



CLASSIFIED EMPLOYEE **2021-2022**
PROFESSIONAL EDUCATION PROGRAM (PEP) FUND REQUEST
 Eugene Public Schools/Oregon School Employees Association

NOTE: Inquire about available site funds first. Up to two requests may be made each school year. Maximum fund payment is \$500 per person, per school year. Requests are processed on a first-come, first-served basis.

Name: _____ Employee #: _____ Date: _____

Bldg/Dept: _____ Job Title: _____

4J email address: _____ Work extension or home phone: _____

Date of Class/Workshop: _____ Class/Workshop Title: _____

Class/Workshop Brief description:

I am including class/workshop flyer or other back-up documentation.

List Expenses:

Note: Employees must obtain principal/supervisor permission to attend all PEP fund eligible professional development. The building/department is responsible for in-house or substitute coverage. Requests for substitutes should use the *Building Professional Development/Activity code in AESOP*.

Check one option for payment:

I am requesting payment for expenses I've already paid. The payment will be on my paycheck, listed under "Reimbursements." **I have attached a paid receipt or copy of the cancelled check.**

I am requesting reimbursement for a District Credit Card. Name of card holder _____
I have attached a paid receipt (when approved, a reconciliation account number will be emailed to the card holder)

I am requesting payment be made directly to the vendor. I understand that I must submit this request **at least four weeks before the registration deadline of the event, and give the following information:**

Vendor Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Send Completed Form To:
Sally Duerfeldt- Education
Center

Office Use Only

PO (Pay to vendor at above address) District Credit Card Reconciliation Payroll Payment (to employee)

Order #: _____ PO #: _____ Date Processed: _____

Amount Approved: _____ Account #**100-765-2641-000-245**

Approved by OSEA: _____ Date: _____

Approved by District: _____ School Year: _____/ _____

**EUGENE SCHOOL DISTRICT/OREGON SCHOOL EMPLOYEES ASSOCIATION PROFESSIONAL EDUCATION PROGRAM
(PEP) GUIDELINES FOR 2021/22**

These guidelines are for the administration of the classified PEP fund as allocated in Article 19.3 of the 2018~2022 Collective Bargaining Agreement between OSEA and Eugene School District 4J.

- The purpose of the fund is to provide opportunities in professional development and is intended to help classified employees improve professional knowledge, competence, skills, and effectiveness relevant to their current district position.
- The program includes job-related training activities, tuition reimbursement, registration or materials cost, and conferences and workshops which may be offered through the District or sponsored by OSEA.
- PEP funds are limited for staff development options that are initiated by employees. District mandated trainings are not eligible for reimbursement.
- All eligible expenses are to be paid;
 - By employee with reimbursement through 4J payroll upon receipt of proper form and proof of payment,
 - By district credit card to be reconciled by journal entry upon receipt of proper form and proof of payment, or
 - By requesting payment to be made directly to the vendor.
- Exempt items:
 - Travel expenses such as mileage and food
 - First aid training that is required of classified employees
- Employees must obtain principal/supervisor permission to attend all PEP fund eligible professional development that occurs during normal work hours. The building/department is responsible for in-house or substitute coverage. Requests for substitutes should use the *Building Professional Development/Activity* code in AESOP.
 - Cancellation Policy for computer classes or District/OSEA sponsored trainings that employees are not subject to paying out-of-pocket will be applied as follows: Once enrolled in a class, cancellations are accepted up to 2 business days prior to the class. Employees may always send another classified employee from District 4J in their place, if desired. Any employee who signs up for a class but does not attend or cancel as listed here will be invoiced for the session.
 - Please note the minimum notice is 2 business days. Out of courtesy to the instructor and other interested employees, please give as much notice as possible, in the rare cases where you are unable to attend.
- Program rules allow two requests not to exceed a combined total of \$500, per fiscal (school) year. These requests must be for expenses relating to professional development (workshops, classes, books or other related expenses). Employees may accumulate paid receipts and submit them all at once in the form of one request.
- Requests are processed on a first-come, first-served basis until funds run out.
- To ensure that funds are available and that the purchase will qualify for reimbursement, it is advisable to contact the Classified Benefits Coordinator at 541-790-7679 before making PEP fund purchases.
- All employee reimbursement requests must be received by May 15, 2022 for payroll processing.

Forms shall be available on the 4J Employee Benefits webpage at <http://www.4j.lane.edu/hr/forms/> and from the Classified Benefits Coordinator at 541-790-7679.