

Guidelines for Professional Development Funds Usage, 2023-24

Professional Development Funds (PDF): These are intended for specific activities outlined below. They are available for qualified tenure-track, tenured, and select lecturer faculty. Lecturer faculty on 1.0 appointment (time base not to be combined with other colleges/campuses) are also eligible for PDF depending upon their AACSB Status. Faculty can receive their current PDF balance information from the Department Chair and/or department office. All expenses MUST be pre-approved. The PDF policies are also guided by CSU EO 1054, which supports AACSB accreditation and is the primary source for PDF.

- (a) To provide greater spending flexibility, LFCoB introduced the “use it or lose it” policy starting the academic year 2020-2021. According to this, there is a no carryforward policy on PDFs that eligible faculty receive in an academic year. For the current year (2023-2024), the allocations are as follows:
- Tenure-track eligible faculty, \$3,000 (use it or lose it). No access to the accumulative balances.
 - SA-Tenured faculty, \$2,400 (use it or lose it). An additional \$600 from accumulated balances.
 - PA-tenured faculty, \$1,200 (use it or lose it). An additional \$600 from accumulated balances.
 - Non-SA/PA (Additional) Tenured faculty, \$600 (use it or lose it). An additional \$600 from accumulated balances.
 - 1.0 LFCoB time-based lecturer faculty (not combined with other colleges or other CSU campuses) in SP or IP, \$1,200 (use it or lose it). An additional \$600 from accumulated balances.
 - 1.0 LFCoB time-based lecturer faculty (not combined with other colleges or other CSU campuses) who are in Additional Status, \$600 (use it or lose it). An additional \$600 from accumulated balances.
- (b) All prior accumulations in faculty member’s PDF “account” will remain as long as they are employed at SF State and will not be subject to use-it-or-lose-it rules. However, each year the college will determine how much of that previously accumulated amount can be withdrawn. All faculty will have access for up to \$600 from their past accumulated balances for AY 2023-2024. All current PDF usage guidelines apply to prior accumulations.

The major changes to the PD funds usage for this academic year 2023-2024 and to be continued from 2022-2023 are the following:

1. As in-person travel is permitted for attending conferences, please see the section on peer-reviewed conference presentations for details.
2. Purchasing books for teaching purposes (with a limit of up to \$500) is approved.
3. Under the “Additional Usage guidelines,” for the Technology related purchase reimbursement up to \$300, the purchase of these additional items is permitted: Microphone, camera, extra power adapters for computers, backup battery for computers, mouse, headphones, an extra monitor (e.g., large screen monitor) and other related items.
4. Under the “Additional Usage guidelines,” PD funds of up to \$750 per semester are now allowed for hiring student assistants for the facilitation, completion, and grading of homework assignments, quizzes, and exams.
5. Faculty can travel for more than one international trip within their available PD Funds.

Prior Usage guidelines

The document is categorized into the following subsections:

- 1) Peer-Reviewed Conference Presentations
- 2) Direct Research Expenses
- 3) Indirect Research Expenses

We now present each of these sections in detail:

Table 1: Peer-Reviewed Conference Presentations

Both Domestic and International Conference Presentations this academic year (2023-2024) can be virtual or in-person and physical travel is permitted. Faculty Travel award from Faculty Affairs and Professional Development is available at the University level this academic year.

Activity	Conditions	Level of Approval	Limitations	Permissible/Negotiable
1. Domestic Conference	Faculty participation that aids publication efforts	Chair, Dean	See note 1 below	Permissible (the faculty is presenting a paper).
2. International Conference	Faculty participation that aids publication efforts	Chair, Dean, Dept. Funds or President's approval.	See note 2 below	Permissible (the faculty is presenting a paper).

There is a limit of two conference presentations per fiscal year. The two conferences can be domestic or international.

1. **For Domestic conferences,** The maximum amount of PDF available for domestic conferences is \$3,000.

Peer-reviewed poster presentations are permitted only domestically (within the United States). *Domestic travel is permitted only to those states not on the restricted list of the State of California.*

Travel to Banned States:

When you identify conferences, please be aware that pursuant to AB 1887, CA prohibits using state funds to travel to 23 states (subject to change). Please review the legislation and list of banned states at the link below. Since PDF is funded through the general fund, the college can only use UCORP (donor funds) to travel to the banned states (this includes not just airline and lodging but also conference registration and other related expenses). Therefore, please avoid traveling to conferences in these states as far as possible. For this year, the college will permit the use of UCORP money to partially defray the cost of such conference travel (limited to one conference per year). Faculty may use \$1,000 (debited from their total allowable PDF) to travel to banned states, and departments may use their UCORP money to defray additional costs. This policy tries to balance the need to support the anti-discrimination measure and the challenge that many important conferences may be held in these banned states. Also, the college needs to preserve precious UCORP dollars. <https://oag.ca.gov/ab1887>,

2. **For International conferences**, The total amount of funds available to support international conferences is \$3,000, if the faculty member has these funds available in his/her account for the academic year 2023-2024. Travel to Canada and Mexico is considered International Travel by the University Policy.
3. **Per diem** expenses per university guidelines are permitted from PDF for the academic year 2023-2024.
4. **Virtual conferences** (domestic, international) and virtual peer-reviewed poster presentations (within the United States) are permitted. We anticipate the amount spent for virtual conference presentations to be much lower than before, as air and hotel expenses are not incurred.

Table 2: Direct Research Expenses

Activity	Conditions	Level of Approval	Limitations	Permissible/Negotiable
1. Purchasing software	Research purposes	Chair, Dean	Not for teaching	Permissible
2. Purchasing enhanced computer technology	A supplement to the refresh option, extra funds needed	Chair, Dean	For demanding research purposes	Negotiable Non-Negotiable: Printers, Toners
3. Purchasing databases	Large datasets required	Chair, Dean	For research purposes	Permissible & Negotiable
4. Research-related costs: transcription, editing, surveys, data collection, paying participants in experiments, etc.	Linked to potential academic publications and presentations.	Chair, Dean	Large amounts open for negotiation on a case-by-case basis.	Permissible & Negotiable
5. Student Assistant to support research	Statement of assignment	Chair, Dean	Not teaching assistants. See Additional Usage Guideline in page 5 for student assistants to support teaching.	Permissible up to the annual PDF limit

For activities 1 through 4 listed in Table 2, there will be a limitation based on the type of purchase.

Table 3: Indirect Research Expenses

Activity	Conditions	Level of Approval	Limitations	Permissible/Negotia
1. Purchasing books	For research and/or teaching	Chair	Up to \$500	Permissible
2. Buying periodicals (non-library)	Not available otherwise	Chair	Academic research	Permissible
3. Professional Association Membership Fees	Required for conferences professional development	Chair	Academic in nature; three per year.	Permissible

4. Journal submission Fees	Peer Reviewed Journals	Chair	Three per year	Permissible
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For activities 1 through 4 in Table 3, there will be a limitation based on the type of purchase. *Upon permanent departure from the University, all physical assets purchased with PD Funds should be returned to the University.

Please contact the Department Chair for details on the usage of funds for all activities discussed in this document.

Additional Usage guidelines

- ▶ More than two peer-reviewed conferences per year with accepted papers or presentations are allowed.
- ▶ Up to \$500 allowed to attend professional/industrial/practitioner conferences.
- ▶ Allow up to an annual cap for continuing education. Following this, the faculty are required to give a workshop to the college in a seminar forum or offer classes based on their learnings in their classes.
- ▶ The number of reimbursable professional memberships increases from 1 to 3.
- ▶ Reimbursement for workshops bundled with conferences is allowed.
- ▶ Reimbursement for attending conferences where faculty have other formal roles such as program committee, track chair, session chair, and discussant is allowed.
- ▶ Reimbursement is allowed for up to \$750 for invited talks with formal letters of invitation at other universities.
- ▶ Technology-related purchase reimbursement up to \$300 related to research such as hard drives and parts to keep computers up to date, is allowed. No reimbursement for printers/toners etc. PD funds may also be utilized to upgrade the computer during a 4-year refresh. The \$300 cap does not apply when upgrading the computer during refresh but overall PDF caps will apply. Furthermore, the \$300 can be used to purchase the following: Microphone, camera, extra power adapters for computers, backup battery for computers, mouse, headphones, an extra monitor (e.g., large screen monitor), and other related items.
- ▶ PD funds for up to \$750 per semester are now allowed for hiring Student Assistants, for the facilitation, completion and grading of homework assignments, quizzes, and exams. These cannot be used for helping instructors with teaching classes or holding office hours. The student assistant hired should be well-qualified (e.g., Students in the Master programs or UG students in the major concentration of the course or UG students with high GPA). The hiring of the student assistants by faculty needs approval of the department chair and hence the above criteria for hiring are stated in the relevant hiring forms. The policy for hiring student assistant to support research can be found in **Table 2: Direct Research Expenses** on page 3.