

October 1, 2011

Dear TRUOLFA Members:

On behalf of the TRUOLFA Professional Development Committee, we are writing to clarify what you need to know and do in order to make your application for PD funds and approval of such funds more seamless.

There are **three** parts to the process. They are as follows:

**First**, go to the TRUOLFA website at

[http://www.truolfa.ca/assets/documents/pd\\_application\\_form\\_modified.doc](http://www.truolfa.ca/assets/documents/pd_application_form_modified.doc) and download or print a PD application form. Fill out the form and remember to include a detailed rationale for PD funds. You must also explain how your activity benefits both you and TRUOL. If you are asking for two year funding, please indicate so. If you are requesting an advance of half of what you are asking for, please indicate so. The maximum advance for two years funding is \$1,000. Email your application to John Patterson at [jpatterson@tru.ca](mailto:jpatterson@tru.ca) and he will then pass your application on to the PD Committee. He will then notify you as to whether your application is successful or not. If you have questions, contact him at TRUOL local 6965 or a [jpatterson@tru.ca](mailto:jpatterson@tru.ca). Typically, funding decisions are made in a timely fashion, although reimbursement, upon approval, can take as long as six weeks as the PD Committee does not meet on a regular basis.

**Secondly**, after approval and completion of a PD activity, you must send an itemized account of your expenses and a PD report of 125 to 200 words to John Patterson at the above address. In order for your reimbursement to be processed, you must include original receipts, not credit card statements, scanned PDF files, Xerox copies, etc. Meals may be claimed at the daily rate as outlined on the PD form and thus no receipts are required. Mileage rates are TRU's current mileage rates, which you can access from the TRU website at [http://www.tru.ca/\\_shared/assets/Travel\\_Expenses5597.pdf](http://www.tru.ca/_shared/assets/Travel_Expenses5597.pdf). Please itemize and add all expenses on a separate piece of paper. Please convert all foreign currency to Canadian dollars and attach your original receipts to the piece of paper.

**Thirdly**, include your detailed PD report. Afterwards, send in your receipts and PD report together, not separately, to John Patterson at 309-1082 West 8<sup>th</sup> Avenue, Vancouver, BC V6H 1C4

In addition to the process application for reimbursement, the PD Committee wants you to note the following important points:

## CLAIMABLES

1. You may claim the daily meal per diem. (For current rates go to [http://www.tru.ca/\\_shared/assets/Travel\\_Expenses5597.pdf](http://www.tru.ca/_shared/assets/Travel_Expenses5597.pdf) Do not send in meal receipts.
2. You may claim up to a maximum of \$250 per night for accommodation unless you stay in a private residence where upon you may claim up to \$40 per night. Please show discretion.
3. You may claim up to \$80 per day for a car rental if your PD activity is more than 200 kilometers from your residence. You may also claim for fuel provided you provide original receipts.

## UNCLAIMABLES

1. You may not claim over \$250 a night for accommodation without prior approval.
2. You may not claim over \$80 a day for car without prior approval.
3. You may not claim personal long distance phone calls.
4. You may not claim incidentals like entertainment, liquor bills (including use of minibars), and side trips.
5. You may not claim over \$40 per night if you stay at a private residence.
6. You may not claim valet parking.
7. You may not claim books, computers, software, Internet expenses, etc. Check with TRU regarding their computer purchase/rental policies. See TRU's application form for what you may or may not claim.
8. You may not claim any car expense (gas and mileage) related to driving to an event or activity that exceeds the cost of an economy – not business, first class, etc. – flight is not claimable unless prior approval is given. For example, if it costs \$350 to fly return to Los Angeles to attend a PD event or activity, but you decide to drive to Los Angeles instead and your total expenses are over \$350, you only be reimbursed \$350. Otherwise, you may claim mileage at TRU's current mileage rate .
9. You may not claim travel insurance.
10. You may not claim for costs associated with self-published books, etc.
11. You may not claim expenses outside the time frame claimed and approved of. For example, if you go to a three day conference that runs from May 10-12 in San Diego and you stay two weeks you can not claim expenses for the extra days you spent in San Diego. You may, however, claim hotel, meal, and travel expenses one day prior to and after an event. In this case May 9 and 13<sup>th</sup>.

## POINTS TO NOTE

1. When applying, be sure to include a clear and significant rationale as to how your PD activity benefits you and TRU.
2. If you have been given approval for two years of funding (a maximum of \$4,000), you will be reimbursed one year at a time. In other words, you will be reimbursed \$2,000 in year one and \$2,000 in year two. You cannot apply for two years worth of funding within five years of receiving two years worth of funding. If requested, you will only be given an advance of \$1,000.
3. You may ask for an advance of half of what you have been approved for. For example, if you plan to take some courses at UBC and are claiming a full year of expenses (\$2,000), you may ask for an advance of \$1,000 before you actually register for the courses. In the case of two-year funding, you will only receive \$1000 maximum as an advance.
4. The PD Committee uses the fiscal year (April 1-March 31), when determining application eligibility.
5. PD funding is not retroactive. The PD Committee will not consider PD applications for past activities in which you have participated.
6. PD funding is for TRUOLFA members only and cannot be applied to travelling companions.
7. If you do not provide all of the required information needed to process your claim, your claim will be returned to you. Be sure to include original receipts, a PD report, and the PD reimbursement form. A receipt that does not indicate specifics may not be claimed. Please itemize your expenses and convert foreign currency to Canadian currency at the time you pay for an expense. Be sure to include your full address on the form. Include your postal code!
8. If you have incurred expenses prior to your activity and are unable to complete the activity due to personal and/or medical reasons, you will not be reimbursed. The PD Committee suggests you purchase travel cancellation insurance.
9. Make a copy of all your original receipts in case your receipts are lost. The PD Committee is not responsible for lost receipts.
10. Should you be given an advance that you have cashed and decide later not to attend the activity for which you have been given an advance, please write a cheque for the full amount in care of TRUOLFA and send it to John Patterson at the address below. Do not make it out to the PD committee or any one representative.

If you have any questions, please contact John Patterson at TRU local 6965. Mail or email your application to John and, upon completion of your PD activity, your original receipts and PD report to John at 309-1082 West 8<sup>th</sup> Avenue, Vancouver, BC V6H 1C4

Sincerely,

Your PD Committee:

John Patterson, TRUOLFA Representative

Don Sinclair, TRUOLFA Treasurer

Valerie Peachey, TRU Representative