



FP&M TRAINING, MEMBERSHIP, AND CERTIFICATION POLICY & GUIDELINES

as of 1/1/2022

FP&M encourages employee development and talent management by providing accessible learning options through UW resources when possible and outside options when appropriate while following all UW Madison / UW System policies and being effective stewards of fiscal resources.

Training, memberships, and certifications are one element of overall talent development and are reviewed by department leadership using the following framework:

- Skill development based on operational and safety needs
- Equitable access to development opportunities – free and for fee
- Budget goals

Correctly completed forms must be submitted a **MINIMUM OF 2 WEEKS PRIOR** to the event date to allow time for processing. Supervisors and employees **CAN NOT** pay for any of these expenses using their P-card or direct payments on their own. Payments for the items below must be processed by FP&M HR/Training.

| Type of Request | Applicable Policy | Sample Justification Language | Questions to Consider |
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| Free UW classes | No formal policy. Employee needs to confirm with supervisor that operational needs are met while attending class. | No need to submit Training Request form for free OHR classes | <ul style="list-style-type: none">○ How will the employee and dept benefit from this course?○ What will the employee be able to demonstrate after taking the course? How will the employee share learning?○ Is this learning documented in the employee's Performance Management & Development Plan? |
| For fee training and conferences | No formal policy. Consider the 3 criteria: 1. Dept skill development needs 2. Equitable access for other employees 3. Dept budget | At least 2 weeks in advance, submit the appropriate departmental request form found on Inside FP&M Human Resources – Training & Development page with detailed justification. | <ul style="list-style-type: none">○ Has the overall participation in conferences for your dept been considered? How does this request fit into the dept's overall skill development, operational needs and budget goals?○ How will the employee and dept benefit? How will learning be shared?○ Is this learning/conference documented in the employee's PMDP?○ Can the learning need be met by a UW Conference? (Leadership & Management Development Conference, Office Professionals Conference, HR@UW Conference, Information & Technology Leadership Conference, Diversity Forum) |



Facilities Planning & Management

UNIVERSITY OF WISCONSIN-MADISON

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| Memberships | <p>Reference UW System Memberships Policy and submit a request form with a detailed justification based on the requirements below – see policy for full language.</p> <p><i>When an annual or multi-year membership to a professional association, society or organization is paid or reimbursed through university business processes, the membership must be deemed necessary to the effective performance of University of Wisconsin System operations. UW Institutions are generally prohibited from purchasing a membership if the primary beneficiary of the expenditure is the individual unless expressly permitted by this policy.</i></p> | <p>Customize justification based on department need and goals</p> <p>Membership in [XX] is important to the overall effectiveness of [XX] department operations due to the access to research, publications and professional resources as well as [reduction in fees for virtual and in-person training/other]. For [association], there is not an option for an institutional membership and access to [training/reports/tools] requires individual membership.</p> | <ul style="list-style-type: none">○ Has the overall participation in memberships for your dept been evaluated and how this request fits into the dept's overall skill development and operational needs and budget goals?○ Is this membership documented in PMDP?○ Does the membership benefit the organization directly (through access to reports or training that are used in departmental work – example: fire codes, NFPA-70) or indirectly (benchmarking or professional development opportunities) or “is the primary beneficiary of the expenditure the individual? The individual and department purchasing the membership should be prepared to justify to any internal or external constituency, including the media, the necessity of obtaining a membership.” See UW System Memberships Policy○ Does the employee regularly share learning and resources from the membership with the dept? Can others access resources?○ Do all employees in the department/position need a membership? Is there a group membership option available? |
| Licenses, Certifications or Exams | <p>Reference UW-Madison Non-Payable/Non-Reimbursable Expenses Policy and updated Revision to Payment of Licenses dated 2/14/2017</p> <p><i>Unless there is clear authority in an applicable collective bargaining agreement, university payment of professional license fees is prohibited regardless of the source of funds. The salary established for employees is intended to attract and retain staff based on the education, experience, and special training required to perform the work. For some staff this includes the requirement that they have a professional license to hold a particular position. The payment of license fees to maintain professional credentials is the responsibility of the employee. An exception to this rule may be granted in rare circumstances when a current employee is asked to obtain a license or certification for the convenience of the university.</i></p> | <p>Customize justification based on department needs and goals</p> <p>This [XX certification/license] was not a requirement for the position upon hire and is now necessary in order to do [XX] for the [XX] department. By having this [XX certification/license], we will reduce the cost to perform [XX] because we will not have to [hire outside contractors, other justification].</p> | <ul style="list-style-type: none">○ Was the certification/license required as a condition of employment at hire? For example – did the employee need to be a licensed architect, licensed plumber, licensed accountant, licensed attorney? If so, per UW-Madison Non-Payable/Non-Reimbursable Expenses Policy, we cannot pay for on-going licensing fees.○ Would having the certification/license save the dept money/time by not having to pay external contractors to complete the work?○ Do all employees in this job have to have this certification/license? If not, what operational need does this certification meet that requires this employee to have this certification/license?○ Is this certification/license documented in the employees Performance Management & Development Plan?○ How will you and the employee make time to mentor other employees who do not hold this certification/license?○ Under no circumstances can the department pay for exam fees per UW-Madison Non-Payable/Non-Reimbursable Expenses Policy, unless the exam is bundled into coursework/conference/membership. |