

# TRUOLFA

Dec 31, 2018

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 two parts to the process. They are as follows:

First, go to the TRUOLFA website at [http://www.truolfa.ca/prof\\_development.html](http://www.truolfa.ca/prof_development.html) and download and print out the completed application providing a detailed rationale for PD funds.

You must also explain how your activity benefits both you and TRUOL. If you are requesting an advance of half of what you are asking for, please indicate so. Email your application to John Patterson at [jpatterson@tru.ca](mailto:jpatterson@tru.ca) who will then submit it to the PD Committee.

After the application is reviewed you will be notified whether your application is successful or not. If you have questions, contact him at TRUOL local 6965 or at [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 copy of your PD report of 125 to 200 words to John Patterson at the above address within 45 days of your activity's end date. The second half of the application form serves as the reimbursement form where you can write out your report and itemize your expenses. 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. Be aware that the daily rates for U.S. and international travel are higher. The daily meal rates (Canada and International) and mileage rates are identified on TRU's site:

[http://www.tru.ca/\\_\\_shared/assets/Travel\\_Expenses5597.pdf](http://www.tru.ca/__shared/assets/Travel_Expenses5597.pdf).

Please convert all foreign currency to Canadian dollars and attach your original receipts to the piece of paper.

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 meal and mileage 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 or incidental receipts.

2. travel and associated expenses related to meetings, conferences, or other similar professional activities as outlined in:

[http://www.tru.ca/\\_\\_shared/assets/Travel\\_Expenses5597.pdf](http://www.tru.ca/__shared/assets/Travel_Expenses5597.pdf)

3. fees and other expenses for meetings of learned societies, other professional organizations, workshops, seminars, and similar activities;

4. fees and subscriptions for journals and books;

5. membership fees in learned societies and professional organizations;

6. travel and other expenses related to research activities and undertakings including costs and billings related to final editing of research materials.

#### UNCLAIMABLES

- You may not claim over \$250 a night for accommodation without prior approval.

- You may not claim over \$80 a day for car rental without prior approval.

- You may not claim personal long distance phone calls.

- You may not claim incidentals like entertainment, liquor bills (including use of mini bars), and side trips.

- You may not claim over \$40 per night if you stay at a private residence.
- You may not claim valet parking.
- 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.

- 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 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.

- You may not claim travel insurance.
- You may not claim for costs associated with self-published books, etc.
- 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 cannot 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.

#### POINTS TO NOTE

- When applying, be sure to include a clear and significant rationale as to how your PD and research activity benefits you and TRU.
- You may apply for up to \$2,500 worth of PD funding per activity dependent on how many students you have and which you have estimated over a twelve month period prior to applying for funds. You must have a minimum of five students to apply for funding and have completed your six (6) months probationary period after the registration of your first student.

However, you may not apply for funding in subsequent years for the same activity. For example, if you were awarded funding one year towards obtaining a post-graduate degree, you may not apply again for funding in subsequent

years.

- 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 or another education institution 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.
- The PD Committee uses the fiscal year (April 1-March 31), when determining application eligibility.
- PD funding is not retroactive. The PD Committee will not consider PD applications for past activities in which you have participated.
- PD funding is for TRUOLFA members only and cannot be applied to travelling companions.
- 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!
- 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.
- Make a copy of all your original receipts in case your receipts are lost. The PD Committee is not responsible for lost receipts.
- 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 Professional Development Fund and send it to John Patterson at the address below. Do not make it out to the PD committee or any one representative.
- If the successful applicant does not submit all receipts and PD report within the required 45 days, the OLFM must return any advance payment to the TRUOLFA PD Fund.

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 and research activity, mail your original receipts and PD report to John Patterson at:

Suite 309-1082 West 8th Avenue, Vancouver, BC V6H 1C4

Sincerely,

Your PD Committee:

John Patterson, TRUOLFA Representative

Derek Knox, TRUOLFA PD Fund Treasurer

Sarah Langlois, TRU Represen