Reimbursement of Professional Development Expenses for Members of the SFUFA Bargaining Unit

Preamble

Faculty members are required to pursue professional development activities in order to remain at the forefront of their respective disciplines. These activities may vary by discipline but may include the purchase of books, periodicals and subscriptions; memberships in learned societies and professional organizations; the purchase of equipment and intangibles associated therewith; travel expenses for study leave, conferences or other related activities and other expenses related to teaching, scholarship, and/or related academic activities.

Purpose

The purpose of the Reimbursement of Professional Development Expenses Policy is to reimburse members for eligible professional development expenses which relate solely to those activities which enhance an individual’s performance, ability or effectiveness as a teacher and a scholar at the University.

Definitions

Long-term member refers to those in the following categories: instructors, assistant professors, associate professors, professors, lecturers, senior lecturers, lecturers, laboratory instructors, librarians on continuing or probationary appointments; or limited term faculty, librarians, with an initial appointment of more than one year.

Recurring limited term member refers to limited term employees who have held SFUFA bargaining unit appointments totalling at least one year over a four year period.

Eligibility

1. Long-term full-time members who are employed at the University during a twelve month period - January 1 to the following December, are eligible for reimbursement of accountable professional development expenses in accordance with the schedule in Appendix I.

2. Recurring limited term members, long-term members with part-time appointments who are employed at the University during a twelve month period - January to the following December, are eligible for reimbursement of accountable professional development expenses on a prorated basis in accordance with section 10 below and Appendix 1.

3. Bargaining unit members on leave of absence without pay or long-term disability for an entire calendar year, are not eligible for reimbursement of professional development expenses.

4. Members may submit a claim for reimbursement of professional development expenses once per year between December 15 and January 15 for expenses incurred in the calendar year. If a member’s expenses exceed the balance of her/his professional development account in any given calendar year, the excess portion of expenses may be resubmitted by the member for reimbursement at the end of the subsequent calendar year. Members who retire, resign or are otherwise terminated, may submit a claim for reimbursement of professional development expenses in the last month of their appointment at Simon Fraser University.
5. Any unused balance in a member’s professional development entitlement account at the end of each calendar year will be carried forward into a subsequent calendar year. A maximum of 4 years’ entitlement may be accumulated in this manner.

6. Members may be reimbursed for their professional development expenses only. Expenses of other individuals are not eligible for reimbursement.

7. Any unused balance in a member’s professional development entitlement account at the end of a particular calendar year may not be paid to the member as salary.

8. No claim may be submitted, regardless of the date at which the expense was incurred, after the member has resigned, retired, or otherwise been terminated from the university.

9. Any unused balance in a member’s professional development entitlement account at the time of the member’s retirement, resignation or termination as an employee of the University shall revert to the University’s general operating budget. It is not transferable to another faculty member or to an administrative unit.

10. Prorating Schedule:
    For part-time members, the entitlement shall be prorated according to the employment status.
    For recurring limited term members, the entitlement is prorated based on the proportion of the appointment during the calendar year:
    e.g. A recurring limited term member who is employed full-time for two semesters, shall be eligible for 66.7% of the entitlement.
    e.g. A recurring limited term member who is employed half-time for two semesters, shall be eligible for 33.3% of the entitlement.

**Eligible Expenses**

The following expenses incurred by the member on his/her own behalf for professional development purposes are eligible to be reimbursed upon the presentation of receipts and the approval of the Director, Academic Relations:

a. travel and associated expenses related to meetings, conferences, study leave or other similar professional activities;
b. registration fees and other expenses for meetings of learned societies, other professional organizations, workshops, seminars and similar activities;
c. membership fees in learned societies and professional organizations;
d. fees and subscriptions for scholarly journals and books;
e. expenses directly associated with teaching responsibilities or current active research or professional programs which includes equipment such as computer hardware and software.

**Note:** As non-taxable benefits, all goods purchased through the Professional Development Expense Account remain the property of the University. After three calendar years from the date of purchase, the member has the option of purchasing these items from the University at fair market value. If the member retires, resigns, or is terminated as an employee of the University prior to the expiration of this three year period, the member will have the option of purchasing these items from the University at fair market value as at the date of such retirement or termination of employment.

The Professional Development Reimbursement is subject to Revenue Canada approval.
Procedure to Claim Reimbursement

1. Eligible members shall submit the Professional Development Claim Form to the Director, Academic Relations, in the Office of the Vice-President, Legal Affairs, for approval as an eligible expense under this Policy. The Claim Form must be accompanied by original receipts.

2. The Director, Academic Relations shall assess whether the expense qualifies as an eligible expense as described above.

3. Once approved, Professional Development Claim Form and receipts will be forwarded to Financial Services which will process the reimbursement.

Professional Development Claim Form available on the Academic Relations website.

Professional Development Reimbursement Information Sheet available on the Academic Relations website.

Interpretation

Section 14.1 of the Faculty Association Framework Agreement deals with matters of interpretation of the policy.

A 21.04
Appendix I

Professional Development Entitlement Scale

Effective January 1, 2005

Long-term, full-time members $1,600
Part-time members Prorated
Recurring limited term members Prorated

Effective January 1, 2006

Long-term, full-time members $2,000
Part-time members Prorated
Recurring limited term members Prorated

Effective January 1, 2007

Long-term, full-time members $1,910
Part-time members Prorated
Recurring limited term members Prorated

Previous Policies:

Subject Effective Date Expiry Date
Professional Development Allowance January 1, 1998 December 31, 1999
Professional Development Expense Reimbursement January 1, 2000 December 31, 2004
Professional Development Expense Reimbursement January 1, 2005 June 30, 2006
Professional Development Allowance Information