

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

See Policy: [HR6420](#)

Purpose:

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 1st of each year, full-time 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.

To be eligible to receive the PDEA entitlement, term PEA employees must have completed, within the academic year, three continuous years of service.

- The annual entitlement is calculated according to employment status in the academic year (July 1-June 30).
- This amount is prorated for:
 - a) individuals who have part-time positions in proportion to their appointment at July 1;
 - b) individuals employed for less than a full year, including individuals who declare their intention to retire or resign during the course of the academic year and those who take up appointments after July 1;
 - c) individuals on leave, other than maternity or parental leave, during the academic year; or
 - d) individuals with a sessional¹ appointment.
 - e) Individuals who have completed three continuous years of a term appointment after July 1.

Consequently, for example, employees retiring on June 30 receive no professional development while those who have declared their intention to retire on December 31 receive 50% of the current entitlement.

¹ Regular sessional appointments are defined as appointments with a predetermined layoff period in each year of the continuing appointment.

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, software, materials, page charges, reprints, interlibrary loan charges) directly associated with professional responsibilities; and
- d) equipment (e.g. computer equipment, including laptops, tablets, smartphones and audio-visual equipment) directly related to current duties and/or an approved learning/career development plan.

Additional Requirements:

Airfare: Economy class only.

Computer equipment: Requires [Technical Approval](#) from the Technology Solutions Centre.

Ineligible Expenses:

- Air travel cancellation insurance
- Big screen TVs
- Briefcases or luggage
- Business or first class travel
- Childcare expenses
- Voice and Data plans
- Digital or video cameras
- Entertainment expenses and gifts
- E-readers and MP3 players
- Fines, late or change fees
- Gaming systems
- Home internet fees
- Medical costs or prescriptions
- Monitors over 27"
- 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
- Recruitment expenses
- Salaries or honorariums
- Service costs for equipment
- Third party work, services or expenses
- Toner cartridges
- Travel costs of another individual
- Travel guide books

Prior Approval and Original Receipts

Claimants are required to review potential professional development expenses with their immediate supervisor prior to the purchase. The immediate supervisor shall assess whether the expense qualifies as an Eligible Expense in accordance with the Policy and these Guidelines. Requests to purchase items or equipment purchased following formal notice of resignation or retirement must be pre-approved in writing by the employee's Vice-President on the basis of a demonstrable benefit to the university.

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.

A claim for reimbursement for approved Eligible Expenses must be submitted to the immediate supervisor. Claims must be supported by **original** receipts.

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 cases of reimbursement of employment related tuition and/or course fees, the Canada Revenue Agency advises that an employee may not claim either the tuition credit or education amount to the extent they have been reimbursed.

When filing your tax return, please be aware of the following CRA conditions regarding the reporting of the amount received through the PEA Central Fund:

<http://www.cra-arc.gc.ca/tx/bsnss/tpcs/pyrll/bnfts/dctn/ttn-eng.html>

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.

Ownership:

Items and equipment purchased through the Professional Development Expense Account are the property of the University. Upon retirement or termination of employment assets acquired through the Professional Development Expense Account must be returned to the department. If the University is unable to re-allocate the assets the employee may purchase the assets at its current fair market value by contacting [Purchasing Services for an evaluation](#).

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; and
- The applicant has not been granted funding from the Central Fund during the 12 month period preceding the current application.

The 12 month limitation is the only exclusionary criteria. If an applicant has received Central Funds within the past 12 months, the application will not be considered. The remaining criteria is simply to assist the joint committee with ranking or prioritizing access to the Fund.

Assistance:

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