Professional Development Reimbursement Agreement

Eligibility

All faculty and professional librarians who are full-time probationary and tenured, or who are on full-time contractually limited term appointments of more than 12 months.

General Terms and Procedures:

1. PDR funds will be distributed annually to the Deans of Colleges, Directors of University Schools and the Chief Librarian on pro-rata basis, calculated according to the number of persons eligible in each unit.
2. Each eligible faculty member/librarian is allotted the sum of $1,550 (effective May 1, 2008) $1,600 (effective May 1, 2009), and $1650 (effective May 1, 2010) 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 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.
3. The use of these funds must relate directly to the faculty member's/librarian's teaching, research activities under his/her general University responsibilities.
4. Items purchased with these funds which have a continuing value remain the property of the University.
5. 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 ($2800 effective May 1, 2005) will be allocated to the Library’s acquisition budget.

b) Each eligible faculty member/librarian 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 faculty 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 x $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.

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