

Professional Development Funds
Guidelines and Procedures
Library/Co-operative Education Division

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I Background

Regular and Non-regular Type 2 Faculty are entitled to 21 PD days each year. Applications for days off to attend professional development (PD) do not come to this committee. Applications for PD funds do. PD days cannot be carried over from one year to the next. Requests for PD days (without funding attached) do not come to the PD Committee. Instead they go to the University Librarian or Director, Co-op.

All KPU faculty members are entitled to funding for professional development activities. The level is \$625 per year per 1 FTE. Administration of such funds is the responsibility of the elected PD Committee for each program/discipline grouping.

II Collective Agreement:

Allocation of PD funds is based on Article 16 of the collective agreement. It is intended to assist in *"...the maintenance and development of the faculty members' professional competence and effectiveness. It is agreed that maintenance of currency of subject knowledge, the improvement of performance of faculty duties, and the maintenance and improvement of professional competence, including instructional skills, are the primary professional development activities of faculty members."* (Article 16.03a) The proposed activity should be of benefit to the faculty member and the Employer.

(Some activities that would qualify for PD funding are: courses on computer programs or databases; library or University-related conferences; courses or conferences relating to a relevant field of study, etc. Before purchasing any books with PD funds, please check if the items are available at the Library and can be borrowed.

Entitlement:

Available funds are \$625.00 for each full-time equivalent faculty member, based on the staffing report of October 31st prior. Each faculty member will be informed, at the beginning of the fiscal year, of their fund allocation. This amount will be based on their previous fiscal year and projected current fiscal year FTE. The PD funds, including pool money, will be distributed in a fair and equitable manner within the confines of the available funds for that year. Extra funds, if there are any, will be pooled and distributed equally among all regular faculty members with the allocation for the new fiscal year.

Note: Members who begin regularly scheduled hours or leave replacement after the fiscal year has started, will not be given an allocation for that year. PD allocations, if there are any, for Type 1 faculty will be combined and distributed among all Type 1 faculty who worked during the fiscal year. Type 1 faculty who worked fairly regular shifts may be given a higher allocation than Type 1 faculty who only worked occasional shifts, the calculation of which is at the discretion of the PD committee

Any Faculty member on an unpaid leave of absence or on long-term disability for an entire calendar year is not eligible for Professional Development Reimbursement that year.

Elections:

According to the KPU Faculty Association collective agreement (Article 16.01b), election of the divisional PD committee shall occur every two years in February/March. At least three faculty members should be elected, including a committee chair. One member of the PD committee should be elected from the Co-operative Education Department faculty group. A member of the PD Committee shall also serve on the Educational Leave Committee.

<http://www.kpu.ca/sites/default/files/Human%20Resources/KPU-KFA%202014-19%20Collective%20Agreement%20%28signed%29.pdf>

III Duties of the PD Committee:

- promotes, within the group, activities that will enhance the academic, technical, and educational standards of the programs/disciplines
- keeps current the guidelines for the disbursement of professional development funds
- receives for recommendation faculty members' applications for PD funds
- determines the dollar figure for faculty members' annual PD allocation
- determines the distribution of PD pool funds at the end of the fiscal year

IV Duties of the PD Chair:

- communicates with faculty members, encouraging them to apply for PD funds and reminding them of the procedures
- keeps other members of the PD Committee informed about PD applications
- signs off on Professional Development Application Forms and Professional Development Expense Report Forms (A1039) and keeps a copy of the forms for the current and one previous fiscal year
- sends each member a notice of their allotment and total balance at the beginning of the fiscal year
- keeps track of each member's PD fund, the overall Library/Coop PD budget and any potential pool money
- In January/February each year, emails any faculty member who has a balance to ask if they wish to carryover their PD balance and reminds each member of the maximum \$1875 carry over allowance and/or if they have reached their maximum carryover that they will need to spend down their funds or contribute funds to the divisional pool, so as not to exceed \$1875.
- answers inquiries from members about PD funds, procedures and guidelines

V Other funding sources

There are other avenues for accessing funding for PD and for PD opportunities at KPU which are NOT overseen by the Library/Co-op Committee:

1. Personal PD funds, \$100.00 per year (available only to regular members and non-regular Type 2s) – overseen by the Kwantlen Faculty Association. Expense forms go directly to Finance. March 15 deadline.
2. .6% Faculty Professional Development Fund (\$1000.00 minimum) – overseen jointly by the Kwantlen Faculty Association and Management. Feb. 1; June 1; Oct. 1 deadlines. http://www.kpu.ca/sites/default/files/Research/0.6%25%20Faculty%20PD%20Fund%20-%20Guidelines_2.pdf
3. Educational Leave (80% of salary for 4 months-1 year) – overseen by the Educational Leave Committee. December 1 deadline.

VI Procedures for PD funding for faculty:

1. (Article 16.01 (f) of the Collective Agreement). Faculty who wish to apply for PD funds must complete a Professional Development Application Form and obtain signature from the PD Chair for approval of activity and determination of availability of funds. Depending on the faculty grouping, this form is then forwarded to the University Librarian or the Director of Co-op for signature for disbursement of funds. Approval will not be unreasonably withheld. If the administrator does not sign the request, the Chair of the PD Committee and the applicant shall be informed immediately and a reason shall be supplied. Once approved, the PD Chair forwards the signed request to Finance, and makes a copy for the PD files and for the requestor.

Note:

An individual Faculty member will not be approved for any total higher than is in their allocation.

Note:

Although it is standard practice for all PD applications to be approved prior to travel it is essential that PD application must be pre-approved prior to **International travel** for faculty who do **NOT** have Extended Health coverage through KPU. This is to ensure emergency travel coverage under the KPU Business and Travel Expense Policy/Procedures FM5(E6)

<https://www.kpu.ca/sites/default/files/Policies/FM5%20Business%20and%20Travel%20Expense%20Procedure.pdf>

In order to take advantage of the KPU Emergency Travel Insurance, Faculty employees on approved KPU business travel need to provide HR (Kathy Nolan) with:

- the approval document(s) from their University Librarian/COOP Director & PD Committee & the destination city, country and travel dates.

Note: a copy of the approved PD Application form will suffice as the above document as long as the destination city/country and travel to and from dates are clearly stated; send the copy of the PD Application form as soon as you receive approval so that HR will have ample time to process

Once this is received, HR will provide the employee with a memo outlining the specific information for the trip and the brochure outlining the conditions of the emergency travel insurance.

As confirmed by HR: The Faculty employee would be covered for the travel to the event and the days of the PD on KPU business. If the employee adds days after the PD event, they should have individual insurance for the rest of the trip including the travel day back to BC.

2. Applicants may ask for advance payment but advances are **not** issued for amounts less than \$200 and that Finance requires at least two weeks notice to issue an advance cheque. **(Advances will only be approved if the amount requested is currently in the member's individual balance).**

3. FORMS (Application and Expense):

<https://our.kpu.ca/resources/Forms%20of%20All%20Kinds/Forms/AllItems.aspx>

4. When the PD activity has been completed, a Professional Development Expense Report Form must be forwarded, along with original receipts, within 30 days of the event, to the PD chair, which is then sent directly by the Chair to Finance for payment.

Exception on Termination of Employment: If you plan to **retire, resign or your contract is ending**, you must submit your final Professional Development Reimbursement claim to PD Committee at least one month before the date of your resignation or retirement. No claims submitted after this date, irrespective of when the expenses were incurred, will be accepted.

5. Meal expenses incurred while away from the University at a PD Event will be claimed in accordance with University Policy FM5 (E6) Procedures <https://www.kpu.ca/sites/default/files/Policies/FM5%20Business%20and%20Travel%20Expense%20Procedure.pdf>. See Appendix 1 page 13 for breakdown of allowable amounts and restrictions.

Those rates are: breakfast – \$20, lunch - \$20, and dinner - \$35. The daily total may not exceed \$75 and must be included on the participant's PD expense report, along with applicable receipts. These rates do not apply to faculty members who are working on a PD project at home.

OR

Rather than applicants having to submit separate receipts for meal expenses incurred while away from the University at a PD event, a per diem rate that cannot exceed \$50 can be included on the participant's PD expense report. (Note that these rates do not apply to faculty members who are working on a PD project at home.)

Each individual can choose one method or the other when submitting and it can vary from PD event to PD event.

6. Expense amounts on claim form **must be listed in Canadian currency.**

For expenses paid for in currency other than Canadian \$:

1. If you paid in non-\$Cdn cash: Please use **the Bank of Canada converter** at: <http://www.bankofcanada.ca/rates/exchange/currency-converter/>
Input the date that matches the transaction date on the receipt, the amount and press the convert button. Record the equivalent Canadian amount onto your claim form, **print the conversion page and attach it to the claim with the relevant receipt. If the transaction date is a bank holiday, please use the next available date.**
2. If you paid by \$Cdn credit card: **claim the Canadian amount from your credit card statement**, and include a copy of the credit card statement as proof.
3. If you paid by non \$Cdn credit card: include a copy of the credit card statement showing date of payment, and complete the following using the **Bank of Canada converter** at: <http://www.bankofcanada.ca/rates/exchange/currency-converter/>
Input the date that matches the transaction date on the receipt, the amount and press the convert button. Record the equivalent Canadian amount onto your claim form, **print the conversion page and attach it to the claim with the relevant receipt.**
4. A complete claim consists of: the signed claim form filled in with eligible expenses and date expense was paid, all original receipts/proof of payment attached, and all expenses listed in Canadian currency as well as any GST or HST paid on Canadian receipts. Incomplete claims will be returned.
5. Please ensure your PDR Claim form is signed (original signature, no copies or scans) and includes all required supporting documents.
6. PDR reimbursement is directly deposited into the bank account on record for payroll purposes.

VII Maintenance of the PD Fund and Divisional Pool

1. Applicants who wish to attend a future PD event may choose to bank/encumber their PD funds up to a total of \$1875 (which is equivalent to the \$625 per FTE year for a period not exceeding 2 years plus current fiscal year.) **The PD committee must be notified in writing of this intention.**
2. In January/February of each year the PD Chair will email faculty who have a balance asking if they wish to carryover their funds or contribute to the divisional pool. If a faculty member reaches the maximum carryover of \$1875, they must expend an amount that reduces the amount below \$1875 or contribute any excess over \$1875 to the divisional pool.
3. By the end of March of each fiscal year, all monies uncommitted, unencumbered, or that have not been requested to be carried over will be considered part of the divisional pool.
4. Negative balances should not be incurred.

Note:

As confirmed by Finance January 2015, PD reimbursements are not considered a taxable benefit.

Useful Information but does not directly apply to PD funds:

See links below for KPU Business and Travel Expense Policy

<https://www.kpu.ca/sites/default/files/Policies/FM5%20Business%20and%20Travel%20Expense%20Policy.pdf>

Business and Travel Expense Procedures

<https://www.kpu.ca/sites/default/files/Policies/FM5%20Business%20and%20Travel%20Expense%20Procedure.pdf>

Brochure on KPU Emergency Travel Insurance can be found on the Library Sharepoint under Forms