

City of Portland CPPW Professional Development Fund Checklist

Request for Funding

- ☐ Complete the [Professional Development Fund \(PDF\) Request Form](#) online Smartsheet. Paper requests will not be accepted.
- ☐ The Smartsheet form will require all the information to complete a valid request. This includes:
 1. Union information, your name, personnel number (PERNR) (this can be found in the top left of your timesheet), bureau, Interoffice address, job classification, amount of funds requesting.
 2. If the request requires time away from work, the Smartsheet will send an approval request email to your supervisor.
 3. Your explanation (narrative) on how the request relates to your position and how the funds will benefit you with regards to your professional development as described in the [Collective Bargaining Agreement between the City of Portland and CPPW](#), Article 20.
 4. The City Pay option is available for instructor-led courses or a conference. If you select Yes, do not have your bureau pay (this is how City Pay works) until you receive the official approval notification from the PDF Administrator. Once the request is approved, the PDF Plan Administrator will provide further instructions for your bureau's Admin's Support, Training Coordinator, or whomever is responsible for payment of training.
 5. When seeking reimbursement, employees must pay for the eligible memberships, events, books, etc. (refer to the [CPPW Plan document](#) under **Reimbursement of Approved Requests Process**, on page 3). This keeps the training fund in compliance with Accounting Rules per the City Comptroller.
 6. Upload documentation from the organization's webpage that includes details that show what it is (courses, seminars or conferences, memberships, licenses, etc.), dates, and costs for your request (PDF, Word, or PNG files will work).
 7. If you have already paid, submit all receipts.

Note: Before submitting, be sure to check the 'Send me a copy of my responses' box'.

The CPPW PDF Committee will notify you of its decision within approximately 3-4 weeks following receipt of your complete request.

For all requests, you are responsible for obtaining a copy of proof of attendance (at the seminar or conference, or proof of completing the class or exam with a passing grade). In addition, proof of membership and license renewals are also required.

Update Request

- ☐ If you need to submit additional documentation to BHR, select Upload Documents to Existing Request on the Smartsheet form to upload your documentation. Be sure to select 'Send me a copy of my responses' before submitting your request).
- ☐ If your request was paid for by your bureau and PDF Funds are not needed, please cancel your request for funding.

[Professional Development Fund -CPPW | Portland Employees](#) webpage.

Questions? Please contact one of the CPPW Committee members below:

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