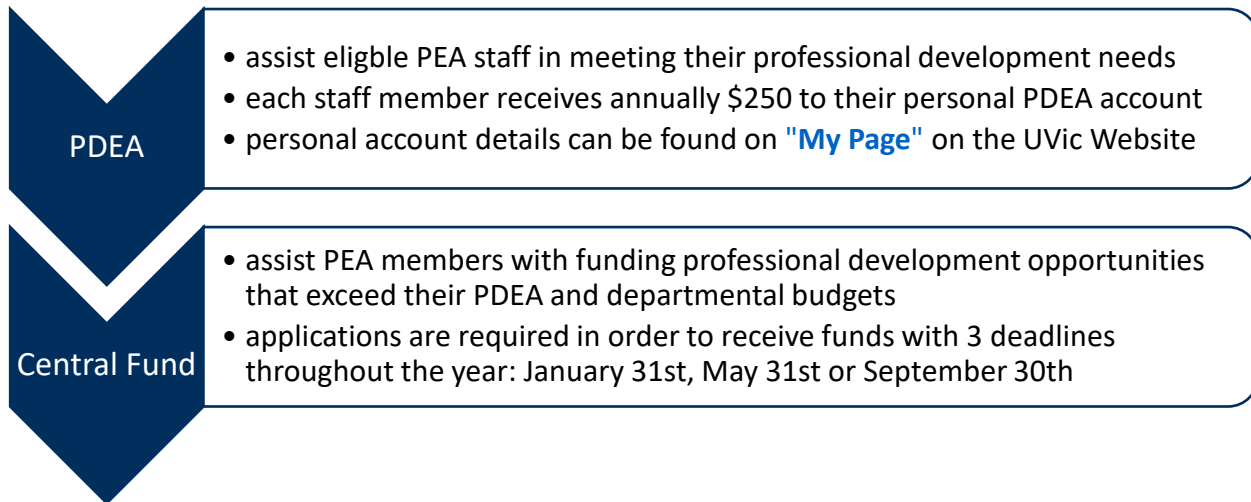


## PROFESSIONAL DEVELOPMENT AS A PEA MEMBER

Professional development includes activities that enhance a staff member's work performance, ability or effectiveness. The university provides funding to eligible staff through two means: Personal Professional Development Expense Account (PDEA) and a Central Professional Development Fund (Central Fund). Please see [HR6420 Policy](#) for more details.



## APPLYING FOR THE CENTRAL PROFESSIONAL DEVELOPMENT FUND

### BEFORE APPLYING

*Are you eligible to apply for Central Funds?* This is open to any regular, continuing PEA members at the University of Victoria, as well as term-employees who have completed 3 consecutive years of service. Employees must pass probation before applying.

*Should you apply for Central Funds?* Before submitting an application for Central Funds, check if one of the following applies to you. If YES, continue with the application. If NOT, connect with your supervisor, and explore your PDEA account first.

- ✓ Current personal account (PDEA) is depleted and/or you require additional funding to pursue a professional development opportunity.
- ✓ Some or all of your PDEA is being held for a legitimate purpose according to the [HR6420 Policy](#), section 2.00 'Eligible expenses' for PDEA, and has been approved by your supervisor.

*What is considered an 'eligible expense' for Central Funds?* Expenses eligible for reimbursement are:

- ✓ Travel (including accommodation), tuition, course or registration fees and other expenses for conferences, workshops of professional organizations and other similar activities;
- ✓ Up to one (1) membership fee in a learned society or professional organization; and
- ✓ Expenses (e.g., books, journals, materials, reprints, interlibrary loan charges) directly associated with professional responsibilities.

**Note:** as non-taxable benefits, items reimbursed from the Central Fund will remain the property of the University, including equipment, furniture or other physical assets.

*How much can you apply for?* The minimum application amount is \$250, with the maximum for pro-d activities undertaken at UVic being \$2,000, and \$1,500 for pro-d activities undertaken at external institutions. In exceptional circumstances, eligible expenses up to \$3,000 may be approved for pro-d activities at UVic. At least 1 item in your application must total over \$250CAD. You cannot combine smaller requests to reach the \$250 minimum.

*Have you received funding in the last 12 months?* Priority will be given to staff members who have not received funding from the Central Fund during the preceding 12 months.

## APPLY FOR CENTRAL FUNDS - COMPLETING AN APPLICATION PACKAGE

A complete application package will contain the following:



1. **Completed application form**, including signatures in appropriate form (wet, [digital](#) or attached email approval are acceptable)
2. **Printed copy of your personal Professional Development Expense Account (PDEA)**. Access your account through [Online tools](#) > Employee Services > Job Information > [Professional development account](#). Print using the link on the top right corner.
3. **Supporting documents about the professional development request**. This may include conference brochures, budget listings, event programs, and tuition fee printouts including reading lists.

Submit a complete application package either via email to [avphrassist@uvic.ca](mailto:avphrassist@uvic.ca), or as a hardcopy in person/or through intercampus mail to Human Resources before the deadline.

## AFTER APPLYING

*How do you know the status of your application?* 2-3 weeks after a submission deadline you will receive an email notification. If your application is approved, the message will include an approval letter with the tentative award and an explanation for the reimbursement process.

*How can you claim your approved professional development expenses?* To apply for reimbursement, create a package with the following documents:

1. Copy of the approval letter
2. All original receipts associated with the professional development opportunity

We encourage you to process your claim through [ChromeRiver](#). It is the most efficient way to both process and receive claims. You will find detailed instructions on your reimbursement on your approval letter. It is strongly recommended you create a copy of the reimbursement package for your own records.

You may instead prefer to make use of one or both of the [Business Expense Reimbursement Form](#) and [Travel Expense Reimbursement Form](#). Submit your reimbursement package, with copies of your receipts and any other supporting documentation, directly to Accounting Services at: [accountspayable@uvic.ca](mailto:accountspayable@uvic.ca).

# P.E.A. CENTRAL FUND | Application Form

Please ensure you have reviewed the [‘pro-d policies and procedures’ section for PEA](#) or the application guide prior to applying for PEA Central funds. Submit a complete application package either by email to [avphrassist@uvic.ca](mailto:avphrassist@uvic.ca), or in person/intercampus mail to Human Resources by the deadline January 31, May 31 or September 30<sup>th</sup> as applicable.

## DATE OF APPLICATION:

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## EMPLOYEE INFORMATION

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NAME (First, Last)			
EMPLOYEE # (V Number)			
JOB TITLE			
DEPARTMENT			
EMAIL		PHONE	
DATE OF LAST APPLICATION			

## PROFESSIONAL DEVELOPMENT EXPENSES

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TOTAL ESTIMATED EXPENSE of Professional Development Opportunity during this application period: \$ \_\_\_\_\_

<b>Personal Professional Development Expense Account (PDEA) contribution:</b> <input type="checkbox"/> <b>YES</b>   I'm allocating some or all of my PDEA funds to this request. PDEA account total: \$ _____ Amount from PDEA being allocated towards this professional development opportunity: \$ _____	
<input type="checkbox"/> <b>NO</b>   I'm holding all of my PDEA funds for a legitimate purpose according to the <a href="#">HR6420 Policy</a> , section 2.00 'Eligible expenses' for PDEA. <b>*ONLY</b> if 'NO' is selected is a supervisor signature required for the PDEA contribution section. Please note that wet signature, <a href="#">verified digital signature</a> or attached email approval is acceptable. Names typed into the form do not count as approval. Supervisor Name: _____ Supervisor Signature: _____	
<b>Department contribution:</b> <i>Total financial support allocated by your unit or department</i>	\$ _____
<b>Other contributions (if applicable):</b> <i>Total financial support from other funds/scholarships/personal contributions or benefits</i>	\$ _____
<b>Amount being requested from the PEA Central Fund:</b> <i>Min request \$250; max for pro-d activities at UVic \$2,000, max for pro-d activities external to UVic \$1,500</i>	\$ _____

## DESCRIPTION OF PROPOSED PROFESSIONAL DEVELOPMENT OPPORTUNITY

### ORGANIZATION NAME

Please provide the name of the institution/organization offering the (course/opportunity/event/program etc.) you are planning to undertake:

University of Victoria                      OR                       Other: \_\_\_\_\_

Event/Course name: \_\_\_\_\_

Event/Course location: \_\_\_\_\_ Date(s): \_\_\_\_\_

*\*If tuition request, please be specific of which semester(s)*

### DESCRIPTION OF EXPENSES

List and describe the break down of your expenses directly associated with this professional development opportunity, and the Central Development Fund application. Attach additional descriptions if necessary.

Example: *Tuition, course or registration fee, books, journals, materials - \$ Cost*

### BENEFITS

Describe the benefits to your role, department and the university from your participation/attendance at this professional development opportunity, and how it relates to your current work responsibilities. Attach additional descriptions of benefits if necessary.



**Remember: a complete application package must have appropriate signatures, attached a budget, program, or other supporting documents, as well as a printed copy of your PDEA Account details.**

\_\_\_\_\_  
PEA Member's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Department Chair/Head/Director

\_\_\_\_\_  
Date

**Note (1):** Wet signature, [verified digital signature](#) or attached email approval is acceptable. Names typed into the form do not count as approval.

**Note (2):** As non taxable benefits, any goods, books or equipment purchased from the Central Fund will remain property of the University. 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>