Central Professional Development Guidelines

1. PURPOSE

PEA staff members contribute to fulfilling the University's research and instructional mandate by engaging in professional development activities. For the purposes of these Guidelines, professional development includes those activities which enhance a staff member's work performance, ability or effectiveness and contribute overall to the successful achievement of the University's mandate.

The purpose of the Central Professional Development Fund (the Central Fund) is to assist PEA staff members in funding professional development opportunities that cannot otherwise be funded.

2. ADMINISTRATION OF THE FUND

A standing Joint Committee will be established comprising two representatives from the University and two representatives designated by the PEA.

The Committee will:

a) allocate and adjudicate funds within the Central Fund
b) receive, review and approve applications to the Central Fund

in accordance with the criteria and procedures set out in these Guidelines.

3. ELIGIBLE EXPENSES

Applications for funding from the Central Fund may range from a minimum of $250.00, and normally to a maximum of $1,000.00 per application. In exceptional circumstances, the Committee may approve applications up to a maximum of $1500.00.

Consistent with the PDEA Administrative Guidelines, the following expenses
can be claimed for reimbursement:

- travel (including accommodation),
- tuition,
- course or registration fees and other expenses for conferences, workshops, seminars and other similar activities; and,
- meetings of professional and business organizations expenses directly associated with the staff member's professional development program (e.g. books, journals, materials, page charges, reprints, interlibrary loan charges).

As non-taxable benefits, any goods, books or equipment purchased from the Central Fund will remain the property of the University.

4. APPLICATION AND REIMBURSEMENT PROCEDURES

The staff member applying to the Central Fund for reimbursement of professional development expenses shall:

a) complete the application form demonstrating that the expenditure will benefit the University in compliance with Revenue Canada guidelines for non-taxable benefits

b) submit the application form to the staff member's supervisor for evaluation of the benefit to the University and for pre-approval of Department Head

c) submit the application form with Department Head pre-approval to the Committee

c/o: Kate Fuller, Human Resources (Sedgewick B Wing)

By May 31st or Sept. 30th or Jan. 31st as applicable.

After written notification from the Committee that the application has been approved, the member may make purchases and pay for the professional development expenses in accordance with that approval.

d) submit the reimbursement claim, original receipts and the written notice of the Committee's approval to the Central Fund administered
by Accounting Services.

5. CRITERIA AND PROCEDURES FOR DISTRIBUTION OF FUNDING:

a) The Committee will review applications for available funds designated by the University twice a year during each year, July 1 to June 30.

b) The Committee will publish its application deadlines and meeting schedule at the beginning of each academic year.

c) Applications for reimbursement will be considered on a first-come-first-served basis. In addition, priority will be given to applications where:

   the staff member's PDEA is first depleted or requires top-up from the Central Fund to cover incurred pre-approved costs, and/or there is a contribution from the Department's staff development budget funds, preferably matching the amount requested for reimbursement from the Central Fund, and/or the staff member has not been granted funding from the Central Fund during the 24 month period preceding the most recent date of application.

d) The Committee will acknowledge all applications to the Central Fund in writing, and applicants will be advised when the Committee is meeting to consider applications. Applicants will be notified in writing of the Committee's decisions.

e) The Committee will approve applications, based on the Guidelines, until the funding available for a given period has been depleted. An application that is not funded may be re-submitted for consideration in the next period.

f) Any funds not allocated within a given period will be carried forward to the period. Any surplus funds that have not been allocated at the end of the academic year will be carried forward to the next year.
6. EXPENDITURES

Funds approved for reimbursement must be accessed from the Central Fund and expended within six months of the Committee's written notification that an application has been approved, unless any variance from this timeline has been pre-approved in writing by the Committee.

7. REVIEW OF APPLICATION DECISION

A staff member whose application to the Central Fund is not approved may request, in writing, that the Association/University Committee review the application and Committee's decision and, if appropriate, make a recommendation to the University. Reviews will be considered only on grounds related to application of the Guidelines and will not be subject to the grievance and arbitration procedures.

8. REVIEW OF GUIDELINES

These guidelines will be reviewed by the University in consultation with the PEA following an initial trial period of twelve (12) months.