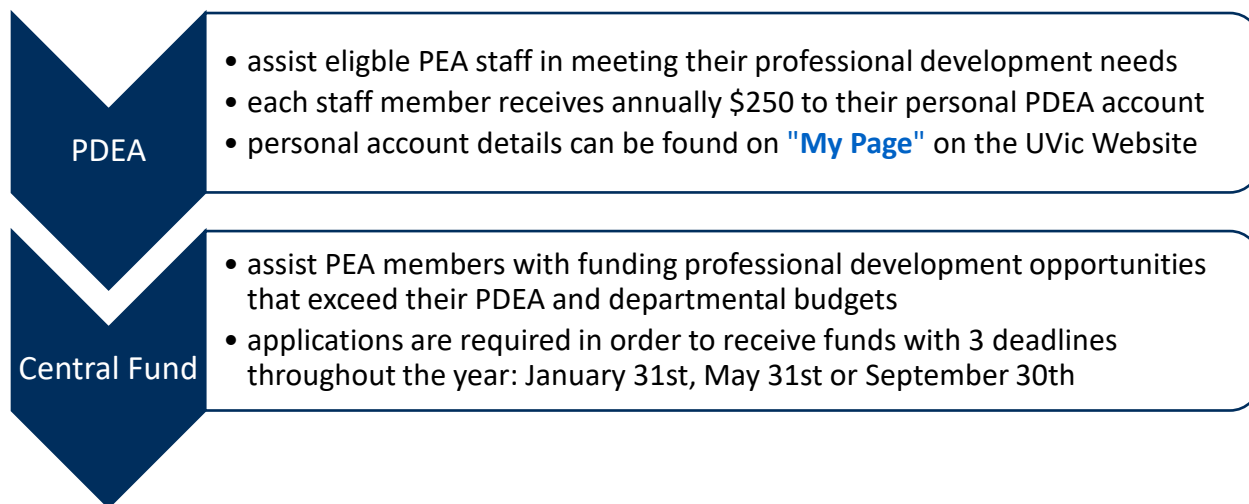


PROFESSIONAL DEVELOPMENT AS A PEA MEMBER

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.

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.

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**
2. **Printed copy of your personal Professional Development Expense Account (PDEA).** Access your account [here](#) or through 'Online tools' under 'Employee Services' option 'View pro-d account balance'. Select the pro-d category for PEA, and click on 'Display'. Print using the link on the top right corner.
3. **Supporting documents about the professional development event (brochures, budget, program, etc).**

Submit a complete application package either via email to 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
3. One or both of:
 - o [Travel Expense Reimbursement Form](#)
 - o [Business Expense Reimbursement Form](#)

Indicate on the form whether your expenses are to be reimbursed from your personal PDEA or the PEA Central Fund under 'Details or purpose of payment'.

It's is strongly recommended you create a copy of the reimbursement package for your own records. Submit your reimbursement package, with original receipts, **directly to Accounting Services** – either in person, or through intercampus mail.

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, or in person/intercampus mail to Human Resources by the deadline January 31, May 31 or September 30th as applicable.

EMPLOYEE INFORMATION

| | |
|---------------------------|--|
| Name: | |
| V00# | |
| Job title: | |
| Department: | |
| Email: | |
| Phone: | |
| Date of last application: | |

FOR COMMITTEE USE ONLY

AMOUNT APPROVED:

\$

PEA REP:

PEA REP:

UVIC REP:

UVIC REP:

PROFESSIONAL DEVELOPMENT EXPENSES

TOTAL ESTIMATED EXPENSES: \$ _____

| | | |
|---|--|-------------------------|
| Personal Professional Development Expense Account (PDEA) contribution: A. PDEA account total: \$ _____ B. Amount being allocated towards this professional development opportunity: \$ _____ C. Amount remaining in PDEA Account (A-B): \$ _____* <i>* if Line C does not equal "0", please see below:</i> | | Amount on item B: \$ |
| <p>*ONLY If some or all of your Personal Professional Development Expense Account (PDEA) is being held for a legitimate purpose according to the HR6420 Policy, section 2.00 'Eligible expenses' for PDEA, please have your supervisor confirm and approve this fact by signing here:</p> Supervisor Name: _____ Supervisor Signature: _____ | | |
| Department contribution: (total financial support allocated by your unit or department) | | \$ |
| Other contributions (if applicable): (total financial support from other funds/scholarships/personal contributions or benefits) | | \$ |
| Amount being requested from the PEA Central Fund: (min request \$250; max for pro-d activities at UVic \$2,000, max for pro-d activities at an external institution \$1,500) | | \$ |

DESCRIPTION OF PROPOSED PROFESSIONAL DEVELOPMENT ACTIVITY

Organization name: please provide the name of the institution/organization offering the (event/conference/program etc.) you are planning to undertake:

University of Victoria OR Other: _____

Event name: _____

Event location: _____ Date(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.

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.



Remember: a complete application package must have 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: As non taxable benefits, any goods, books or equipment purchased from the Central Fund will remain property of the University. 15/03/17.
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>*