# TRUOLFA Professional Development Application Form

This form should be filled out online and emailed to the PD Director: pd@truolfa.ca

| | |
|---|---|
| OLFM Name: | |
| TRU ID: | |
| Today's Date: | |
| **Previous Funding:**<br>Did you receive funding for an another PD application in the the current PD Fiscal Year? ☐ Yes ☐ No<br>What amount did you receive? $<br>**The difference between what you received previously and your current request is the maximum that you could request for this application.** | Street Address:<br>City:<br>Province: BC<br>Postal Code: |
| Home Phone:<br>Cell | Funding Year ☐ Apr1/27 - Mar 31/28<br>Funding Year ☐ Apr 1/ - Mar 31/<br>Select the Funding Year - enter the year *** |
| **PD Activity Title, including website of event if applicable- and append to the application supporting documentation defining the nature of the PD activity** | . |
| PD Activity Dates: | |
| Location of PD Activity: | |
| Have you completed the six months probationary period since the allocation of your first student? | ☐ Yes ☐ No |
| Your PD Role or Purpose:<br>(Eg: presenter, participant, student, etc.) | |
| If your PD is approved, **would you want an advance of 50%?" Each request for an advance is made on a case by case basis and and not guaranteed and subject to the cash in our current account.** | ☐ Yes ☐ No |

List only the active OL courses that you have delivered in the last six months. Do not list courses previously taught but which have been discontinued, or courses you are no longer scheduled to deliver in the next six months.

| | |
|---|---|
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**To be eligible for PD Funds, you must be in good standing and have paid dues for six months prior to application.**

**In the last six months, how many students are presently registered in your OL courses? (check the relevant category)**

| Registered students* | | PD Fund Eligibility (CAD $) |
|---|---|---|
| **10**-15 | ☐ | 500 |
| 16 - 35 | ☐ | 1000 |
| 36 - 55 | ☐ | 1500 |
| 56-75 | ☐ | 2000 |
| 76-95+ | ☐ | 3000 |

***The total number of your registered students is shown in the Course List (truemployee.tru.ca)**

***** If you have exhausted your available PD Fund Eligibility in the current PD Fiscal year, future PD applications will not be accepted until April 1 of the new PD Fiscal year.**

Please write a brief statement outlining the purpose of the PD

Please outline the benefits that you will gain from your attendance or participation.

Please outline the benefits that TRU-Open Learning will gain from your attendance or participation.

| *Estimated Expenses* | *Itemization of Expenses* | **All figures and amounts must be expressed in Canadian dollars at the pertinent exchange rate where relevant** |
|---|---|---|
| Registration and Tuition Fees | (If registration/tuition, etc. are in foreign currency, indicate below the foreign rate here and then provide the exchange rate into CAD$)<br>Fees _________ Exchange Rate _________ | _______________ |
| Total Per Diem | Record amount from page 4 | _________________ |
| Daily Accomodation<br>**(See note below for additional information)** | With Relatives ______ days at $40<br>Hotel Accomodation** ______ nights | _______________<br>_______________ |
| Travel By:<br>*** Attach mileage support (ie. Mapquest/google map printout)**<br>**The Fund does not pay for Cancellation insurance.** | Pavement _________ kilometers x $0.50 CAD*<br>Pavement _________ fixed rate<br>Air _________<br>Please note that you cannot claim for travel insurance | _______________<br>_______________<br>_______________ |
| Other Travel Expenses: | Vehicle Rental<br>Vehicle Rental Fuel<br>Other Transportation (parking, taxi, bus, ferry, etc.) | _______________<br>_______________<br>_______________ |
| Total Expenses | | |
| Less funding from other sources | Other Institutions, including TRU _______________ | _______________ |
| Net TRUOLFA PD Request | | |

** **The maximum amount that can be claimed in Canada for hotel accommodation per night is C$300.00 (excluding hotel fees and taxes) and outside of Canada the maximum that can be claimed is US$350.00 per night (excluding hotel fees and taxes).**

**Estimated Per Diem**
**Meal Expenses**

| Per Diem | | In Canada | International | Total CAD$ | Total USD$ | EX Rate | Total Claim CAD$ |
|---|---|---|---|---|---|---|---|
| Full Day | ___ days | CAD $ | USD $ | | | | |
| | | 60.00 | 70.00 | | | | |
| Breakfast | ___ days | CAD $ | USD $ | | | | |
| | | 12.00 | 15.00 | | | | |
| Lunch | ___ days | CAD $ | USD $ | | BC | | |
| | | 18.00 | 20.00 | | | | |
| Dinner | ___ days | CAD $ | USD $ | | | | |
| | | 30.00 | 35.00 | | | | |
| Incidentals | ___ days | CAD $ | USD $ | | | | |
| | | 10.00 | 10.00 | | | | |

Total Per Diem Expense: CAD $ ____________

(Record on the previous page)

Daily Meal Allowance

*In Canada travel:
Full day per diem CAD$60.00
Breakfast per diem CAD$12.00
Lunch per diem CAD$18.00
Dinner per diem CAD$30.00
Incidentals per diem CAD$10.00

*Outside Canada Travel
Full day per diem USD$70.00
Breakfast per diem USD$15.00
Lunch per diem USD$20.00
Dinner per diem USD$35.00
Incidentals per diem USD$10.00

**Receipts for meals are not required if per diem is used

**Convert all foreign currency to Canadian dollars using the Bank of Canada exchange rate**

**Write the exchange rate in the EX Rate column**

**I certify that this PD request is expressly required for TRUOLFA PD purposes and complies with TRUOLFA Policies and is unrelated, in part or whole, to support professional development required by another Employer or Post-secondary institution. I further certify that the application is for the PD fiscal year identified above on page 1 of this application, and authorize TRUOLFA to adjust my claim where applicable.**

Signature: Date:

# Notices

**Faculty can claim reimbursement for professional development expenses that enhance the performance, ability, or effectiveness of a member's work at the University.**

**The funds are to be used for expenses directly associated with a member's own professional activities while holding an <u>active position</u> as a TRUOLFA Faculty Association member, and <u>having paid union dues for six months prior to the application for PD funding</u>, and <u>having students currently registered in their TRU Open Learning courses.</u>**

**Proration:**

**The Eligible PD amount is prorated for new members who have a hire date during the current funding year (other than a April 1 hire date) .**

**The Eligible amount is prorated for members who have an appointment end date prior to March 31 of the current funding year.**

The PD Committee will not consider PD applications for fees incurred and paid before a request for funding has been presented, or past activities in which you have participated before requesting funding. Requests for funding must be presented for the pertinent PD fiscal period. **All PD requests are tentatively approved at the requested amount, but reimbursement and final payment is calculated in accordance with the conditions identified below and supporting receipts.**

If the PD activity takes place while the member is on leave between active appointments, the application will be denied. Applications will be accepted and considered only when the member has returned to an active appointment.

Funding requests are approved on a first-come, first-served basis and are subject to the availability of the annual budgeted funds. If overall funding is exhausted in any one year, Open Learning Faculty Members will be notified that no further applications will be approved until the fund renewal in the following TRU fiscal year. **TRUOLFA reserves the right to change without notice the value of PD Fund Eligibility.**

## Eligible expenses include:

a) Travel and associated expenses related to meetings, conferences, or other similar professional activities as outlined in: https://www.tru.ca/shared/assets/Travel_Expenses5597.pdf

b) Registration fees and other expenses for meetings of learned societies, other professional organizations, workshops, courses, seminars, and similar activities

c) Fees and subscriptions for journals related to your subject area

d) Membership fees in learned societies and professional organizations

e) Travel and other expenses related to research activities & undertakings, including costs and billings related to final editing of research materials

## Ineligible expenses include (but are not limited to):

a) Required training to meet job requirements in an Open Learning Faculty Member's current position

b) **Tuition and/or** ancillary student fees **related to** credit courses, **programs or degrees**

c) Software

d) All electronic devices and any associated data plans (**computers**, laptops, e-readers, tablets, cell phones)

e) Claims of $300+ a night for accommodation without prior approval. **Resort fees are not claimable**

f) Claims for over $80 a day for car rental without prior approval

g) Claims for personal long distance phone calls

h) Claims for incidentals like entertainment, liquor bills (including use of minibars) and side trips,

i) Claims for 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 unless prior approval is given (**Evidence of flight/airfare cost must be presented in advance)**

j) Claims for valet parking, **car insurance, traffic violations and related expenses**

k) Claims for travel insurance, additional baggage costs or expenses related to travelling companions

l) Costs associated with self-published books, etc.

m) Claims for expenses outside the timeframe of the PD approved (i.e. more than one day either side of the PD activity) without prior approval

n) Claims for expenses of travelling companions

o) **Claims for postage, courier or other costs pertaining to submitting the PD Application or submission of the claim form and receipts for reimbursement of expenses.**

## TRUOLFA Professional Development Reimbursement Request Form

To be completed and mailed to John Patterson within one month of completion of PD activity.

| | |
|---|---|
| OLFM Name: | |
| TRU ID: | |
| Today's Date: | |
| **Previous Funding:**<br>**Did you receive funding for an another PD application in the the current PD Fiscal Year?** ☐ **Yes** ☐ **No**<br><br>**What amount did you receive? $**<br>**The difference between what you received previously and your current request is the maximum that you could request for this application.** | Street Address:<br><br>City:<br>Province: BC<br>Postal Code: |
| Telephone: | Home:<br>Cell:<br>VOIP: |
| PD Activity Title:<br>(Include website of event if applicable) | |
| PD Dates: | |

PD Fiscal Year March _____to April ______

**Write the year after March and April, ex. March 2026-April 2027**

Please write a brief statement outlining the purpose of the PD

Please outline the benefits that you gained from your attendance or participation.

Please outline the benefits that TRU-Open Learning gained from your attendance or participation.

**All figures and amounts must be expressed in Canadian dollars at the pertinent exchange rate where relevant**

| ***Actual Expenses*** | ***Itemization of Expenses*** | **CAD$** |
|---|---|---|
| Registration and Tuition Fees | (If registration/tuition, etc. are in foreign currency, indicate below the foreign rate here and then provide the exchange rate into CAD$)<br>Fees _________ Exchange Rate _________ | ___________ |
| Total Per Diem | **Record the Amount from Page 9** | ___________ |
| Daily Accomodation<br>**(See note below for additional information)** | With Relatives ______ days at $40<br>Hotel Accomodation ** ______ nights<br>Hotel Fees, taxes nights | ___________<br>___________ |
| Travel By:<br>* Attach mileage support (ie. Mapquest/google map printout)<br>The Fund does not pay for Cancellation insurance. | Pavement _________ kilometers x $0.50 CAD*<br>Pavement _________ fixed rate<br>Air _________<br>Please note that you cannot claim for travel insurance | ___________<br>___________<br>___________ |
| Other Travel Expenses: | Vehicle Rental<br>Vehicle Rental Fuel<br>Other Transportation (parking, taxi, bus, ferry, etc.) | ___________<br>___________<br>___________ |
| Total Expenses | | |
| Less funding from other sources | Other Institutions ___________<br>TRUOLFA Advance ___________ | ___________<br>___________ |
| Net TRUOLFA PD Request | | |

** The maximum amount that can be claimed in Canada for hotel accommodation per night is C$300.00 (excluding hotel fees and taxes) and outside of Canada the maximum that can be claimed is US$350.00 (excluding hotel fees and taxes).

**Actual Per Diem Meal Expenses**

| Per Diem | | In Canada | International | Total CAD$ | Total USD$ | EX Rate | Total Claim CAD$ |
|---|---|---|---|---|---|---|---|
| Full Day | ___ days | CAD $ | USD $ | | | | |
| | | 60.00 | 70.00 | | | | |
| Breakfast | ___ days | CAD $ | USD $ | | | | |
| | | 12.00 | 15.00 | | | | |
| Lunch | ___ days | CAD $ | USD $ | | | | |
| | | 18.00 | 20.00 | | | | |
| Dinner | ___ days | CAD $ | USD $ | | | | |
| | | 30.00 | 35.00 | | | | |
| Incidentals | ___ days | CAD $ | USD $ | | | | |
| | | 10.00 | 10.00 | | | | |

Total Per Diem Expense: CAD $ ____________

(Record on the previous page)

Daily Meal Allowance

*In Canada travel:
Full day per diem CAD$60.00
Breakfast per diem CAD$12.00
Lunch per diem CAD$18.00
Dinner per diem CAD$30.00
Incidentals per diem CAD$10.00

*Outside Canada Travel
Full day per diem USD$70.00
Breakfast per diem USD$15.00
Lunch per diem USD$20.00
Dinner per diem USD$35.00
Incidentals per diem USD$10.00

**Receipts for meals are not required if per diem is used

**Convert all foreign currency to Canadian dollars using the Bank of Canada exchange rate**
**Write the exchange rate in the EX Rate column**

I certify that I have not and will not claim reimbursement for these expenses from any other source and further confirm that the information provided in this application is correct.

| OLFM Signature | Date |
| --- | --- |
| | |

Please print off and mail your reimbursement request (pages 7-11) with your **original** receipts and report to:

John Patterson
309 - 1082 W. 8th Ave.,
Vancouver, B.C.,
V6H 1C4

A reimbursement cheque covering approved expenses will be prepared and set to you once your report and receipts are received. Please do not email any reciepts.

If the successful applicant does not submit all receipts and PD reports with the required one month, the OLFM must return any advance payment to the *TRUOLFA PD Fund.*