ECU Professional Development Fund (PD Fund) Guide 2019

Principles and Guidelines

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.

Funding is available for professional career development activities aligned to university strategic and business needs and personal professional aspirations and is administered by Human Resources Services.

1. Principles

- PD Funding is available for relevant professional development activities aligned to ECU’s strategic and business needs.
- Applications to access the PD Fund will be assessed according to eligibility, the PD fund principles, criteria and merit in alignment with ECU’s strategic priorities and the employee’s work.
- The PD Fund will support development opportunities identified as objectives arising from participation in Management for Performance discussions.
- The PD Fund will not support development activities and programs that are substantially equivalent to those already offered through the HR Organisational Development team including LinkedIn learning (Lynda.com) courses or any other online opportunities ECU is licensed for, CLT, GRS, ORI or any other ECU Professional Services.
- 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.
- 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.

2. Who is eligible (criteria)?

A Professional Staff employee will be considered eligible to apply for PD funding:

- After 12 months continuous service with ECU.
- If performance over the previous year has been assessed as at least satisfactory.
- After a 2 year period from the date a previous successful PD Funding was granted, a PD Fund recipient may reapply for further funding.
- If their line manager confirms the application is consistent with a career plan discussed as part of the Management for Performance process.
- Where the professional development activity has a direct relevance and benefit to their existing or near future possible career at ECU, and leads to a demonstrable contribution to the work and productivity of ECU.
- If the application has the endorsement of the relevant line manager and Relevant Line executive.
An ECU Academic Career Development Fellow will be considered eligible to apply for PD funding:

- At any time during their appointment.
- Where their line manager confirms the activity is consistent with objectives identified within the employee’s Management for Performance.

3. **What development activities are eligible for funding?**

PD Funding may be provided for the following development activities:

- Accredited courses offered by a Higher Education Provider or Registered Training Organisation;
- Professional development courses/programs offered by professional institutions or accredited private providers;
- Conferences/Seminars/Workshops that provide a clear demonstrable outcome and cost/benefit; and
- 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. **What can be covered by the funding?**

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

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

5. **FBT application in respect of Professional Development**

*Examples of PD events that would attract FBT (these examples are accurate at the 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.
Additional guidance can be obtained from the FBSC Taxation team.

6. Assessment Criteria

Applications will be assessed according to the following criteria:

- Extent to which the application meets the individual’s personal career plan;
- Demonstrated satisfactory performance as assessed and documented as part of the Management for Performance System;
- Alignment with ECU’s strategic priorities and their work;
- The cost of the course or program;
- Availability of alternatives;
- FBT implications of the application; and
- Availability of funding.

7. Conditions of funding

- Pre-approval: Funding must be approved before the development activity is attempted.
- 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.
- 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.
- 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.
- An applicant holding a scholarship/award, which provides payment of fees, may only apply for PDF related expenses not met by the scholarship or award.
- An employee, sponsored by the business area, will be required to sign a declaration of reimbursement to 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 ECU within 12 months from completing the course.
8. **Applications for the Professional Development Fund**

Details of the PD Fund application process can be found at:

http://intranet.ecu.edu.au/learning/professional-development/professional-development-fund

- A call for applications will be made at least twice a year.
- Applications will be assessed and ranked on merit, based upon the assessment criteria and principles;
- Applicants will be informed of the outcomes of their applications via email; and
- Unsuccessful applicants are eligible to resubmit applications in any subsequent round.

9. **How will the Professional Development Fund be disbursed?**

- Reimbursements will only be available in the financial year for which the professional development initiative was approved.
- Any taxation incurred by ECU in relation to activities and expenses will be reduced from the amount dispersed to an individual accordingly.
- 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.
- Only approved costs, or partial costs, related to the approved PD activity, as described in this PD Fund Guide will be reimbursed.

Successful applicants undertaking a course of study that leads to a degree, certification or qualification will be reimbursed the actual cost of the approved career development activity (to a max of $5000), in agreement with the award letter, upon submission of the following documents to CLT:

- Tax Invoice/s;
- Proof of completion; and
- Payment Request form.

For any other form of development activities the successful applicant’s payment will be advanced by their Business Unit. The Business Unit will be reimbursed upon submission of the following documents to CLT:

- Tax Invoice/s;
- Proof of completion; and
- A flexfield (e.g. 84000.1400.xxxx.SA.06.01) on where the fund will be transferred.

General enquiries should be submitted to: od@ecu.edu.au.