

<b><i>FINANCIAL POLICY AND PROCEDURES</i></b>		<i>Instruction Number:</i>
<i>Subject:</i> Professional Development Allowance		<i>Date Issued:</i> Dec 22, 2006
<i>Title:</i> Professional Development Allowance - DFA		<i>Date Revised:</i> March 5, 2008
<i>Issued by:</i> Assistant Vice-President, Financial Services		<i>Approved by:</i> Vice-President, Finance & Administration

**Purpose:**

This policy and procedure addresses the establishment and administration of the Professional Development Allowance for DFA Bargaining Unit Members.

**Policy:**

1. Dalhousie will reimburse DFA Bargaining Unit Members for allowable professional related expenditures incurred by the Member which are not otherwise reimbursed from any other source, not claimed as an income tax deduction and which relate to the Member's responsibilities to the University. The maximum reimbursement will be determined in accordance with clause 32.20 of the Board/DFA Collective Agreement.
2. Allowable, professional-related expenditures are limited to the following:
  - a. membership fees for professional and/or learned societies,
  - b. subscriptions to professional and/or learned journals,
  - c. purchase of books, equipment and/or other items related to the Member's research or
  - d. registration fees for attendance at scholarly conferences,
3. A carryforward of unspent PDA is permitted as follows:
  - a. A member uses all of the 2006-2007 PDA amount of \$300 but only \$100 of the 2007-08 PDA amount of \$309. The leftover money from 2007-08 is rolled over for use at any time over the period of the new Collective Agreement (CA).
  - b. A member uses \$150 of the 2006-07 PDA amount of \$300, and \$50 of the 2007-08 amount of \$309. Only the left over money from 2007-08 (\$259) is rolled over for use at any time over the period of the new CA.
  - c. A member does not use any of the 2006-07 PDA amount of \$300 which then, in the terms of the last CA, gets rolled into the PDA for 2007-08 (now \$609). The member uses \$100 of this amount. The leftover \$509 gets rolled over for use at any time over the period of the new CA.
  - d. A member does not use any of the 2006-07 or 2007-08 PDA amount. The leftover \$609 gets rolled over for use at any time over the period of the new CA.

**Procedures:**

1. The Professional Development Allowance form (see below) must be properly completed and authorized with all appropriate documentation before being forwarded to Financial Services.
2. Members may apply once annually during the period January 1 to February 28 for reimbursement up to the maximum amount and shall attach original receipts and relevant information regarding their application. The Member's application shall be considered by the relevant Faculty-level committee or equivalent body pursuant to Clause 30.33 and, if approved, shall be reimbursed by the University.



**Professional Development Allowance  
Application/Cheque Requisition**

QPD  
Financial Services Use Only

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Financial Services Use Only

NAME (FIRST/LAST): \_\_\_\_\_

Dalhousie ID Number: **B** \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

Phone: \_\_\_\_\_

Date	Details Type of expense Please Attach Original Receipts	Receipt Number	Actual Receipt Amount (Cdn/Other)	Canadian Total Claimed Including GST/HST	Calculated GST/HST (see back)
			TOTAL	\$ -	\$ -

Currency: Cdn  US

Fund/Orgn (5 digits)	Account (4 digits)	Net Before GST/HST	GST/HST	Total
2 _____	8700	\$	+	
TOTAL AMOUNT OF PAYMENT				\$ -

**CERTIFICATION OF CLAIMANT:**

I certify that these expenditures are true and correct, that the whole expenditure is a proper charge against Dalhousie's funds, and that the amounts claimed have not previously been, nor will be, claimed or reimbursed to me by Dalhousie or any other organization, nor have or will be claimed as an income tax deduction.

\_\_\_\_\_  
**Signature of Claimant:**

\_\_\_\_\_  
**Date:**

<b>FACULTY-LEVEL COMMITTEE APPROVAL</b>			
Signature: _____		Date: _____	
Print Name: _____		Phone: _____	

<b>Financial Services Use Only</b>		Initial	Date
Address Type/Seq:	Vendor Clerk	_____	_____
FTMDISC Code:	Fund Admin	_____	_____

**Date Stamp (F/S Use Only)**

**PLEASE ENSURE THAT FACULTY-LEVEL COMMITTEE (OR EQUIVALENT BODY) APPROVAL IS OBTAINED PRIOR TO SUBMITTING APPLICATION TO FINANCIAL SERVICES FOR REIMBURSEMENT:**

**The following procedures apply:**

- (a) not made a previous claim in January 1st to February 28th time period.
- (b) been a Member during the period when expenditures were incurred.
- (c) made a claim for valid expenditures:
  - (i) related to their responsibilities
  - (ii) not otherwise reimbursed from any other source.
  - (iii) nor claimed as an income tax deduction.

**Allowable, professional-related expenditures are limited to the following:**

- a) membership fees for professional and/or learned societies,
- b) subscriptions to professional and/or learned journals,
- c) purchase of books, equipment and/or other items related to the Member's research or
- d) registration fees for attendance at scholarly conferences.

\*\* The organization code is to be completed by the applicable Faculty/Department/Unit.

\*\* The orgn code used must be from the Operating Special fund (i.e. 2xxxx)