

Complete Policy Title:
**Professional Development Allowance,
Clinical Faculty, Faculty of Health
Sciences - Policy**

Policy Number (if applicable):

Approved by:
Board of Governors

Date of Most Recent Approval:
June 9, 2011

Date of Original Approval(s):

Supersedes/Amends Policy dated:

Responsible Executive:
**Dean and Vice-President (Health
Sciences)**

Enquiries:
[University Secretariat](#)

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The Faculty of Health Sciences is committed to promoting the professional development activities of its Clinical Faculty members. In support of these activities, an annual professional development allowance is made available as an option to each eligible Clinical Faculty member. Participation in the program is voluntary and faculty members (either individually or collectively through their departmental practice plan) can decline to participate. This plan and its implementation will conform to Revenue Canada's regulations pertaining to taxable benefits to individuals.

1. Eligibility:

- a. Full-time Clinical Faculty who hold a full-time faculty appointment, have a signed Annual Personnel Agreement with the University and are a member of Regional Medical Associates and receive a PDA allocation as a cost of practice funded from the physician's clinical earnings.
- b. New full-time Clinical Faculty appointed on July 1 will receive the full PDA for the fiscal year as per their annual personnel agreement. This amount may be pro-rated for Clinical Faculty appointed after July 1.
- c. Professional development expenditures funded by external agencies will comply with the regulations of the funder and will be administered outside of this policy. If the external agency has no regulations or provides limited direction, then the expenditures will be administered in a manner consistent with this policy.

2. Annual PDA Amount:

- a. The annual PDA amount for full-time Clinical Faculty is specified by the departmental clinical practice plan and may range up to \$5,000 per year among individuals. The amount is determined annually by the Department Chair and codified in the Annual Personnel Agreement for each Clinical Faculty member.
3. The funds are designated strictly for use by the individual Clinical Faculty member.
 4. Expenses covered by this allowance must be related to the Clinical Faculty member's professional development and may include:
 - a. annual or lifetime professional dues and membership fees for learned societies. Professional memberships related to the clinical practice of the Clinical Faculty member are specifically excluded from eligibility. Such expenses as CPSO licensure, CMPA malpractice insurance, OMA dues, paging, parking and other business expenses are covered under the allowed business expense (ABE) package of Regional Medical Associates for full-time Clinical Faculty members and are a personal business expense for part-time Clinical Faculty members;
 - b. manuscripts, subscriptions to professional and/or learned journals and other similar professional publications;
 - c. computer software and supplies used or consumed in the performance of the Clinical Faculty member's duties in teaching and/or research;
 - d. travel including transportation, food and accommodation for the member to attend scholarly conferences, field trips, research visits, or workshops; in accordance with the Travel Policy and Procedures (AP-010);
 - e. hosting meals which include networking as a formal courtesy with guest researchers or other visitors to the University, or cover University related activities that contribute to the achievement of academic objectives. The attendees may include graduate students or lab staff. In order to be eligible under the PDA policy, these expenditures must contribute to the professional development of the Clinical Faculty member either through the provision of a forum to exchange new ideas or further discuss ongoing research activities with students or staff or to provide networking opportunities with off campus partners or stakeholders. In all cases, the reimbursement of this type of expenditure must be accompanied by a description of the specific professional development purpose of the expenditure and a list of attendees;
 - f. expenses incurred in the preparation and completion of scholarly manuscripts, and page or reprint charges;

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- g. equipment, including computers used in the performance of the Clinical Faculty member's duties in teaching and/or research.

All goods purchased under this plan are the property of McMaster University but are available for the use of the individual Clinical Faculty member for professional development activities while the Clinical Faculty member is associated with the University. Disposal of such goods at the end of their service life is at the discretion of the department chair.

Ineligible expenses include interest charged on overdue charge accounts and other personal expenses that, under current tax legislation, would be considered a taxable benefit to the individual. These personal expenses include but are not restricted to gifts, personal meals, social club (e.g. University Club) membership fees and personal living expenses.

5. It is the individual Clinical Faculty member's responsibility to ensure that the expenses charged against his/her PDA account are legitimate costs incurred for his/her professional development and are supported by the required documentation.
6. In the event that the Clinical Faculty member is unable to account for the charges to the department chair's satisfaction, the chair, after consultation with the Dean/VP Health Sciences, will refuse payment, or request reimbursement if the claim has already been paid. If such action has previously been taken against the Clinical Faculty member in respect of an ineligible claim, and if the chair, after consultation with the Dean/VP Health Sciences, determines that sanctions are appropriate he/she will initiate proceedings under the Code of Conduct for Faculty.
7. The department chair, or the delegate on record, shall determine whether a claimed expense qualifies as an eligible expense as described in section 4 (above). Where there is a disagreement with respect to the eligibility of an expense, the matter shall be referred to the Dean/VP Health Sciences. The decision of the dean shall be final and binding on all parties and there shall be no further appeal.
8. PDA accounts will be adjusted to budget at April 30. If a Clinical Faculty member does not spend all of his/her PDA in a given fiscal year (May 1 to April 30), the unspent balance will be made available to that Clinical Faculty member in the following year. Deficits are not permitted and any deficit which may occur will be a first charge against future PDAs. Any unspent balance of a PDA for a Clinical Faculty member whose position becomes vacant during the year will also revert to the department chair and may be allocated, saved or spent at the discretion of the department chair. The department chair may use the funds for teaching and/or research in the Faculty of Health Sciences.
9. Over-expenditure is not permitted. Any over-expenditure incurred by a Clinical Faculty member who subsequently leaves the University must be recovered directly

from the individual Clinical Faculty member or be charged to an account identified by the department.

- 10.** A Clinical Faculty member who retires or leaves the university during the academic year will be entitled to at least a pro-rated amount of Professional Development Allowance using the appointment year of July 1 to June 30. In no cases will the unspent balance in the PDA account of a Clinical Faculty member who retires or leaves the university be paid out to the Clinical Faculty member or their estate. For Clinical Faculty who retire from the University but continue to hold a post-retirement appointment or Professor Emeritus status and remain active in teaching and research at McMaster, the University Department Chair may authorize an additional 12-month grace period(s) to spend against any unspent PDA balance existing at the time of retirement, with the exception that acquisition of computer equipment is not a permitted expense during this grace period(s). For Clinical Faculty who resign from a full-time faculty appointment but continue to hold a part-time faculty appointment and remain active in teaching and research at McMaster, the University Department Chair may authorize an additional 12-month grace period(s) to spend against any unspent PDA balance existing at the time of retirement, with the exception that acquisition of computer equipment is not a permitted expense during this grace period(s). Any unspent balances due to termination, retirement, resignation or death will accrue as savings to the department and may be allocated, saved or spent at the discretion of the department chair. The department chair may use the funds for teaching and/or research in the Faculty of Health Sciences.