

# The Update

---



Issue 5 2013/2014

June 2014

## IN THIS ISSUE

Council and CARC Membership .....	2
President's Report .....	3
First Vice-President's Report .....	5
Second Vice-President's Report .....	7
Treasurer's Report .....	8
Secretary's Report .....	9
Human Rights and International Solidarity	
Representative's Report.....	11
Excess Service Recognition Fund.....	14

## MEETING DATES

OCFA Executive meetings are generally held once every two weeks. If you would like to bring forward a particular item for consideration please contact one of your OCFA Exec members (see page 2 for the list).

OCFA Council meetings are generally held once per month. If you would like to bring forward a particular item for consideration please contact one of your OCFA Council or Exec members (see page 2 for the list).

## LETTERS TO THE EDITOR

The *Update* welcomes letters to the editor. I encourage you to write either in response to what you read in the newsletter or about other Faculty Association matters. Letters to the *Update* do not represent the opinions of the editor nor the OCFA Executive or Council. Please send letters as e-mail to the *Update* editor Erin Radomske at [eradomske@okanagan.bc.ca](mailto:eradomske@okanagan.bc.ca). The preferred format is MS-Word.

## DELIVERY OF THE UPDATE

The *Update* is now distributed electronically as a PDF file by e-mail as well as being available on the OCFA webpage at: <http://www.okanagan.bc.ca/administration/ocfa/update.html>

Copies of the *Update* are also posted in local campus mailrooms.

# Members of OCFA Council and CARC

## 2014-2015

---

### Executive:

		Phone	Email
President	Tim Walters	250-718-6387	<a href="mailto:TWalters@okanagan.bc.ca">TWalters@okanagan.bc.ca</a>
First VP, Chief Steward	Rod Watkins	250-718-4161	<a href="mailto:RPWatkins@okanagan.bc.ca">RPWatkins@okanagan.bc.ca</a>
Second VP, Bargaining Chair	Melissa Munn	250-718-0239	<a href="mailto:MMunn@okanagan.bc.ca">MMunn@okanagan.bc.ca</a>
Treasurer	Adrian Fontenla	250-718-6380	<a href="mailto:AFontenla@okanagan.bc.ca">AFontenla@okanagan.bc.ca</a>
Secretary	Erin Radomske	250-718-6385	<a href="mailto:ERadomske@okanagan.bc.ca">ERadomske@okanagan.bc.ca</a>

### Council:

Faculty Liaison – Arts	Matt Kavanagh	Ext 4819	<a href="mailto:MKavagh@okanagan.bc.ca">MKavagh@okanagan.bc.ca</a>
Faculty Liaison – Business	Shelley Johnson	Ext 4446	<a href="mailto:SJohnson@okanagan.bc.ca">SJohnson@okanagan.bc.ca</a>
Faculty Liaison – Health	Lindsay Kennedy	Ext 4253	<a href="mailto:LKennedy@okanagan.bc.ca">LKennedy@okanagan.bc.ca</a>
Faculty Liaison – Non-Instructional	Mike Minions	Ext 4755	<a href="mailto:MMinions@okanagan.bc.ca">MMinions@okanagan.bc.ca</a>
Faculty Liaison – Science	Bruce Campbell	Ext 4784	<a href="mailto:BCampbell@okanagan.bc.ca">BCampbell@okanagan.bc.ca</a>
Faculty Liaison – Technology	Randy Brown	Ext 4373	<a href="mailto:RBrown@okanagan.bc.ca">RBrown@okanagan.bc.ca</a>
Area Representative – Kelowna	Bob Groves	Ext 4331	<a href="mailto:BGroves@okanagan.bc.ca">BGroves@okanagan.bc.ca</a>
Area Representative – Penticton	Alan Illicic	Ext 3222	<a href="mailto:Allicic@okanagan.bc.ca">Allicic@okanagan.bc.ca</a>
Area Representative – Salmon Arm	VACANT	Ext	
Area Representative – Vernon	Richard Christie	Ext 4484	<a href="mailto:RChristie@okanagan.bc.ca">RChristie@okanagan.bc.ca</a>
Non-Continuing Faculty Rep	Steve Weber	Ext 8251	<a href="mailto:SWeber@okanagan.bc.ca">SWeber@okanagan.bc.ca</a>
Pension Advisory Representative	Doug Birtwistle	Ext 4337	<a href="mailto:DBirtwistle@okanagan.bc.ca">DBirtwistle@okanagan.bc.ca</a>
Human Rights and International Solidarity Representative	Norah Bowman	Ext 4215	<a href="mailto:NBowman-Broz@okanagan.bc.ca">NBowman-Broz@okanagan.bc.ca</a>
Status of Women Representative	Ann Marie McKinnon	Ext 4327	<a href="mailto:AMKinnon@okanagan.bc.ca">AMKinnon@okanagan.bc.ca</a>
Workplace Health, Safety and Environment Representative	Sasha Johnston	Ext 4819	<a href="mailto:SLJohnston@okanagan.bc.ca">SLJohnston@okanagan.bc.ca</a>

### Collective Agreement Review Committee:

Kelowna Campus Steward	Sasha Johnston	Ext 4819	<a href="mailto:SLJohnston@okanagan.bc.ca">SLJohnston@okanagan.bc.ca</a>
Penticton Campus Steward	Sharon Mansiere	Ext 3234	<a href="mailto:SMansiere@okanagan.bc.ca">SMansiere@okanagan.bc.ca</a>
Salmon Arm Campus Steward	Terry Kosowick	Ext 8234	<a href="mailto:TKosowick@okanagan.bc.ca">TKosowick@okanagan.bc.ca</a>
Vernon Campus Steward	Jeremy Lanaway	Ext 2214	<a href="mailto:JLanaway@okanagan.bc.ca">JLanaway@okanagan.bc.ca</a>

# President's Report

---

**Tim Walters**

## AGM News

For those of you who missed the AGM, a recap. There was fantastic food and drink and company, as ever. We decided together what to do with our service recognition fund surplus (see Michelle's article for full details). We elected a brand new Executive, Council, and CARC, with several new faces occupying important roles in our organization. You can find out who is now charged with representing your various interests as an OCFA member by going to our homepage: [http://www.okanagan.bc.ca/Campus\\_and\\_Community/employees/ocfa.html](http://www.okanagan.bc.ca/Campus_and_Community/employees/ocfa.html)

All OCFA positions are one year terms, running from July 1<sup>st</sup> to June 31<sup>st</sup>, so the folks whose names appear on the web page above will be your representatives until this time next summer – if you don't know them, I'd recommend you take some time to seek them out and introduce yourself. You'll have opportunities to do this at the campus socials (held in September and October) as well as at our Fall general meeting – we'll be sending you the dates of all these happenings in late August/ early September.

I'd like to extend a huge amount of gratitude to everyone who served last year, some of whom won't be returning for 2014-2015. We'll be without the energy, creativity and dedication of Jeremy Beaulne (Penticton Representative), Hannah Calder (Salmon Arm Representative), Chris Clarkson (Bargaining Chair, 2<sup>nd</sup> VP), Howard Hisdal (Vernon Steward), Drew McGillivray (Business Representative), John Mott (Penticton Steward), Alan Rice (Non-Continuing Faculty Representative) and Geraldine Street (Health Representative). We'll also have to make do, for the first time in an awfully long time, without the brilliant money-management and great company of our friend and long-time Secretary- Treasurer Michelle Nicholson, who is leaving us to take over as Chair of Education Council. Many thanks to all these good people (and to those who are still serving) for their sacrifice, commitment and activism, without which the OCFA couldn't do much of anything.

## FPSE AGM

I traveled to Whistler with several local OCFA representatives to attend the FPSE AGM. You'll be able to read the minutes from this meeting online shortly (at [www.fpse.ca](http://www.fpse.ca)) if that's your cup of tea, but I wanted to share some preliminary details about one of the more broadly significant things that happened. Perhaps most significantly, as a result of our ongoing struggles to gain fair treatment from the government at the bargaining table, the membership decided to draw a very large sum of money from the robust (more than \$9 million) defence fund for a public campaign about the value of the work we do. Along with several other FPSE Presidents, I have been appointed to a subcommittee to direct this campaign, which will be a many pronged attempt to make a case (using social media, TV and radio spots, print advertising) for the positive impacts of post-secondary educators on BC society, culture, and economy. If you have any suggestions on this front, please get in touch and let me know.

## **BCTF**

As you are all no doubt well aware, the BCTF have been forced into the last resort measure of a strike. The OCFA's position on this situation is one of unconditional solidarity. As well as being fellow educators who have also experienced the dismal reality of attempting to bargain fairly with the current provincial government, we are also formally affiliated with the BCTF through our shared membership in the BC Federation of Labour, and the Canadian Labour Congress. Our local area representatives have been helping to organize OCFA signage for those who want to walk with the teachers, and I would encourage you all to think about taking some time to do that. We have also written letters of support and solidarity to BCTF locals, and regional newspapers up and down the valley, and FPSE have issued several similar messages. At our most recent Executive meeting, we voted to make the maximum possible donation (\$3000) to the BCTF's strike fund, and will look to supplement this later in the summer if the job action is continuing. When bargaining commences in the Fall, we may find ourselves in exactly the same predicament that the teachers currently face, so it is doubly important that we stand side by side with them in this most difficult moment.

## **2014-2015 Planning**

At our first post-summer meeting of Council in late August, we determine our work plans for the year ahead. Our organization functions from bottom to top, and we take primary direction from our members, so if you have any ideas about any initiatives or projects you think we should take on in the year ahead, don't hesitate to get in touch with me ([TWalters@okanagan.bc.ca](mailto:TWalters@okanagan.bc.ca)/ 250-718-6387) or with one of your Council representatives – we're always on the lookout for good ideas, so drop us a line if you have one and we'll see what we can do.

I hope you all enjoy a relaxing and well deserved summer holiday, and I look forward to seeing you all in the Fall when things start ramping up once again.

Cheers,

Tim

# First Vice-President's Report

---

## Rod Watkins Chief Steward

Hello OCFA members

At the last AGM, I was re-elected as your Chief Steward and the following members have been elected as your campus Stewards. Starting in the North, Terry Kosowick has been re-elected as your Salmon Arm Steward. Jeremy Lanaway has been elected as your Vernon Steward. Sasha Johnston was re-elected as the Kelowna Steward. And Sharon Mansiere will be returning as your Penticton Steward. Please join me in thanking our new and returning Stewards for their service.

We currently have the following grievances underway:

### STEP 3 Grievances

#### **FAC13/04 - Violation of Academic Freedom and Improper Evaluation**

In spring of 2013, the OCFA learned that several administrators and support staff have complete access to, and have actually accessed without informing or requesting consent, instructor's Moodle sites as part of their summative evaluations. Such unannounced access, we have argued, is a violation of privacy, both of the instructor but also of students, as well as a violation of academic freedom. At the start of the summer 2013, we agreed to place the grievance in abeyance pending discussions of a new policy. Over the summer, the College prepared and published in June a policy regarding IT services allowing the College complete and unfettered access to all IT services, including Moodle. As a result, we removed the grievance from abeyance and are currently in talks. (See FAC13/11 below as well.) While preparing for the arbitration, the College has indicated they will be preparing a new policy that resolves our issues.

#### **FAC13/07 - Failure to Provide Benefits to Members over Age 65**

Currently, members who continue to work past age 65 lose their LTD as well as Life Insurance coverage at OC. At the encouragement of FPSE and in coordination with other College's and FPSE's Human Right Tribunal case, we have filed a policy grievance against this form of age discrimination. It has been denied by the College. FPSE, in coordination with the OCFA, are preparing for arbitration of this grievance in January 2015.

#### **FAC13/11 - Violation of Copyright Ownership**

As part of the new IT policy mentioned above (FAC13/04), the College had claimed ownership of every item posted or transmitted via the College's IT services. This includes anything posted by a faculty member or student via the school's Moodle, email or any other IT service. This is a clear violation of our Copyright language that guarantees that copyright ownership ordinarily resides with the instructor. After talks with the College, the copyright issue has been resolved. But in the process, several other problematic elements of the IT policy were discovered. While preparations for arbitration proceed, as with FAC13/04, the College is amending the policy to resolve the grievance.

### **FAC13/08 – Improper Use of Administrative Leave**

### **FAC13/09 – Improper Use of Administrative Leave**

Two members were placed on administrative leave last year. At the advice of FPSE and at the request of the College, we have filed separate grievances for both additional members placed on admin leave. Plans for arbitrating the grievances are underway.

### **FAC13/12: Wrongful Suspension**

A member received a lengthy suspension without pay. We have filed a grievance of the discipline on the grounds that it does not represent progressive discipline as defined in Article 35. This grievance as well is proceeding to arbitration.

### **FAC13/13: Wrongful Censure**

A member received a letter of censure. We have filed a grievance of the discipline on the grounds that the censure was not warranted by College Policy. This as well is heading toward arbitration.

## **STEP 2 Grievances**

### **FAC14/01: Improper Letter of Expectation**

### **FAC14/02: Improper Letter of Expectation**

Two members received so-called Letters of Expectation from the College. We grieved on the grounds that such letters are not expunged from a members personnel file after two years without discipline as with letters of censure. There are some additional confidential grounds for the grievance as well. We are awaiting a reply from the College.

### **FAC14/03 Improper Resolution of PD Error**

A member in Arts was told twice (in person and in writing) what her remaining 2012-2014 PD balance was. She applied for and received approval to use nearly all of that amount. She then spent the money. Only thereafter was she informed that her balance was actually substantially lower. The Arts office elected to make up the shortfall by withdrawing it from her 2014-2016 PD funds. We have requested the College rescind this decision and pay for their own error. We are awaiting a reply from Andrew Hay.

## **Other Matters**

There are a number of additional matters that your CARC committee and I have been attending to in the past few weeks.

First, we have had reports from some of our members of ongoing safety concerns in the STH portfolio. Some of these have been resolved; others are still under review by Dean Moritz and the College's Safety Officer. We expect to have a report from the College at the end of this month regarding their plans for additional improvements.

At the request of Council, I authored a letter to Jim Hamilton expressing the OCFA's grave concerns about the failure of the Infosilem scheduling software to properly respect the contractual requirements of the Collective Agreement. As requested at the AGM, if anyone has been assigned a workload they know or believe is in violation of the Agreement, please let me know as soon as possible. I have received no reply to the letter.

As directed by the membership at the AGM, I wrote a letter to Jim Hamilton outlining our members' serious concerns about the College's policies and procedures regarding bullying and harassment in the workplace. I have received no reply to this letter either.

A series of accommodations for a variety of medical conditions have been submitted to HR. We have been carefully monitoring these to assure our members are provided adequate and fair accommodations. If anyone is in the process of filing for an accommodation, please let me or your campus Steward know if you have any questions or concerns.

Rod Watkins  
First VP/Chief Steward  
OCFA

## Second Vice-President's Report

---

### **Chris Clarkson** **Negotiations Committee Chair**

In the last issue of the *Update*, I reported that the OCFA and the employer would be bargaining this Spring. As it turns out, that statement was overly optimistic.

We met with the employer on April 28, and during our discussion of protocol, recognized that uncertainty over the mechanism to address common agreement issues had to be resolved before we could progress any further. Both sides agreed to stand down, so that the matter, which involves the entire sector, could be addressed by the Federation of Post-Secondary Educators (FPSE) and Post-Secondary Employers' Association (PSEA). While the final details respecting the table to address common agreement issues has not been determined at this time, both the OCFA and Okanagan College have expressed interest in participating. Our negotiations are unlikely to resume before these common table details have been worked out.

Provincially, the Health Sciences Association, BCGEU, Hospital Employees Union, and CUPE workers in the K-12 system have all signed five-year contracts involving 5.5% salary increases, the Economic Stability Dividend, and modest improvements to benefits and expense allowances. The BCGEU agreements also involved additional compensation increases for some employees in low-wage classifications. Collectively, these agreements cover two-thirds of provincial public sector employees. At this point, the BCTF is contesting the pattern, and as most of you know, is heading into the second week of a full strike. How that dispute is resolved may have implications for our negotiations.

Finally, I will be taking an extended study leave for the 2014-2015 academic year, and at the OCFA Annual General Meeting, Melissa Munn (Sociology and Women's Studies, Vernon and Salmon Arm campuses) was acclaimed as my replacement. Melissa has previous experience as

a bargaining chair at Northwest Community College, and the OCFA will be very well-represented at the bargaining table. I'd also like to take this opportunity to thank all of the members who helped the bargaining committee prepare for this round, by completing the survey, bringing issues to my attention, and/or patiently explaining to me the intricacies of the problems involved. The association is better prepared for bargaining because of your contributions.

## Treasurer's Report

---

Michelle Nicholson, MBA, CGA, CPA

### \$\$Way More Money\$\$

*By Michelle Nicholson, Secretary Treasurer*

Some of you may have heard of the Service Recognition on Retirement Allowance that was negotiated in the 2010-2012 Collective Agreement. This benefit was paid for by savings from changes to the Collective Agreement as detailed in MOA #1. This MOA stipulates that any excess funds which are not utilized for Service Recognition on Retirement Allowance cannot be carried forward and will be available for other employment-related initiatives for employees covered by the Collective Agreement. For the 2013/2014 fiscal year there are excess funds in the amount of \$132,869.23. It has been agreed between the OCFA and OC to

distribute these funds to the OCFA members using the Professional Allowance Fund as follows:

#### Eligible Employees:

**All members of the Faculty Association with either a term or continuing appointment during Fall 2014 semester are eligible. Claims will NOT be prorated. All faculty members with a contract for Fall 2014 may claim up to the maximum.**

#### Eligible Expenses:

- Professional dues
  - Subscriptions to scholarly journals
  - Books
  - Computer software
  - Computer equipment
  - Other equipment
- Furniture and internet fees are not eligible expenses.

#### Maximum Claim:



The entire Excess Service Recognition Fund must be paid out to Faculty members before March 31, 2015. The maximum claim per faculty member will be set to fully pay out the excess funds with the claims submitted. The **maximum is expected to be between \$500 and \$950**. For Faculty on continuing appointments: any receipts that are not used will be returned for the May 2015 PA claim. Unfortunately individual receipts can only be used once. So any unpaid balance of a large receipt cannot be claim from PA in May 2015.

The maximum is  
expected to be  
between \$500 and  
\$950.

**Deadline:**

Send the EXCESS SERVICE RECOGNITION FUND DISTRIBUTION FALL 2014 PA FORM with original receipts attached **AS PER INSTRUCTIONS ON PAGE 2** to Michelle Nicholson, Chair PA Committee E224 Kelowna campus by **January 16, 2015**. Only one application per employee is allowed. **Receipts must be dated between May 16, 2014 and December 31, 2014**. Applications will be reviewed by the PA committee by January 23, 2015. Available funds will be fully distributed by the committee so late claims cannot be accepted.

The PA fund does not require pre-approval before funds are spend. Read the criteria for eligible expenses above, make your purchase(s), save the receipts and submit your claim. A short note explaining how your expenses help you maintain currency in your field is helpful in some cases. If you have any questions just email Michelle Nicholson.

## Secretary's Report

---

### Erin Radomske

#### EXECUTIVE AND COUNCIL ELECTIONS

At our AGM on May 8, 2014, you elected OCFA Council, Executive, and CARC members for 2014-2015 (see below as well as page 2). Thank-you to all nominees for their willingness to contribute to the OCFA as an active member on Council, Executive, and CARC.

**2014-2015 OCFA Executive, Council, and CARC**

President – **Tim Walters**

First VP, Chief Steward – **Rod Watkins**

Second VP, Bargaining Chair – **Melissa Munn**

Treasurer – **Adrian Fontenla**

Secretary – **Erin Radomske**

Faculty Liaison – Arts – **Matt Kavanagh**

Faculty Liaison – Business – **Shelley Johnson**

Faculty Liaison – Health – **Lindsay Kennedy**

Faculty Liaison – Non-Instructional – **Mike Minions**

Faculty Liaison – Science – **Bruce Campbell**

Faculty Liaison – Technology – **Randy Brown**

Area Representative - Kelowna – **Robert Groves**

Area Representative – Penticton – **Alan Ilicic**

Area Representative – Salmon Arm - **Vacant**

Area Representative – Vernon – **Richard Christie**

Non-Continuing Faculty Rep – **Steve Webber**

Pension Advisory Representative – **Doug Birtwistle**

Human Rights and International Solidarity Representative – **Norah Bowman**

Status of Women Representative – **Ann Marie McKinnon**

Workplace, Health, Safety, and Environment Representative – **Sasha Johnston**

Kelowna Campus Steward – **Sasha Johnston**

Penticton Campus Steward – **Sharon Mansiere**

Salmon Arm Campus Steward – **Terry Kosowick**

Vernon Campus Steward – **Jeremy Lanaway**

# Human Rights and International Solidarity Representative's Report

---

**Norah Bowman**

## **Canadian Labour Congress Convention, May 2014, Montreal**

Tim Walters, OCFA president, and Norah Bowman, Human Rights and International Solidarity representative on council, attended the Canadian Labour Congress Convention.

Some of the central themes that emerged at the CLC convention were the importance of participation in municipal and regional politics, the value of reaching out across social movements in Canada and contributing to diverse activist campaigns, the necessity of teaching Canadians about the gains and goals of the labour movement in Canada, and the urgency of working towards the election of a new federal government majority party and prime minister in the next election.

The CLC passed the following resolutions that relate to our sector:

### **21. Science, Scientists and Research**

The CLC WILL call on the Federal Government to:

- a) restore science research funding levels to those appropriate to a nation of Canada's means and status;
- b) return the granting system to one where basic research is funded appropriately;
- c) restore support for Canada's internationally recognized research institutions, programs, libraries, archives and personnel; and
- d) remove political constraints from all government scientists in order to develop policy based on science

### **23. Labour Education in Post-Secondary Schools**

The CLC WILL:

- a) Encourage labour councils and affiliates to lobby the provincial and territorial governments to include labour studies curriculum in high schools
- b) Work with labour councils and affiliates to ensure the curriculum includes rights at work, health and safety, employment standards and labour history; and
- c) Facilitate the circulation of material that exists on labour education in high schools, colleges and universities and make it available to affiliates and labour councils

- d) Remove political constraints from all government scientists in order to develop policy based on science;

#### **THE CLC WILL:**

- a) Endorse the Canadian Association of University Teachers (CAUT) “Get Science Right” campaign; and
- b) work with progressive media sources to highlight the federal government’s muzzling of scientists, experts, and the elimination of data collection

### **Idle No More Teach In**

Report by Gail Smith and Norah Bowman

On June 4<sup>th</sup>, at Okanagan College, OCFA took part in and sponsored the lunch for an Idle No More Teach-In. Over 100 people attended, included students from OC and UBCO, OC staff and faculty, and Kelowna community members.

OC business student Tina Miller (Nisga’a Nation) spoke about why the Idle No More movement is important to her and also about her concerns about the proposed changes to the First Nation Education Act. Jalisa Kruger (Penticton Indian Band), an OC Trades Student sang the Okanagan Song and was accompanied by Sheena George (Penticton Indian Band) an OC Arts student, who drummed while Jalisa sang.

OC faculty Norah Bowman and Bill Cohen (Okanagan Indian Band) spoke about language and cultural revitalization and about the First Nations Education Act, Bill C-33.

Guest and Elder Dennis Saddleman (Nlaka’pamux and Okanagan Nation) gave a riveting performance and poetry reading. Dennis spoke from the heart and opened many eyes with his honesty and personal struggles overcoming the appalling accounts of abuse faced at the Kamloops Indian Residential School. Dennis was able to find strength in his journey in life and it was a very inspirational talk.

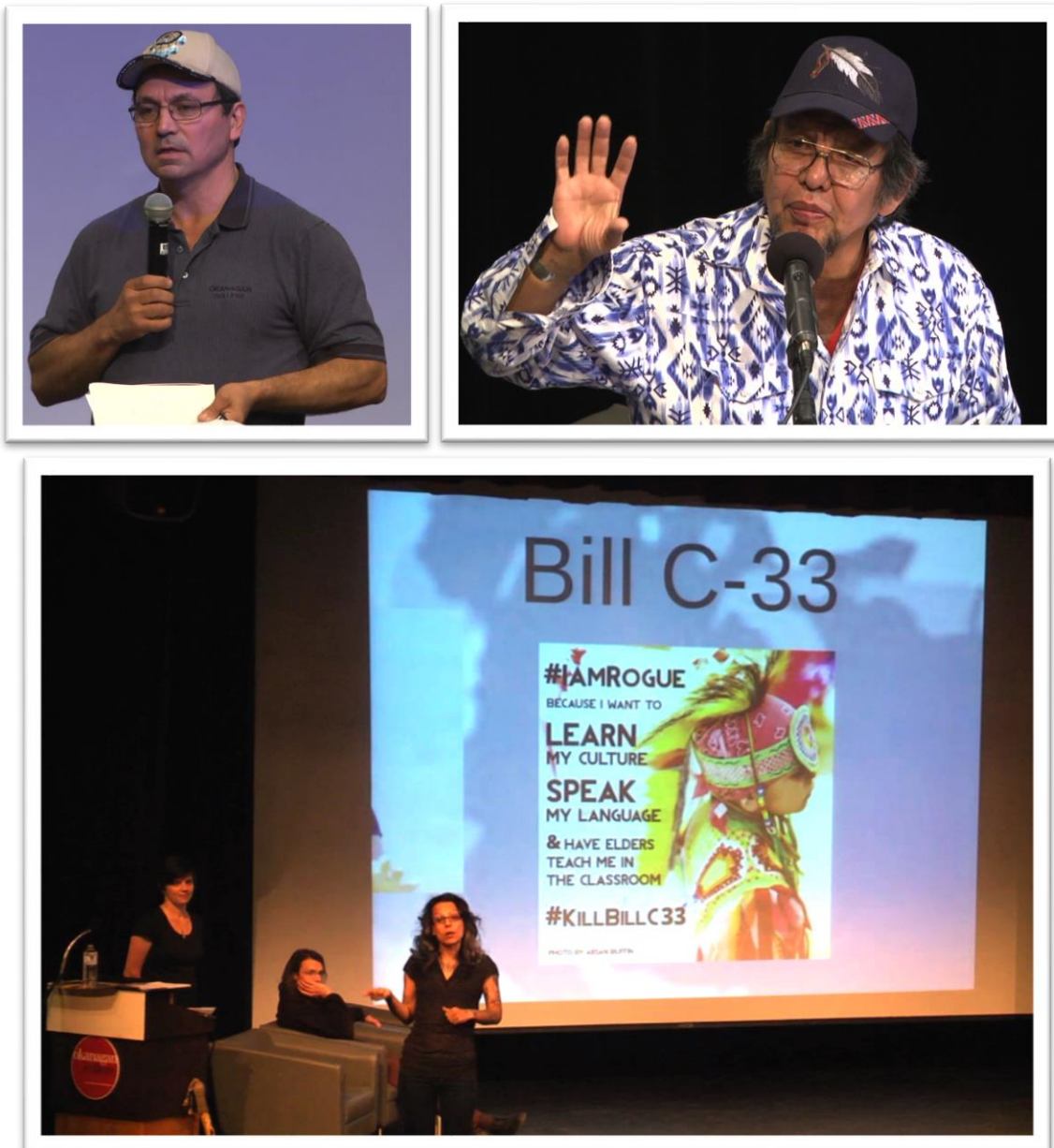
Dennis also brought truth and awareness to intergenerational trauma that affects families of residential school survivors, and others who have lost their culture, deal with on a daily basis.

The event was streamed live to the other campuses. Michael Minions, Educational Technology Coordinator, recorded the event and will post a link to the recording soon. We should be able to view the recording online at [vimeo.com/basalt](https://vimeo.com/basalt)

### **Civil Engagement Workshop, Held May 30<sup>th</sup> at Okanagan College Kelowna Campus**

Facilitated by Earyn Wheatley and Texas Joe Constantine, this workshop focused on building allies in community members, developing goals, strategies and action plans for social justice campaigns, and

developing grassroots direct action movements. About 20 people attended, including faculty, staff, students from OC and UBCO, and community members. OCFA sponsored this workshop.



Idle No More Teach-In



**EXCESS SERVICE RECOGNITION FUND  
DISTRIBUTION FALL 2014  
Professional Allowance Application  
For Faculty Association Members**

<b>Last Name:</b> _____	<b>First Name:</b> _____
<b>Employee Number:</b> _____	<b>Application Date:</b> _____
<b>Telephone Number or local :</b> _____	<b>Department:</b> _____

**Eligible Employees:**

Members of the Faculty Association with either a term or continuing appointment during Fall 2014 semester.

**Eligible Expenses:**

Eligible employees may claim reimbursement, up to the maximum established by the Professional Allowance Committee, for employment related expenses that meet the following criteria:

- The expense must be for the purpose of satisfying the employee's contractual obligation to maintain competency and currency in his or her areas of specialization or employment.
- The expenses cannot be of the type for which reimbursement is otherwise available from Travel Allowances (Article 42), Professional Development (Article 23), Grants in Aid of Research, Scholarly and Creative Activity (Article 26), or Professional Registration and Membership Costs (Article 25)
- Allowable expenses include but are not limited to:
  - Professional dues
  - Subscriptions to scholarly journals
  - Books
  - Computer software
  - Computer equipment
  - Other equipment
- Furniture and internet fees are not eligible expenses.

**Maximum Claim:**

The entire Excess Service Recognition Fund must be paid out to Faculty members before March 31, 2015. The maximum claim per faculty member will be set to fully pay out the excess funds with the claims submitted. The maximum is expected to be between \$500 and \$950. For Faculty on continuing appointments: any receipts that are not used will be returned for the May 2015 PA claim. Unfortunately individual receipts can only be used once. So any unpaid balance of a large receipt cannot be claim from PA in May 2015.

**Deadline:**

Send this form with original receipts attached AS PER INSTRUCTIONS ON PAGE 2 to Michelle Nicholson, Chair PA Committee E224 Kelowna campus by January 16, 2015. Only one application per employee is allowed. Receipts must be dated between May 16, 2014 and December 31, 2014. Applications will be reviewed by the PA committee by January 23, 2015. Available funds will be fully distributed by the committee so late claims cannot be accepted.

**Statement of Eligibility:**

**I certify that these expenses are for the purpose of offsetting professional activities in accordance with the**

<b>above guidelines.</b> _____	<b>Total Amount Claimed: \$</b> _____
(Signature of claimant)	<b>Please check one: Term</b> ____ <b>Continuing</b> ____

Approve	Reject	Signature	Office Use Only
<input type="checkbox"/>	<input type="checkbox"/>	Michelle Nicholson	_____
<input type="checkbox"/>	<input type="checkbox"/>	Richard Christie	_____
<input type="checkbox"/>	<input type="checkbox"/>	Heather Schneider	_____
<b>Memberships:</b>	<b>Account Code:</b> 21016-744691-7140-51101		\$ _____
<b>Subscriptions:</b>	<b>Account Code:</b> 21016-744691-7811-51101		\$ _____
<b>Software:</b>	<b>Account Code:</b> 21016-744691-7801-51101		\$ _____
<b>Goods:</b>	<b>Account Code:</b> 21016-744691-7802-51101		\$ _____
<b>Total Approved</b>			\$ _____

**DIRECTIONS FOR RECEIPTS:**

- Receipts must be dated between **Receipts must be dated between May 16, 2014 and December 31, 2014**
- You must use **original** receipts or invoices that are marked **“paid”**. You may not use invoices or internet printouts that do not clearly indicate they have been paid. Credit card statements may only be used as proof of payment.
- If you must retain the original receipt for warranty purposes. Write “PA CLAIM - original retained for warranty” on the original receipt, then copy the receipt and include the copy with your claim.
- If only some items on a receipt are claimed, write your calculations on the bottom of the receipt to clearly indicate the total amount claimed.
- Each receipt must clearly show what was purchased. Include a note to explain each receipt that does not have clear details. For unusual items include an explanation of why this item is appropriate.
- **Receipts must be glued or taped to sheets of 8½ x 11 inch paper to facilitate scanning.**
- Each receipt must be listed in order on the summary below. The total of the summary must match the amount claimed on Page 1.
- Use only **one** staple to attach receipts to this form. Do not use paperclips.

Claims submitted following the above directions will be processed and paid more quickly.

### Summary:

[illegible]