

TO: All MUNFA Members

FROM: The MUNFA Executive Committee

DATE: February 4, 2015

SUBJECT: Professional Development and Travel Expense Reimbursement (PDTER)

Clauses 31.55 - 31.64 of the Collective Agreement outline the parameters of the PDTER Fund for MUNFA Bargaining Unit Members. The PDTER is \$1600 per year for expenses incurred in any one (1) fiscal year.

*The University shall provide Professional Development and Travel Expense Reimbursement (PDTER) for each regular term appointment, tenure track or tenured ASM and *probationary or permanent Coordinator who is employed as of April 1 at this University.*

Please note that the fiscal year is April 1st - March 31st and that receipts for claims must be dated within the same fiscal year as the claim is filed; receipts cannot be carried over and reimbursed in future years. Instead, unused funds can be carried over into the next fiscal year. ASMs are therefore encouraged to delay large purchases until their PDTER balance (an entitlement of up to \$4800 can be accumulated) will cover the entire cost of their professional development purchase. Reimbursement for **non-travel related** expenses can be requested **twice in a fiscal year** (Clause 31.59).

Requests for **travel-related expense reimbursements** must be in accordance with the Travel Guidelines-General TI and be **submitted within ten (10) working days of trip completion**. ASMs are advised that if your travel spans two fiscal years (eg. March/April), resulting in receipts from two separate fiscal years, that you contact Financial & Administrative Services prior to travelling regarding procedures to facilitate the use of the PDTER for this travel and acceptance of receipts for that particular claim.

There is also a Professional Development and Travel Fund for *Teaching Term Appointments* (see Clauses 31.65-31.67) whose letter of appointment states that the appointment is for twelve (12) months or longer, in the amount of \$800.

You may also reference IB2013/14:08 (<http://www.mun.ca/munfa/IB/2013-14/ib131408.pdf>) which was circulated November 19, 2013 regarding “internet enabled communications device (e.g. tablets, smart phones, Blackberries, iPhones, etc.)”.

*Clause 31.53 varied as per MOU signed on June 23, 2010.

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Date: November 19, 2013
Subject: Professional Development and Travel Expense Reimbursement (PDTER) Fund

As the result of the settlement of a number of grievances dating as far back as 2011, MUN and MUNFA have recently signed a Memorandum of Understanding (MOU) that makes smart phones and any accompanying service plans an eligible expense under the Professional Development and Travel Expense Reimbursement (PDTER) Fund provisions of Clause 31.54 in the Collective Agreement.

Effective April 1, 2013 the purchase of any "internet enabled communications device (e.g. tablets, smart phones, Blackberries, iPhones, etc.)" is an allowed expense under Clause 31.54 of the Collective Agreement. Like other computer-related equipment referenced in Clause 31.54 (a), the device will remain the property of MUN.

The MOU then goes on to describe how the PDTER Fund will cover a percentage of a monthly service plan that an ASM declares was used for professional development for a device such as a smart phone. In short, the university will not reimburse any portion of a monthly service plan that is for personal use. If an ASM claims that the smart phone usage was 100% professional, MUN will reimburse 100%; if an ASM claims the device was used only 50% of the time for professional development, the university will only reimburse 50%. The most important limitation to note is that MUN will only reimburse the requisite percentage of the monthly basic service amount. MUN [apparently guided by Canada Revenue Agency (CRA) limits] will not reimburse extra charges, such as extra data downloads, or other accessories such as voice mail, text messaging, etc., that are ad hoc additions to a monthly plan.

The challenge for any ASMs wishing to avail of this new option under the PDTER Fund, therefore, is to ensure that they only agree to a basic service contract that addresses all their needs into the foreseeable future. In other words, be sure to consider what might be sufficient data download limits, and other features such as text messaging and voice mail necessary for your professional development. The employer is willing to reimburse an ASM under Clause 31.54 only if these features are used for professional purposes, and are aspects of a monthly plan, but not if they are for personal use, or extra charges in any one month.

The university has developed a form to aid ASMs in reporting PDTER Fund reimbursement claims for service contracts. While use of such a form is not mandatory, ASMs should be able to obtain an example from their Dean or Administrative Head.

If you have any further questions on this issue, please contact the MUNFA Office at munfa@mun.ca or 864-8642.