Management for Performance.

4.3 What development activities are eligible for funding?

PD Funding may be provided for the following development activities:

- 4.3.1 Accredited courses offered by a Higher Education Provider or Registered Training Organisation;
- 4.3.2 Professional development courses/programs offered by professional institutions or accredited private providers;
- 4.3.3 Conferences/Seminars/Workshops that provide a clear demonstrable outcome and cost/benefit; and
- 4.3.4 Mentoring/Coaching assistance formally required for employees that have exhausted the JLP mentoring system and arranged by the relevant line manager as part of the outcomes from the Management for Performance discussions.

4.4 What can be covered by the funding?

The PD Fund only covers costs, or partial costs, related to:

- 4.4.1 Approved Registration and/or course fees, excluding incidental or amenities fees;
- 4.4.2 Travel and accommodation for approved conferences or courses;
- 4.4.3 Prescribed study material (e.g. text books) for the approved event;
- 4.4.4 Professional facilitation/coaching/mentoring fees;
- 4.4.5 Approved expenses by the shadowing/secondment host; or
- 4.4.6 Other costs as deemed appropriate

4.5 FBT application in respect of Professional Development

- 4.5.1 Guidance can be obtained from the FBSC Taxation Team – tax@ecu.edu.au.
- 4.5.2 Examples of PD events that would attract FBT (accurate at time of publishing):

A legal officer takes a six-month pre-admission course at the College of Law, which would allow him to be admitted as a solicitor. This is regarded as a higher qualification, which does not necessarily relate to the performance of the employee's current duties nor would lead to an increase in earnings in the employee's current job and the course costs would attract FBT.

A trainee accountant is studying an undergraduate commerce degree part-time at university. His course costs are Commonwealth Supported. Even though this course enables the employee to maintain or increase the specific knowledge required in his current position and to carry out his duties more effectively, the course costs would attract FBT because the course costs fall under the HECS-HELP scheme and HECS-HELP scheme course costs will always attract FBT.

Examples of PD events that would not attract FBT (accurate at time of publishing):

An employee took a management course at a TAFE college to assist them to cope with new managerial responsibilities assumed as the result of a promotion. The course costs would not attract FBT as the course assists the employee to better perform the employee's current duties.

Fees for an accountant's CPA qualification would not attract FBT. The professional qualification allows the accountant to maintain or increase specific knowledge required in their role as an accountant.

4.6 Assessment Criteria

Applications will be assessed according to the following criteria:

- 4.6.1 Extent to which the application meets the individual's personal career plan;
- 4.6.2 Demonstrated satisfactory performance as assessed and documented as part of the Management for Performance System;
- 4.6.3 Alignment with The University's strategic priorities and their work;
- 4.6.4 The cost of the course or program;
- 4.6.5 Availability of alternatives;
- 4.6.6 FBT implications of the application; and
- 4.6.7 Availability of funding.

4.7 Conditions of Funding

- 4.7.1 Pre-approval: Funding must be approved before the development activity is attempted.
- 4.7.2 Funding will be based on the principle that the person enrolled is self-funded or sponsored by the business area and will be reimbursed with the approved funds upon proof of successful completion of the approved activity.
- 4.7.3 Payments for a course of study that will lead to a degree, certification or qualification will only be made upon receipt of proof of payment and proof of successful completion.
- 4.7.4 The successful applicant's Business Unit will advance payments for other, non-qualification, developmental activities. Reimbursement to the Business Unit will be made upon receipt of proof of payment and proof of successful completion.
- 4.7.5 An applicant holding a scholarship/award, which provides payment of fees, may only apply for PD Fund related expenses not met by the scholarship or award.
- 4.7.6 An employee, sponsored by the business area, may be required to reimburse the University for all or part (pro rata) of the allocated PD Funding should they not attend and/or complete the approved professional development activity as scheduled, within the prescribed timeframe or terminate their services from The University within 12 months from completing the course.

4.8 Applications for the Professional Development Fund

- 4.8.1 Details of the PD Fund application process can be found at:
<https://intranet.ecu.edu.au/staff/centres/human-resources-service/our->

[services/performance-recognition-and-career-development/professional-staff-career-development-fund](#)

- 4.8.2 Applications are open all year round.
- 4.8.3 Applications will be assessed and ranked on merit, based upon the assessment criteria and principles;
- 4.8.4 Applicants will be informed of the outcomes of their applications via email; and
- 4.8.5 Unsuccessful applicants are eligible to resubmit applications at any time.

4.9 How will the Professional Development Fund be disbursed?

- 4.9.1 Claims for reimbursement should be submitted as soon as practicable after completion of the Professional Development activity.
- 4.9.2 Reimbursements of approved funds will be available up to 12 months from the date of approval in accordance with completion dates of PD activities.
- 4.9.3 Any taxation incurred by The University in relation to activities and expenses will be reduced from the amount dispersed to an individual accordingly.
- 4.9.4 Successful applicants receive approval of a contribution towards the cost of an approved professional development activity up to a maximum amount of \$5,000 per person, subject to availability of funds.
- 4.9.5 Only approved actual costs, or partial costs, related to the approved PD activity, as described in this PD Fund Guide will be reimbursed upon submission of the following documents to People and Culture (pdfund@ecu.edu.au):
 - 1. Proof of Completion (if appropriate);
 - 2. Tax Invoice/s, receipts and foreign currency conversion documents.
 - 3. Proof of payment if the invoice provided does not show a nil balance owing: i.e a merchant receipt, Eftpos receipt, payment confirmation or bank statement showing the charge (ensure personal information is blanked out).
 - 4. [100% Business Use Declaration](#), available in the Finance Forms Kiosk – Taxation page, if not previously provided.
 - 5. **If payment was made by the individual:** Completed and signed Payment Request for Reimbursement Form available from the [Finance Forms Kiosk – Accounts Payable](#) page;OR
 - If payment was made by the School/Centre:** Provide a flexi field code (e.g. 84000.1400.xxxx.SA.06.01) where the reimbursement should be journaled and name of the Business Manager for your area.

5. ACCOUNTABILITIES AND RESPONSIBILITIES

In relation to these guidelines, the following positions are responsible for the following

Guidelines Owner

The Director, People and Culture, is the Guidelines Owner and has overall responsibility for the content of these guidelines and its operation in The University.

The Manager, Workforce Strategy and Capability is responsible for currency of information and provision of advice relating to operationalising this policy.

Staff and Academic Career Development Fellows are required to comply with the content of these guidelines and to seek guidance in the event of uncertainty as to its application.

6. RELATED DOCUMENTS:

Legislation

Relevant Industrial Agreements

Policies

[Management for Performance System \(MPS\) Policy](#)

[Staff Code of Conduct](#)

Operational documents and resources

[Professional Development Fund Application Form](#)

7. CONTACT INFORMATION

For queries relating to this document please contact:

Guidelines Owner	Director, People and Culture
All Enquiries Contact:	Manager, Workforce Strategy and Capability
Telephone:	08 6304 6834
Email address:	pdfund@ecu.edu.au

8. APPROVAL HISTORY

Guidelines Approved by:	Director, People and Culture
Date Guidelines First Approved:	
Date last modified:	June 2021
Revision History:	<p>June 2021 – Guidelines were reviewed and updated to reflect the current organisation structure and process, align content with the updated Professional Development Fund Policy and using the current Guidelines template.</p> <p>May 2023 – references to Human Resources were updated to People and Culture.</p>
Next Revision Due:	June 2024
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