

Professional Development Reimbursement (PDR)

53.36 Each eligible Member may claim reimbursement of eligible expenses up to a value of:

July 1, 2024: \$2,200

July 1, 2025: \$2,250

July 1, 2026: \$2,500

53.37 The pool of monies for allocation for PDR for a particular year (May 1st to April 30th), will be taken as of September 15th. To be eligible for PDR, a Member must hold a:

- a) Tenure-track/Continuing Appointment-track or Tenured/Continuing Appointment;
or
- b) Contractually Limited Appointment of one year or more.

53.38 For Contractually Limited Members and all other Members who are on an approved reduced workload NOT related to medical or human rights reasons, PDR shall be pro-rated in accordance with the Member's percentage workload.

53.39 For newly appointed Members hired after September 15th, a pro-rated amount calculated as: (Months remaining to April 30th from Date of Hire/12) x (Annual PDR Allocation) shall be made for the initial PDR fund allotted.

53.40 Members who are retiring or resigning shall receive in their year of retirement a pro-rated amount calculated as: (Number of months worked in final PDR year/12 x Annual PDR Allocation).

General Terms and Procedures:

53.41 PDR funds will be distributed to Members as per the terms of this Article.

53.42 Each eligible Member is allotted the sum (effective May 1 of each year for the duration of the Agreement) for Professional Development Reimbursement per fiscal year (May 1 to April 30). Reimbursement charged to this allotment must be for actual expenses incurred and must be supported by actual receipts consistent with established University reimbursement procedures. The use of these funds must relate directly to the Member's Teaching, Scholarship, Service, or Professional Practice under their general University responsibilities.

53.43 The exception to this is that one annual transfer to trust/research accounts will be permitted; however, the transfer must be for allowable expenses according to the current policy and a transfer must specify the items for which the funds have been expended.

53.44 Items purchased with these funds that have a continuing value remain the property of the University.

53.45 Items for which reimbursement may be claimed are restricted to the following:

- a) books, journal subscriptions;

- b) research equipment and instruments (including computer software or maintenance, personal computers and ancillary equipment, and typewriter or computer repairs and maintenance.);
- c) tuition/training fees which are related to the professional discipline of the Member;
- d) memberships in professional associations or learned societies;
- e) expenses related to travel for conferences and for Scholarship (such as registration fees for conferences, transportation costs, accommodation, meals);
- f) the premium cost of property insurance (such as that offered by CAUT) to protect professional material and equipment;
- g) the purchase cost of personal computers and ancillary equipment needed in the pursuit of University-related professional activities;
- h) up to \$100 to be used as a flexible allowance for out-of-pocket expenses associated with University recreational facilities (If used, this reimbursement is considered a taxable benefit by Canada Revenue Agency.);
- i) the cost of home internet provider services as an eligible expense subject to Canada Revenue Agency (CRA) regulations;
- j) open access journal publication fees for journals that are listed in the Directory of Open Access Journals;
- k) domain hosting fees.

Timing and payment of PDR:

53.46 Due to administrative costs it is hoped that Members would, whenever possible, submit one claim for the PDR, but no more than two (2) claims per fiscal year. Other variations regarding timing and payment of PDR include the following:

- a) Unused PDR up to a maximum of two year's full PDR may be carried forward to the next year so that a maximum of three year's PDR be available at any one time. At the start of any fiscal year (May 1), any unused PDR exceeding the two-year maximum will be allocated to the Library's acquisition budget.
- b) Each eligible Member may submit up to two claims for reimbursement within a fiscal year (May 1 to April 30) up to the maximum PDR, subject to the maximum carry-over provision. Such claims must be for actual University-related business expenses incurred and must be supported by actual receipts consistent with established University reimbursement procedures. Where eligible actual expenses exceed the PDR allocation in any fiscal year, individual Members may submit the residual expense amount consistent with established University reimbursement procedures in only the following fiscal year.
- c) Single purchase expenses (i.e., one-time out-of-pocket equipment or similar large expenses that exceed the annual PDR) may be carried forward for a maximum of three years for reimbursement. (Departments will maintain appropriate carry-forward records/receipts.)

- d) Two or more Members may submit a combined application for reimbursement, provided the specific uses of the funds are covered by this policy. Such a submission may be up to a maximum of $N \times \$PDR$ (N = the number of submitters)
- e) Subject to the approval of the appropriate Department Chair, Supervisor, or Director, Members may transfer to a colleague their entitlement for a particular year. Such a transfer must be based on the agreement that it will be reversed within a three-year period.