

PROFESSIONAL DEVELOPMENT POLICY
OHIO WESLEYAN UNIVERSITY
March 15, 2021

Ohio Wesleyan University provides each full-time member of the faculty with an individual professional development account (IPDA). The funds in each IPDA are intended to support the professional development of each faculty member throughout their career. The institution annually makes available \$1,250 for deposit in each IPDA. This is called the annual allotment. Funds carry over from year to year. Faculty may use these funds at their discretion without application or prior approval.¹ IPDA balances for retiring faculty are returned to the University.

Individual Accounts

Each faculty member is provided with a unique account number associated with the professional development funds allocated for her or his use. This makes it easier for faculty to manage and use the funds. It minimizes the number of requests and approvals required to make a purchase, and it makes it possible to see all transactions and the balance within [Management Reporter](#), which permits faculty to manage their IPDA funds. Details about charging expenses to IPDA funds can be found in the [Frequently Asked Questions \(FAQs\)](#)

Allowed Expenses

The Faculty Handbook describes in [Chapter VI, Section C](#) four categories of financial assistance available to full-time faculty for travel and other professional expenses. Through IPDA accounts, the University allows these and additional expenses in support of faculty professional development as described in the [Frequently Asked Questions \(FAQs\)](#). The University has extended the benefits stated in the Faculty Handbook because it is committed to the continued development of its faculty.

Limitations

Purchases made with IPDA funds constitute an employee benefit. To ensure that the University remains in compliance with IRS regulations for non-taxable benefits, certain limitations on the use of the funds apply. Additional limitations exist to help ensure that institutional resources are used in a responsible and non-duplicative manner. Finally, limitations exist because IPDA funds are not personal funds; they are institutional funds intended to benefit the institution by enabling professional activities of the faculty member. Details about limitations on the use of IPDA funds can be found in the [Frequently Asked Questions \(FAQs\)](#).

Extension to Part-Time Faculty

The Faculty Handbook specifies in Chapter III, Section C.2 that part-time faculty are eligible for professional development on a per-course basis once they have completed teaching eight (8) full-unit courses. The current professional development rate for part-time faculty is \$200 per course. Once a part-time faculty member is eligible for professional development, the distribution and management of funds will follow this policy.

¹ If a faculty member plans to spend \$5,000 or more from their IPDA in a single fiscal year, they should contact the Associate Provost to ensure fund availability. Expenses for doctoral tuition costs should be discussed before being incurred so that Academic Affairs can help a faculty member navigate potential complications related to IRS regulations.

PROFESSIONAL DEVELOPMENT POLICY FREQUENTLY ASKED QUESTIONS

How Do I Access IPDA Funds?

The recommended way to access IPDA funds is to make a purchase using Ohio Wesleyan's e-procurement system, [BishopBuy](#). Within this system, faculty can charge purchases to their unique IPDA number. For information about using BishopBuy, please see the [BishopBuy website maintained by Business Affairs](#). There you will find quick guides for [shopping](#) and [submitting an order](#) as well as video tutorials on [purchasing from Amazon](#), [making a check request](#), and [creating a requisition](#) in BishopBuy. When a catalog supplier is available through BishopBuy, faculty must use BishopBuy to make a purchase from that catalog supplier. For example, Amazon is available in BishopBuy. Accordingly, faculty must place orders for items from Amazon through BishopBuy.

If an item is not available through a BishopBuy catalog supplier, faculty can submit a [non-catalog requisition through BishopBuy](#). In the rare case in which BishopBuy is not a possibility, a university procurement card may be used. The expense should then be [allocated in Concur](#) to the unique account number associated with the faculty member's IPDA. Faculty must follow all [procurement card policies](#) and all University purchasing policies when making purchases by p-card.

What are the Allowed Expenses for IPDA Funds?

- Registration fees to attend conventions, conferences, and workshops.
- Transportation costs to attend conventions, conferences, and workshops. Expenses are limited to the cost of coach airfare. All [university travel policies](#) must be followed. All travel arrangements must be made through the University-selected travel agency as posted on the [Purchasing Travel & Expense website](#).
- Lodging and meal expenses while attending conventions, conferences, and workshops. All [university travel policies](#) must be followed.
- Travel to sites where faculty will work during a paid regular, fourth year, or scholarly leave. All [university travel policies](#) must be followed. All travel arrangements must be made through the University-selected travel agency as posted on the [Purchasing Travel & Expense website](#).
- Expenses associated with preparing scholarly or creative work for publication, display, or performance.
- Out-of-pocket expenses for scholarly or creative work supplies.
- Books for use in the classroom, teaching, scholarship, or creative work. See the [limitations FAQ](#) for detail.
- iPad or other tablet computing device for use in teaching or research.
- Software and services related to teaching or scholarship for which the institution does not already provide an institutional license. See the [limitations FAQ](#) for detail.
- Equipment or supplies for a studio or lab. See the [limitations FAQ](#) for detail.
- Membership fees for professional organizations directly related to the faculty member's work at the University.
- Fees to maintain professional licensure.

- Expenses related to skill development or training associated with a faculty member's teaching, scholarship, or creative activities.
- Student worker salary for work related to scholarly or creative projects. Approval is required.
- Tuition costs for doctoral studies. Limits may be set on the amount of IPDA funds that can be spent on doctoral tuition to comply with IRS regulations. Approval is required. Please seek input from the Associate Provost before incurring any expenses.

What are the Limitations on the Use of IPDA Funds?

- Purchases to be charged to an IPDA should be made through [BishopBuy](#) or with a university procurement card. When a catalog supplier is available through BishopBuy, faculty must use BishopBuy to make a purchase from that supplier. For example, purchases from Amazon must be made through BishopBuy. Making a purchase through BishopBuy ensures that the institution receives the lowest price and that sales tax is not charged. This helps ensure compliance with IRS-accountable standards and avoids the need for faculty members to write and submit separate expense reports or to clear transactions in Concur.
- IPDA funds may not be used for unauthorized transactions such as those in the University [procurement card policy](#). Unauthorized transactions will be sent back to faculty for reimbursement to the institution. Unauthorized transactions include those for: cell phones, monthly cell phone service, monthly internet service, phone cards, controlled substances, donations, fines, penalties, gambling, gift cards, alcohol, guns, weapons, ammunition, explosives, hazardous chemicals, illegal transactions, internet connectivity, personal items, services, or expenses.
- Ohio Wesleyan is a tax-exempt organization and is therefore not subject to most federal and state taxes. Because of this, IPDA funds cannot be used to pay state sales tax when the vendor is located in one of the states in which OWU is exempt. Please see the [Purchasing website titled Tax-Exempt Forms](#) for a list of states in which we are exempt from sales tax. When making purchases originating in these states, please be sure to use the downloadable forms provided on this website to exempt the purchase from sales tax. Sales tax charged to an IPDA when the institution is exempt from such tax will be billed back to the faculty member for reimbursement. The easiest way to avoid paying sales tax is to make purchases through [BishopBuy](#).
- The funds available through an IPDA are University funds and not personal faculty funds. Because of this, all goods purchased with IPDA funds remain the property of the University and must be offered back upon separation or retirement.
- IPDA funds are not a replacement for or supplement to personal income. Therefore, IPDA funds may not be used to purchase personal items or services. Examples include, but are not limited to, home internet service, home phone service, home utilities, or any other items used primarily in a faculty member's place of residence. IPDA funds may not be used to set up or support maintenance of a home office.
- The University provides each full-time faculty with a computer and the computer equipment necessary to carry out their core teaching and service responsibilities. Because of this, IPDA funds may not be used to purchase laptop or desktop type computers or computer equipment unless there are specific scholarly or research needs for specialized or dedicated equipment. Exceptions must be approved by the Associate Provost in advance of purchase and must be made through [established procedures](#) unless otherwise approved by the Associate Provost.
- The University provides employees with centralized scanning and printing capabilities in the form of multifunction units (MFUs) located in a number of buildings. These units are cost effective ways to provide local printing outside of Duplicating. Because the institution provides these resources, professional development

funds may not be used to purchase printers, ink cartridges, or toner unless there is a specific scholarly or creative need for dedicated equipment. Exceptions must be approved by the Associate Provost in advance of purchase.

- IPDA funds may not be used for expenses related to learning or research opportunities for students. Faculty professional development funds are intended to support the work of faculty. For example, IPDA funds may not be used to support student registration fees for a conference.
- The University provides a number of software products for use in teaching and research. IPDA funds may not be used to purchase an individual license to software the University already provides through an institutional license. For example, the institution licenses Zoom for use by all employees and students. Therefore, IPDA funds may not be used to purchase an individual Zoom license. For example, the institution provides a license for Blackboard as a learning management system. IPDA funds may not be used to purchase another learning management system unless there is a compelling scholarly or creative reason. Exceptions must be approved by the Associate Provost.
- The University Library provides an enormous wealth of physical and digital resources. Faculty should consider whether IPDA funds should be used to purchase items already available through the Ohio Wesleyan Library or one of its many partnerships and agreements. This includes books, periodicals, journals, and media. In some cases duplication may be appropriate because of the nature of the work. In other situations, it may not be appropriate. For guidance, contact the Associate Provost prior to incurring an expense.
- Faculty may not spend or borrow against potential future allocations to their IPDA. Only current balances may be spent.
- IPDA funds may not be used to pay a salary to a faculty member.
- IPDA funds may not be transferred from one faculty member to another or pooled. Exceptions may be approved by the Associate Provost. For example, faculty may be allowed to pool their IPDA funds to jointly attend a conference that benefits both of them.
- Faculty who will separate from their full-time faculty position are generally not eligible to use IPDA funds in the last semester of their service. Exceptions must be approved by the Associate Provost.
- Unused IPDA funds for a faculty member separating from service will be returned to the University and are not available for redistribution to other IPDA accounts.

Are Emeritus Faculty Eligible for Professional Development Funds?

No, at the present time Emeritus and retired faculty who teach occasionally for the university are not eligible for professional development funds under this policy.