

**ARTICLE 18                    PROFESSIONAL EXPENSE REIMBURSEMENT FUND**

- A. The University recognizes that the duty of faculty members, Professional Librarians and Professional Counsellors to maintain academic and/or professional competence and currency will, from time to time, necessitate the incurring of expenses.
- B. Recognizing that it is the principal beneficiary of such competence and currency, the University will establish a Professional Expense Reimbursement Fund (PERF) from which individual members of the Association shall be reimbursed for eligible expenses according to University policies and is strictly subject to the relevant provisions of the Income Tax Act and any interpretations made by the Canada Revenue Agency (CRA) regarding eligible expenses.
- C. Every faculty member is entitled to a reimbursement of \$2,000 for each July 1st of each year of this Collective Agreement; and thereafter, with any unused portion being carried forward to the following year unless the annual amount would put a faculty member's total PERF amount over the \$4,000 maximum. Then a faculty member would only be entitled to receive a pro rata amount up to the \$ 4,000 maximum.
- D. Notwithstanding paragraph C, allocation to a member's account may not result in the amount in the account exceeding \$4,000.
- E. Professional expenses include but are not limited to:
1. travel and associated expenses related to meetings, conferences, study leave or other similar professional activities, and eligible expenses not covered by or in excess of monies available from other funds for similar purposes;
  2. registration fees and other expenses for meetings of learned societies, other professional organizations, workshops, seminars and similar activities;
  3. membership fees in learned societies and professional organizations;
  4. books and subscriptions to scholarly journals;
  5. expenses directly associated with teaching responsibilities or current active research or professional programmes;
  6. academic/research assistants through administrative arrangements with the School/Department.
- F. Eligible members may submit their claim(s) at any point after expenses are incurred. Claims must be submitted at least once a year no later than July 1st.

- G. Pre-approval is not required for Professional Expense Fund claims.
- H. All goods purchased through the Professional Expense Reimbursement Fund remain the property of the University. If a member wishes he/she may purchase these items from the University after four (4) years at fair market value, as determined by the University.
- I. Upon commencement of employment all newly hired faculty will receive the full annual reimbursement amount. A faculty member must have worked a minimum of 6 months to receive their next annual reimbursement on July 1st.
- J. Retiring or terminating faculty are not entitled to cash out any unused portion of their PERF upon separation from the University. A faculty member retiring on August 31 or June 30 of any year shall not be entitled to an allowance for the year commencing on July 1 of the year of their retirement.
- K. Faculty members on long term disability or on a leave of absence without pay are not entitled to accrue professional expense funds. They may be reimbursed for professional expenses incurred during the first year of their absence from work. Any remaining money in a faculty member's account will be retained until they return to work, as long as the total amount does not exceed \$4,000.