

Professional Development Reimbursement (PDR) (Excerpt from the Memorandum of Settlement between the University of Guelph and the University of Guelph Faculty Association (UGFA))

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

July 1, 2011: \$1700

July 1, 2012: \$1750

July 1, 2013: \$1800

To be eligible for PDR for a particular year (May 1st to April 30th), Members must, as at September 15th, hold a

i) Probationary or tenured/continuing appointment position; or

For Contractually limited Members and all other Members who are on an approved reduced workload which is NOT related to medical or human rights reasons, PDR shall be prorated in accordance with the Member's percentage workload.

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.

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:

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

2. 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 for actual expenses incurred and must be supported by actual receipts consistent with established University reimbursement procedures. 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. The use of these funds must relate directly to the Member's teaching, scholarship, service, or professional practice activities under his/her general University responsibilities.

3. Items purchased with these funds which have a continuing value remain the property of the University.

4. 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 faculty member/librarian;
- d) Memberships in professional associations or learned societies;
- e) Conference registration fees and travel;
- 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 may 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 Revenue Canada.)

**i) the cost of home internet provider services as an eligible expense subject to Canada Customs and Revenue Agency (CCRA) regulations.

Timing and payment of PDR:

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

- a) Unused PDR up to a maximum of a current year's full PDR may be carried forward to the next year so that a maximum of two 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 (\$3300 effective May 1, 2011 and \$3500 effective

May 1, 2013) 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 faculty members/librarians 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 two 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 or Supervisor, faculty members and professional librarians may transfer to a colleague his/her entitlement for a particular year. Such a transfer must be based on the agreement that it will be reversed within a three year period.