Dear colleagues,
On March 5, we sent a "Did You Know" communication to our bargaining unit colleagues concerning professional development funds. We write today to clarify one of the points that was made in that email: faculty who wish to roll over their professional development allocation must roll over the entire allocation.

In the Q&A portion of that communication, we included the following:

Q. What if I have spent part of my professional development funds for this year already?
A. Check with your AOM to find out how much of your funds have been spent. You can roll-over the unused portion of your allocation.

The relevant portion of our agreement (with current emphasis added in highlighting) reads:
13.7. A Bargaining Unit Member who wishes to roll-over their total allocation from one fiscal year to the other may do so by requesting in writing to forgo funds in one year for the purpose of combining with the following year. However, funds may be rolled for a maximum of one year.

While the intent of our language was to ensure that faculty could roll-over their entire allocation, we did not imagine that the administration would use this language to prevent faculty who had spent a small portion of their allocation this year from rolling over the remainder for use next year. In fact, that interpretation was supported during conversation at a Provost Council meeting on March 4 and then confirmed in a meeting between PSU-AAUP leadership and the Provost on March 13. Since the details seemed to be in dispute among members of the President’s cabinet, we were in the process of co-drafting a memorandum of understanding when the Provost reversed course.

Since the contract language indeed uses the phrase "total allocation," we do not feel it would be worthwhile to grieve and thus we are advising our colleagues who wish to roll over their Professional Development allocation to not spend any of it this year. We apologize if faculty, acting on the advice of our March 5 Did You Know email, have already spent some of their allocation. In such cases, we remind you that the remainder
of this year’s allocation can be spent on the following activities/resources (according to article 13.4):

- Presentations and/or attendance at conferences;
- Membership and participation in professional organizations related to the Bargaining Unit Member’s academic discipline, teaching responsibilities, and other job-related duties;
- Purchase of books and/or other job-related resources;
- Enrollment in workshops or training courses intended to strengthen the Bargaining Unit Member’s job-related knowledge or skills;
- Other activities that will enhance the Bargaining Unit Member’s teaching, scholarship, and/or service.

The spirit of that article was to encourage faculty scholarship for the benefit of the University. It is unfortunate that the administration's narrow interpretation of the contract language may discourage faculty from engaging in exactly the scholarly opportunities that help to keep PSU a vibrant learning community.