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## Professional Development Reimbursement, Professional & Managerial Staff

### U of G and PSA "Agreed to" item for renewal agreement 4 March 2015

#### Article XII- Professional Development Reimbursement

12.01 In the interest of staff development, the University provides a Professional Staff Development Reimbursement to all regular full-time professional staff and temporary full-time professional staff (hired for greater than 12 months) who are actively employed on September 15 each year.

The amount available is as follows:

- **Effective May 1, 2014: \$1,100**
- **Effective May 1, 2015: \$1,100**
- **Effective May 1, 2016: \$1,100**

#### Eligible Expenditures

Expenditures must relate to the staff member's scholarly and professional activities in the form of:

- a) books, manuscripts, subscriptions, equipment, software, instruments, or materials, all of which become the property of the University;
- b) tuition or fees for professional training courses;
- c) travel and costs for meetings or professional activities such as conferences;
- d) membership dues in professional associations or learned societies;
- e) scholarly assistance such as computer time;
- f) for 'wellness' in the workplace and other lifestyle benefits, 75% or \$200. (whichever is greater) of the cost of enrollment in one of the established consultative programs offered at the University of Guelph Health and Performance Centre or similar offerings available through the staff in the Athletic Centre. **As reimbursements under this clause constitutes a taxable benefit in accordance with Canada Revenue Agency rules/guidelines, all applications for reimbursement and supporting documentation must be submitted to Staff Relations for processing.**

#### Operation

- a) In each fiscal year the University will adjust Directorate and College budget allocations for the number of eligible professional staff.
- b) A claim year is the fiscal year of May 1 to April 30.
- c) An employee ~~may submit only one claim per year,~~ **will be permitted to submit no more than two (2) PDR claims each year,** using a Personal Expense Claim form, authorized by their Dean or Director, to Treasury Operations with

original receipts.

d) If an employee has a single purchase expense that exceeds the annual PDR, they may carry it forward for reimbursement for a maximum of two further years . Employees or departments must maintain the associated carry forward records and receipts. Nevertheless, employees may not carry unspent PDR funds forward to future years.

e) Two or more individuals may pool their PDRs for larger purchases. They may claim only for expenses in the current year.

f) This should be a reimbursement, whereby employees may only make claims after paying the expenses. In special circumstances employees may elect to purchase eligible goods/services on University contracts, in which case expenses may be charged directly to the University.

**g) A regular full time employee may request to "borrow against" the PDR allotment for the subsequent calendar year, to cover the cost of expenditures exceeding the annual negotiated PDR amount. Such requests shall be made in writing and are subject to the approval of the Chair/Department Head. It is agreed that an employee approved under this arrangement, who leaves the employ of the University for any reason, including resignation, retirement, or termination will be responsible for repayment of the Department in full for any PDR amounts advanced. Departments will be responsible for maintaining and tracking such arrangements.**

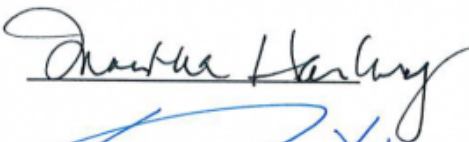

**(Note: The Parties Agree that clause G will not apply to 2013/14 PDR distribution, and will take effect as of May 1, 2015)**

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Notes: The numbering of Articles is subject to final review

Bolding and Strikethroughs as reflected for the purpose of highlighting changes only

For the University

For the PSA


Signed this Yea day of March 2015, in Guelph, Ontario, at 3:15 am/pm



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**Source**

URL:<https://www.uoguelph.ca/finance/professional-development-reimbursement-professional-managerial-staff>