Individual Development Awards (IDA) Program Guidelines
Program Year 2026-2027

1. OBJECTIVE

The Individual Development Awards (IDA) Program is designed to support a variety of projects and activities for eligible full-time and part-time academic and professional employees that will assist them to develop their full professional potential and prepare for advancement. Employees who accrue annual leave are not required to charge leave credits for any project or activity funded by the IDA Program. The IDA Program is administered by a joint labor-management Campus Professional Development Committee which establishes application submission dates, processes, and reviews applications, makes awards, and notifies applicants pursuant to the review process.

2. PROGRAM FUNDING AND ALLOCATION

Funding for the IDA Program is provided through labor-management funds negotiated under Article 21, Statewide Joint Labor-Management Committees of the Agreement between the State and United University Professions.

Each Campus Professional Development Committee receives an allocation for the program year based on the number of UUP-represented employees on a campus. The Campus Professional Development Committee is required to dedicate a minimum of 15% of the funds allocated to their campus to part-time employees. If applications from part-time employees amount to less than 15% of the total funds, then the remainder from the set aside amount can be reallocated to awards for full-time employees. On campuses where more than 35% of the employees are part-time, the Campus Professional Development Committee should consider increasing the portion of funds set aside for part-time awards.

3. ELIGIBILITY

- Full-time and part-time employees must be in the bargaining unit at the time of applying for the award during the dates of the projects or activities, as well as when the reimbursement for the activity is awarded.
- Part-time employees who meet the eligibility tests for 26-week employees shall be eligible for enrollment for health insurance under the State's Health Insurance Program pursuant to Article 39 Health Insurance, and are eligible for health benefits during the summer, will also be eligible for funding for a project or activity that occurs during the summer, even if they are not on the payroll during the summer.

4. AWARD AMOUNT

Employees may be funded for up to two projects or activities, not to exceed a total of $2,000 for the period of July 2 through July 1 of the following year.

5. ELIGIBLE PROJECTS AND ACTIVITIES

a. The proposed projects or activities must enable the employee to meet one or more of the criteria specified in the following SUNY Policies of the Board of Trustees: Title A. Evaluation of Academic Employees, §4. Criteria (a) – (c) Title B. Promotion of Academic Employees, §2. Criteria (a) – (c) Title C. Evaluation and Promotion of Professional Employees, §5. Criteria (a) – (e), of Article XII Evaluation and Promotion of Academic and Professional Employees, of the Policies of the Board of Trustees.

b. Proposed projects or activities must fall into one of the following categories:

- Basic, applied, or historical research.
- Curriculum or instructional material development.
- Workshop, seminar, internship, or course work not covered by Article 49, Program for Tuition Assistance or SUNY tuition waiver.
- Conference participation or attendance.
- Preparation of material for publication.
- Grant proposal development.
- Artistic or creative endeavors.
- Other work-related professional development projects or activities.

c. Funds are available to support projects and activities including:

- Registration fees for conferences or workshops.
- Professional organization membership fees which are bundled with a free or reduced members-only rate for conference or workshop attendance expenses.
- Travel and related expenses (including lodging and meals).
- Tuition at the maximum allowable SUNY rate for the course at the time of application, excluding associated fees.
- Fees for licensing or certification exam prep courses (e.g., USMLE Step 3 exam, medical board exam, or bar exam prep course, etc.).
  NOTE: Employees may be eligible for both IDA and CLEFR/CLRP reimbursement.
  - Reimbursement for Certification and Licensure Exam Fee Reimbursement Program can be accessed at: https://oer.ny.gov/nysuupclefr
  - Reimbursement for Certification and Licensure Reimbursement Program Renewals can be accessed at: https://oer.ny.gov/nysuup-jlmc-clrp-renewals-program
- Fees for continuing education courses (e.g., CME or CLE courses).
- Entrance or access fees to institutions or archives that house materials which are related to, and the review or use of which is necessary, to complete the research or artistic endeavor.
- Funds are available for expenses related to professional development projects or activities that are not provided by the employee's campus, department, program, or through other funding sources, including research materials, short term use of specialized equipment, services for skills, and costs associated with publication as follows (see 7(c) below for additional information).
- Consumable artistic or research materials, which are necessary to complete the research or artistic endeavor (e.g., reagents, antibodies, dyes, art supplies, sheet music).
- Fees for short term use of specialized equipment or skills (e.g., sound mixing/engineering, recording studio fees, video recording and editing fees, performance space rentals, real time PCR testing, RNA sequencing).
- Costs associated with publication (e.g., copyright or licensure fees, journal page charges, and stipends or fees for indexers, proof reading, translations).

6. INELIGIBLE EXPENSES

Except as otherwise provided above, expenditures are not eligible for reimbursement that include, but are not limited to:

- Payments to third parties, including subcontracting, for administering the project or activity.
- Supporting the cost of fringe benefits.

- Fees associated with tuition.
- Professional organization membership fees (except where they are bundled with a free or reduced members-only rate for conference attendance).
- Payment to the employee including extra-service payments, payment to reimburse a campus for the employee's time, or stipends to the employee.
- Payments to others for assisting with a project or activity including research assistants, administrative support, students, or research subjects.
- Purchasing food to be provided to attendees at conferences, seminars, workshops, or other events.
- Purchasing furniture, equipment, or non-consumable supplies, including computers, laptops, books, software, or databases.
- Payment of rent or other fees for long-term use on or off-campus space.
- Funding for journal subscriptions, internet or cellular services, advertisements, or any item or service that serves an ongoing need.
- Costs related to renovations or insurance.
- Purchasing items for students or others related to a course, project or activity, or research.
- Cash or cash equivalent awards including gift cards, savings bonds, etc.
- Costs for items that are otherwise provided by the campus or other funding sources.

7. PURCHASING REQUIREMENTS

When applying for funds to purchase eligible items, be sure to adhere to the following procedures:

a. Obtain proof of cost from a vendor. A reliable vendor should be selected, and services or items purchased should be at a reasonable cost. Applicants may demonstrate reasonable cost by providing documentation of the cost of the item or service from a few vendors (screen shots from the internet are acceptable documentation). Whenever possible, a Minority and Women Owned Business Enterprise (MWBE) vendor search should be included in your documentation.

- In instances where a sole source vendor has been selected to provide the services or items, i.e. only one vendor can provide the services or items required, State Finance Law § 163(10)(b)(i) requires documentation of the justification, the process, and attributes used to select the sole source vendor, including why the vendor is the only viable source. The documentation should include the unique nature of the requirement and the circumstances leading to the selection of the vendor, including reasonableness of cost.
- In instances where a single source vendor has been selected to provide the services or items without a formal competitive process, but two or more vendors can supply the services or items required, State Finance Law §163(10)(b)(ii) requires documentation as to the circumstances (i.e. unforeseen emergency, unusual circumstance, etc.) and reasons why a formal competitive process is not feasible. The documentation should include the unique nature of the requirements and the circumstances leading to the selection of the vendor including alternatives considered and reasonableness of cost, that differentiates why no other vendor can provide the services or items.

b. When purchasing a single item or service of $250.00 or more, or multiple items of the same where the total is $250.00 or more but less than $500.00, two different vendors' price quotes or a single source justification must be submitted. This applies if purchasing multiple items that cost less than $250.00 each but due to the number of items total more than $250.00 but less than $500.00.

c. When purchasing a single item or service of $500.00 or more, or multiple items of the same, where the total is $500.00 or more, three different vendors' price quotes or a single source justification must be submitted. This applies if purchasing multiple items that cost less than $500 each but due to the number of items purchased cost $500.00 or more.

d. Enter the lowest vendor price quote in the budget summary.

e. Shipping is an allowable expense.

8. TRAVEL REQUIREMENTS

a. When applying for funds to cover travel costs, please consult the New York State Comptroller's Travel Manual. In most cases, State employees are expected to keep hotel, airfare and rail expenses at or below the approved US General Services Administration (GSA) rates. Exceptions can be made, however, where appropriate expenses exceed the GSA rates and specific documentation is provided (see below). When booking travel, employees should check the GSA rates, and, if necessary, collect documentation that justifies reimbursement at higher rates.

b. Hotel rates that exceed the GSA rates may be approved if the applicant can provide justification and documentation for a higher rate. Such circumstances include:
- Staying in a conference hotel if it exceeds the GSA rate because the applicant is presenting or performing other duties at the conference or meeting.
- Staying at a hotel due to the costs of transportation from properties that do not exceed the rate to the conference or meeting, or because official events end late and would require late night travel back to other lodging.
- The applicant's mobility or other needs.
- The lack of availability of hotels within a reasonable distance of the conference hotel offering GSA-compliant booking rates.

c. Where the applicant seeks to exceed the GSA lodging rate, the applicant must:
- Provide screenshots or other documentation reflecting the booking rates for three other nearby hotels reflecting higher booking rates; and/or
- Include screen shots or other documentation of taxi or rideshare searches for transportation between hotels and events to reflect that while the selected hotel is not GSA compliant or cheaper than other alternatives, the transportation expenses associated with staying at the cheaper property would exceed any potential hotel savings; and/or
- Offer evidence that the applicant is scheduled to present at early morning or late-night sessions and/or attend late night or early morning events and that the minimal cost savings associated with staying at a GSA-compliant property are outweighed by the impact to the professional development activity.

d. Where the applicant seeks to exceed the GSA YCA flight rates, the applicant must:
- Provide a screenshot of a flight search engine showing comparative options being more expensive than the selected flight; and/or
- Offer evidence that the available GSA YCA compliant flight would result in significant hardship for the applicant (i.e. excessive layovers, disruptive flight times, etc.); and/or
- Provide evidence that a selected flight may appear more expensive than alternatives until factoring in baggage costs; and/or
- Furnish proof of medical necessity for the flight selected.

e. Where the applicant seeks to exceed the GSA train rates, the applicant must:
   - Provide a screenshot of alternative train tickets showing comparative options being more expensive than the selected train; and/or
   - Offer evidence that the available GSA compliant train would result in significant hardship for the applicant (i.e. excessive stopovers, disruptive departure times, etc.).

9. APPLICATION PROCESS

a. Use the Individual Development Award Program Application form and read the Application Instructions.

b. Fill out, print, and sign the application. For funding requests under sections C.11-C.15, your supervisor or department, program, or unit head signature is required.

c. Provide all required information and attachments describing the proposed project or activity with your application including:
   - Event details: the event's name, date, time, location, type of event, agenda, and sponsor.
   - Whether you are presenting a paper or formally participating. If presenting a paper, the title of the paper and nature of the presentation must be provided.
   - A letter of acceptance of the paper being presented or other proposal. If acceptance is pending, the Campus Professional Development Committee should be notified of its receipt.
   - A description of how this project or activity will further your professional development or otherwise assist you in preparing for advancement.
   - A current *curriculum vitae*.
   - A brochure, announcement, agenda, or other relevant material describing the project or activity. If material is not yet available, information should be sent to the Campus Professional Development Committee as soon as possible. The Committee cannot approve an application that is pending additional information.

d. A justification must be provided for funds requested to support projects or activities under 5(f) of these guidelines that require research materials, fees for short term use of specialized equipment, or services for skills, and costs associated with publication that are not provided by your campus, department, program or through other funding sources.

e. Ensure that your application is legible and complete. An illegible or incomplete application may delay acting on your application. The Committee cannot approve an application that is pending additional information or incomplete.
   - Submit your completed application to your Campus Professional Development Committee. Contact your Human Resources office or the UUP Chapter Office to obtain your Campus Professional Development Committee's contact information.
   - Additional information may be requested by the Campus Professional Development Committee or NYS/UUP JLMC staff.

10. APPLICATION DEADLINES

The deadlines for submitting applications are determined by each Campus Professional Development Committee. The date should provide sufficient time for the Committee to review and process applications, including review by NYS/UUP JLMC staff, to ensure that applicants are notified in a timely manner.

11. AWARD NOTIFICATION

The decision to fund an application is at the discretion of the Campus Professional Development Committee. Employees will be notified by the Campus Professional Development Committee of their award.

12. REIMBURSEMENT PROCEDURES

Reimbursement may be processed after an application is approved and the expense has been incurred. A voucher, supported by appropriate receipts, should be processed through your campus fiscal office.

13. UNUSED CONSUMABLE MATERIAL/ITEMS

Any consumable materials or items which are not fully used in the course of completing the project or activity that were purchased with NYS/UUP JLMC funds remain the property of the campus.

14. PROGRAM EVALUATION

There is no requirement to submit a Program Evaluation to the NYS/UUP JLMC office. Each Campus Professional Development Committee determines the type of evaluation to be submitted to the Campus Professional Development Committee.