

City of Portland CPPW

Professional Development Fund Plan Document

Purpose

The CPPW Professional Development Fund (CPPW PDF) is established by Article 20 of the CPPW collective bargaining agreement (CPPW CBA) between CPPW and the City of Portland (City) effective January 1, 2025 - December 31, 2027 to promote professional development for CPPW -represented employees.

CPPW Committee

The CPPW Professional Development Committee is established in accordance with Article 20 of the CPPW CBA to review, approve and communicate funding requests for professional development as it pertains to an employee's current position, for another City position in their classification series, or in reasonably related work.

Plan Year Funding Availability

CPPW PDF funding is available on a plan year basis, based on fiscal year, as provided in Article 20 of the CPPW CBA. Funding requests are accepted for eligible expenses only for the plan year in which the training or development will occur.

All training, seminars, conferences, or other approved expenses must commence (start) no later than the final day (June 30th) of the present Plan Year. Please note that the training, seminars, or conferences may conclude (end) after the last day of the current Plan Year (for instance, a course might start on 6/30/2026 and end in July or later).

Employee Eligibility

The intent of CPPW PDF is to provide funding for eligible training and professional development expenses. An employee shall be eligible for reimbursement after ninety (90) days service with the City and may submit Requests for Funding for review and approval by the Committee. However, reimbursement will not be paid until after the 90-days have been successfully completed and all other requirements for reimbursement eligibility are met. Employees must confirm that requests are related to current position.

Training and Professional Development Eligibility

CPPW PDF funds may be used for:

- Fees and/or tuition for professional development seminars, exams, classes, online training subscriptions, workshops and conferences (some fees may not be covered, for example gym, building & incidental fees).
- Books, tapes, videos/DVDs and software to assist the employee in his/her professional development. Items such as these remain the property of the City and must be turned over to the Bureau upon the employee's separation from the City.
- Licenses, certifications and professional dues not paid by the employee's bureau. A maximum of two state licenses or professional memberships are allowed for different licenses and/or professional memberships only. Reimbursement will not be approved for the same professional license held in multiple states (for example, requesting reimbursement for a PE License in both California and Oregon). Exams are eligible if the employee passes the exam.

- Employees are encouraged to explore multiple funding sources (from both the Bureau and the CPPW PDF) in circumstances where requested training is of direct benefit to the employee's Bureau. However, employees pay for the eligible memberships, events, books, etc., upfront when seeking reimbursement from the training fund. This keeps the training fund in compliance with Accounting Rules per the City Comptroller. For an **instructor-led course or conference**, employees can request that the City pay upfront by selecting the City Pay Option on the request form. Once approved, the PDF Plan Administrator will then provide further instructions for the employee's bureau's Admin Support, Training Coordinator, or whomever is responsible for payment of the training.
- The CPPW PDF is not to be used to pay for City-mandated training.
- The CPPW PDF may not be used to purchase computer hardware or consumer electronics for personal use (for example, computers, PDAs, phones, networking hardware, cameras, calculators, and other similar equipment).
- Reimbursement is permitted for special event meals/banquets included with the fee/tuition of a conference or training seminar, if the event has a purpose that is reasonably related to the approved professional development (for example, a conference awards dinner, or a banquet with a conference keynote speaker).
- The CPPW PDF **may not** be used for travel expenses, including air transportation, car rental, mileage, per diem, parking, hotel/motel cost or any other travel-related expenses. However, if a Bureau or the employee is paying for travel cost, the CPPW PDF may be used to pay for out-of-town conference registration.
- Proof of attendance at classes, workshops, conferences, and seminars is required. For classes, a copy of the grade report with a final passing grade is required; for a workshop, conference or seminar, a certificate of attendance or other document showing attendance is required. For training subscriptions, employees must provide proof of completion for classes taken in the current plan year.

Funding Maximums and Distribution

Funding for the CPPW PDF is limited. Eligible CPPW -represented employees may request reimbursement up to the maximum amount each plan year. Employees will be reimbursed on a first come, first served basis. Employees will not be eligible for reimbursement when available funds have been exhausted. The Fund will be administered to ensure that all eligible employees have a reasonable opportunity to request and receive reimbursement of eligible expenses and that funds are available to be distributed on an equitable basis.

The CPPW PDF has established a maximum reimbursement amount of **\$4,000.00** per employee per plan year, or until funds are exhausted for that plan year. The maximum reimbursement amount will be reviewed and may be amended by April 1st of the current fiscal year, by PDF Committee consensus, to appropriately administer the Fund. CPPW -represented employees will be notified if the maximum reimbursement is changed. The maximum reimbursement is not a guarantee of reimbursement for any specific request. The CPPW PDF does not establish a personal account for any individual employee.

Request for Funding Process

To request funding, employees must submit a CPPW PDF Request for Funding application form, along with supporting documentation (receipts, details with costs) that describes how the employee will benefit from requested funds. If the bureau is paying for the request, do not submit a PDF request.

Employees must include information that lists the costs and timelines to complete training or attend seminars.

- Employees are expected to complete CPPW PDF approved training or attend seminars on their own time or have prior approval for time off (i.e. vacation leave, unless City-paid time is specifically approved by employee's supervisor). Under Article 20, release time to attend professional development needs shall be subject to approval by the City, which shall not be unreasonably denied when the training is directly related to the employee's City job. Supervisor approval is required if training is scheduled during the employee's normal work shift.
- Employees are expected to complete registration forms and other administrative requirements on their own time and in a timely manner. The CPPW PDF Committee will not approve funds to cover late fees.
- Where appropriate, employees should ask for bureau training funds prior to submitting a Request for Funding to the CPPW PDF. For example, an employee request for bureau funding is encouraged if an employee is attending a professional conference not directly related to the employee's current job. Failure to obtain bureau funds will not be used as a reason to deny a CPPW PDF funding request. **However, the request may be denied if it is not related to or will not benefit the employees' current position.**
- The BHR [Professional Development Fund -CPPW | Portland Employees](#) webpage is available to represented employees.
- Select [Professional Development Fund \(PDF\) Request Form](#) to access the online request form to submit a request. Note: Paper request forms will not be accepted
- **Requests and receipts for submitted requests must be received by June 17th, of the current fiscal year to allow for end of fiscal year processing.** If receipts are not received by June 17th, pending requests may be canceled.
- The CPPW PDF Committee will review Requests for Funding for approval. The employee can expect a decision from the Committee approximately 3-4 weeks after receipt of a complete Request for Funding. Upon approval by the CPPW PDF Committee, BHR will notify the employee.
- Any request that is denied will be communicated to the employee.

Committee Member Funding Requests

If a CPPW PDF Committee member is requesting funds, the CPPW President or their delegate will replace the member for consideration of that funding request.

Reimbursement of Approved Requests Process

If employees are required, or choose to use their own funds upfront, they will be reimbursed for eligible approved expenses after all receipts and documentation are submitted.

Once receipts are received by the Plan Administrator, they will be reviewed for completeness and processed for

reimbursement. Employees should receive payment through the City's payroll system within 4 weeks after submitting a complete reimbursement request.

Reimbursement requests must be submitted as soon as possible after completion of the training or date of initial funding approval (e.g., for approved software, videos/DVDs or book purchases).

Administrative Procedures

The City will maintain the tracking process for CPPW PDF administration and will provide a quarterly report for the CPPW PDF Committee, CPPW President, and BHR Director to document how the CPPW PDF is being administered. Administration of the CPPW PDF will comply with all City administrative rules and accounting requirements.

Request for Appeal/Reconsideration

If the CPPW PDF Committee denies a request or reimburses the employee for less than what was requested, and the employee is not satisfied with the explanation, the employee may write a letter to the committee at CPPWProfDevFund@PortlandOregon.gov requesting reconsideration of the decision. The committee will consider the employee's letter and may choose to reverse or modify their initial decision or authorize supplemental reimbursement if warranted. The employee also may review the committee's paperwork related to their request. The Committee's decision is final.

Taxability of Tuition Reimbursement

Certain tuition reimbursements may be considered taxable income and reported on the employee's W-2 withholding form for the year the reimbursement is disbursed. According to Internal Revenue Code Section 127, the following reimbursed educational expenses are excludable from gross income:

- Education required by the employer or by law for the employee to keep his/her/their present salary, status, or job.
- Education that maintains or improves skills required to do the employee's present job duties.
- Payments received by an employee for tuition, fees, books, supplies under an employer's educational assistance program.

Please be aware that the CPPW PDF is a fiscal year fund. Each fiscal year has a request CAP (maximum amount allowable). If a represented employee's reimbursements in the current and prior fiscal year exceed \$5250 in the **calendar** year, the amount over \$5250 will be taxable. For more information, please visit: [Frequently asked questions about educational assistance programs | Internal Revenue Service](#)

Questions

For questions, please the CPPW PDF Committee at cppwprofdevfund@portlandoregon.gov

Definitions

CPPW PDF Plan Committee: committee comprised of two CPPW members and two City of Portland management representatives. The Committee is established in accordance with the CPPW CBA.

CPPW PDF Plan Administrator: The Bureau of Human Resources is the administrator of the Plan and is responsible to ensure requests and reimbursements are transacted timely and in a manner consistent with City administrative rules and accounting requirements.

Plan Year: For the purposes of the CPPW PDF, a plan year is from July 1st to June 30th.