

## **Professional Development Expense Account (PDEA): Guidelines for Professional Employees' Association (PEA) Staff**

**See Policy:** [HR6420](#)

### **Overview:**

The University recognizes the value of a professional staff group that is fully engaged, current in their field of expertise, curious to learn, and committed to sharing and applying their knowledge within the UVic community. Therefore, the University has established this funded program and [Policy](#) to support individual professional development for the eligible Professional Employees' Association staff. For purposes of this Policy, professional development includes those activities which enhance the knowledge, performance, or career progression of an employee's work at the University and contributes to the successful achievement of the University's mission.

### **Who Is Eligible?**

Effective July 1<sup>st</sup> of each year, regular continuing PEA employees and qualifying employees in a term appointment will receive a \$250 entitlement in a Professional Development Expense Account (PDEA) for this purpose.

Employees appointed to a term position for longer than 1 year are eligible to receive the allowance after their first year of service.

The university will temporarily suspend annual contributions to professional development expense accounts for individuals in receipt of long-term disability benefits or a long-term leave of absence, other than maternity and parental leave. Annual contributions will be recontinued in the year the individual on long-term leave returns to work.

### **Eligible Expenses:**

Eligible Expenses are expenses eligible for reimbursement, as follows:

- a) travel (including accommodation), tuition, course or registration fees and other expenses for conferences, workshops, seminars, professional organizations and other similar activities;
- b) membership fees in learned societies and professional organizations;
- c) expenses (e.g., books, journals, materials, page charges, reprints, interlibrary loan charges) directly associated with professional responsibilities

As of January 1, 2025, equipment (e.g. computer equipment, including but not limited to laptops, tablets, printers, smart phones, smart watches, accessories and peripherals, and audio-visual equipment) and other items are not eligible for reimbursement.

## **Other Ineligible Expenses:**

### *Travel-Related*

- Air travel cancellation insurance
- Briefcases or luggage
- Business or first-class travel
- Travel costs of another individual
- Travel guide books

### *Personal*

- Childcare expenses
- Entertainment expenses and gifts
- Medical costs or prescriptions
- Office furniture and furnishings
- Office supplies for home use
- Passports and renewal fees
- Personal clothing other than safety gear or regalia
- Personal living expenses while on leave
- Recreational or lifetime membership fees

### *Other*

- Data and voice plans
- Home internet fees
- Fines, late or change fees
- Recruitment expenses
- Salaries or honorariums
- Third party work, services or expenses

## **Additional Requirements:**

Airfare: Economy class only.

## **Prior Approval and Original Receipts:**

Employees are required to review potential professional development expenses with their immediate supervisor prior to the purchase. The immediate supervisor will assess whether the expense qualifies as an Eligible Expense in accordance with the Policy and these Guidelines.

Requests for expenses that are not covered by the Guidelines must be pre-approved by the requesting employees' Vice-President and in consultation with the Associate Vice-President, Human Resources.

Pre-approved Eligible Expenses must be submitted to the immediate supervisor for approval before submission to Financial Services for payment. Reimbursement claims and commercial card reconciliation reports must be supported by original receipts or electronic images.

If a dispute arises between a staff member and supervisor concerning the eligibility of a claim, the staff member may request, in writing, that the Association/University Committee established under the PEA Collective Agreement conduct a review of the application and the decision and, if appropriate, make a recommendation to the Vice President Finance and Operations, or designate. The VPFO's decision will not be subject to the grievance and arbitration procedures.

**Tuition Reimbursements:**

In circumstances where professional development funds were used for employment-related training and/or course fees, the Canada Revenue Agency advises that these amounts should not be claimed on income taxes as a personal tuition credit or education amount. For more information, consult the CRA webpage.

**Membership Fees:**

PDEA funds may be used to reimburse membership fees in learned organizations and professional organizations. Eligible employees may also apply to the Central Professional Development Fund for reimbursement of up to one (1) membership fee in a professional association or learned society where membership in a professional association or learned society is a condition of employment and therefore stated as a required qualification in the job description.

**Central Professional Development Fund:**

PEA staff eligible for a PDEA under Policy [HR6420](#) may also apply to the [Central Professional Development Fund](#) for funding assistance for specific professional development opportunities that cannot otherwise be funded.

Applications made to the Central Development Fund will be considered on a first-come, first served basis providing:

- The applicant's PDEA is already depleted; or
- The applicant's PDEA will become depleted as a result of this application and requires top-up from the Central Fund; or
- The applicant has not been granted funding from the Central Fund during the 12 month period preceding the current application.

**Assistance:**

For assistance with the application of this policy, please contact [Accounts Payable](#).