



Procedure for using your Professional Development Funds



So you have professional development funds to use for your term,

When using your professional development (PD) funds, members are expected to track their PD fund balances independently of CCNM. CCNM Staff will send out balance updates by request, but this should not be the only way you track your PD fund balance. Here is a TEMPLATE [tracking spreadsheet](#) for you to download. Members are also expected to be the main driver of PD fund use. Members will need to make sure that PD opportunities are discussed with their Mentor/Supervisor. Make sure all communication with CCNM includes your Mentor/Supervisor.

Step 1 (Member)

The first step to using your PD funds is to identify an opportunity that you would like to explore or a resource that would be beneficial for you to have during your project or in your future career endeavors. Here is a [CCNM calendar](#) with PD opportunities and here is a [gear list](#) for ideas. CCNM staff is also happy to brainstorm opportunities with you.

Examples include:

- Travel, lodging, and food for in-person courses and training
- Trainings/Workshops that offer a certificate upon completion
- Professional Memberships
- Virtual courses and seminars
 - In-person and virtual courses should take place during your term.
 - If you are not able to find a course that takes place during your term, you may apply funds to a course that occurs after your term ends within the following parameters:
 - All payment arrangements must be completed before your term ends
 - Course must occur within 6 months after your term ends
 - Exceptions can be requested for training that occurs on an annual basis and falls outside of the 6-month period
 - In these situations, PD funds can only be used to cover the costs of the course
 - Funds cannot be applied to food, travel, or lodging for opportunities that occur after your term ends.
 - Professional supplies/gear (Ex. field pants, books, boots, tent, sleeping bag)
 - These should be items that you will use during your term for your project. Any electronics that could be returned to CCNM or your host site for use by another member in the future is **NOT** an appropriate use of PD funds. Exceptions may be made on a case-by-case basis.



- Examples of **inappropriate** items include camera, tablet, computer, etc. Please note these are examples and not a comprehensive list.

Step 2 (Member and Mentor/Site Supervisor)

Once you have identified an opportunity or resource, you will need to discuss with your Mentor/Site Supervisor to determine if it would be beneficial to you based on what they know of your potential career path and if it fits with your project schedule. Your Mentor/Site supervisor may initiate this conversation at the beginning of your term, but we encourage you to advocate for using your PD funds if that initiation does not occur.

After discussing with your Mentor/Site Supervisor, you will need to investigate the coordination and costs of the opportunity. Some things to consider:

- Cost of the opportunity itself (event ticket, registration fees, etc.)
- Cost of travel and lodging
- Day-to-day costs (meals, gas/mileage, etc.)
- Time away from your host site/regular workflow
 - Make sure you will not miss any major events or deadlines
 - For hourly members, remember to account for travel days as part of your 40 hour per week limit

Step 3 (Member)

Once you figure out all of the above details, you will send an email to your Mentor/Site Supervisor with your Program Coordinator cc'd, detailing this information. As this email will be used to confirm appropriate use of your professional development fund, please be sure to include the following information:

- What the opportunity/resource is
- How will this benefit your professional development
- What dates will you be away from your project duties

Template for Travel PD Request Email

I am requesting to use my PD funds for the following:

Date(s):

Event:

Purpose:



Estimated Travel Cost (ex. flight, gas, mileage):

Estimated Lodging Cost:

Estimated Food Cost:

Estimated Incidental Cost:

Estimated Total Cost:

Balance of PD Funds:

Template for Resource PD Request Email (ex. gear, field clothing, books, etc.)

I am requesting to use my PD funds for the following:

Resource(s):

Purpose:

Estimated Cost:

Balance of PD funds

Step 4 (Member and Program Coordinator)

Once your Mentor/Site Supervisor replies stating they approve of the use of funds, you may move forward with your plans.

Funding Methods:

- **Conservation Legacy Card** (*Refer to main Member Resources Page for Credit Card Procedure*)
 - Most members will be assigned a credit card for use during their term if they have PD funds over \$500
 - For PD funds of less than \$500
 - Your Program Coordinator can make the purchase for you, please consult with them
 - Members must request Program Coordinator's assistance at least 2 weeks in advance of need
 - Availability of a staff CL credit card will be dependent on other member and programmatic needs
- **Reimbursement with Itemized Receipts**
 - This option will require you to cover any costs upfront and then request reimbursement



- Please note – reimbursement requests should be submitted no later than 1 month after the end of the PD opportunity
- **Per Diem**
 - This option allows us to provide funding in advance, but typically spends your PD funds at a higher rate than reimbursing the actual cost
 - Per Diem amounts are based on your destination. Use [GA](#) website to determine rates for your travel

Step 5 (Member and CCNM Program Staff)

If you are requesting reimbursement or per diem, contact your CCNM Program Coordinator. They will send you the appropriate forms to fill out and will submit completed forms to Payroll for payment.

Step 6 (CCNM Program Staff)

Reimbursable expenses and Per Diem will be processed and distributed as a direct deposit via payroll.

If you encounter situations outside of our above policies and procedures, please contact your Program Coordinator for assistance.