



Professional Development Guidelines for Instructional Professors, Lecturer 2s, and Writing Instructors

This document is being provided to guide the implementation of Article 22 of the Collective Bargaining Agreement (CBA) between the University and Service Employees International Union, Local No. 73. More specifically, these guidelines clarify criteria and procedures regarding eligible Lecturers' 1) access to professional development funds and 2) requests for professional development leave.

I. Professional Development Funds

Article 22.2 of the CBA specifies that the following ranks of Lecturers are eligible for certain minimum annual professional development allowances:

- Instructional Professor – \$2,500
- Associate Instructional Professor – \$2,500
- Assistant Instructional Professor – \$2,500
- Lecturer 2 – \$1,700
- Writing Instructor – \$1,700

Newly hired Lecturers in the above ranks, as well as Lecturers in these ranks whose use of professional development funding has been judged to be in alignment with the University's criteria (see below for further information), will have access to individual professional development accounts funded with at least the amounts listed above. Please note that unused funds do not roll over from one fiscal year to the next.

Criteria for Accessing Funds

As stated in Article 22.1, Lecturers whose assigned duties include professional development must focus their professional development activities on “(1) maintaining current subject-matter expertise in their respective instructional areas and (2) maintaining currency in best practices for student learning for purposes of delivering current knowledge in and out of the classroom.” Lecturers are to document their specific professional development activities each year in their annual report, and the expectation for satisfactory performance in professional development for a given year is that the total year's effort will include both activities focused on maintaining subject matter expertise in the instructional area *and* activities focused on best practices for student learning. (As Article 22.1 also states, the University makes numerous professional development activities available at no additional cost to the Lecturer, and these activities may be engaged in by Lecturers for fulfilling their professional development responsibilities.) Appendix A at the end of this document provides examples of generally allowable and unallowable purchases using professional development funds.



When submitting an expense report to request funds to support a professional development activity, Lecturers are to explain how the activity they are submitting for funding will enhance their subject matter expertise in the instructional area and/or their practices for supporting student learning (Article 22.3). Expense reports that do not adequately clarify how the activity relates directly to one or both of these forms of professional development may be denied for funding. Similarly, in the Lecturer's account of their professional development activities in their annual report, the Lecturer must detail their use of professional development funds during the year and specify how each funded activity has served one or both of the required forms of professional development. Annual reports will be reviewed by the Lecturer's supervisor as usual, and as part of all reappointment and progression processes the University (typically by means of the Lecturer's review committee) will evaluate the Lecturer's use of professional development funding during the term of appointment under review. If the University determines that the Lecturer's use of funds has not aligned with the criteria for professional development activity, then upon the start of the next term the Lecturer may be required to request prior approval for all professional development expenses, i.e., the Lecturer will have no expenses approved unless they have secured written approval from their unit for each expense in advance. The need for this prior approval requirement will be reviewed annually; the Lecturer's adherence to the requirement during that year, as well as the content of their annual report for that year, will be considered when determining whether to continue or halt the requirement for the following year.

It is important to note that expenses related to original research activity (e.g., conference travel for the purpose of presenting a manuscript that the Lecturer hopes to publish as a journal article) will not be considered as approvable expenses unless the Lecturer can demonstrate how such activity is necessary for producing concrete improvements in the Lecturer's syllabi, course materials, assessments, etc. Original research carried out by a Lecturer in satisfaction of their job duties must be in conformance with their contract; typically, such research will be into methods and techniques for effective teaching of their subject matter. It will not typically be original research in the field of their engagement: such research falls outside the typical duties assigned to a Lecturer. While the University expects each Lecturer to maintain subject matter expertise as their field changes as part of their professional development (and one-ninth of a full-time Lecturer's position is typically assigned to this), maintaining such expertise and knowledge does not require conducting original research. Therefore, attending a conference on genetics to learn about recent results in the field in order to incorporate these results into revised syllabi and course materials is an appropriate use of professional development funds. But attending a conference to present a paper with original research on genetics will not generally be considered appropriate and is not justifiable solely on the basis that the research will "inform" the Lecturer's teaching.

Furthermore, if an expense is approved on the basis that the research activity will enhance the Lecturer's teaching practice but the Lecturer does not then provide concrete evidence of such results in their teaching materials, syllabi, assessments, annual reports, etc., then during the



Lecturer's next reappointment or progression review the Lecturer may be required to abide by the prior approval requirement starting the year following the review (if the Lecturer is indeed reappointed or progressed). For Lecturers whose assigned duties include teaching courses specifically on research methodology or guiding student research projects (e.g., master's theses), research activity related to teaching that is submitted for funding may be approved provided that the Lecturer's expense reports and annual reports demonstrate how such activity will enhance or has enhanced the Lecturer's teaching of research methodology courses or their guidance of student research. The advancement of a Lecturer's own research agenda is not an appropriate justification for the use of professional development funding.

Procedures for Charging Expenses

It is recommended that Lecturers discuss specific plans for using professional development funds with their supervisor before moving forward with those plans. Lecturers who have been provided with a GEMS card under Article 20.1.M should use their GEMS card for charging professional development expenses. Lecturers who do not have a GEMS card should reach out to their unit's academic affairs office to inquire about charging their expenses to a GEMS card belonging to the unit. Any Lecturer who has been placed on the prior approval requirement must communicate with their unit regarding procedures for requesting approval for expenses before those expenses are charged.

II. Professional Development Leave

Article 22.4.A states that following every six years of service as Instructional Professors (IPs), IPs are eligible for paid professional development leave of one quarter out-of-residence with a course reduction of two courses from their total annual teaching assignment. This one-quarter leave may be extended to two quarters, with a teaching assignment of two courses in the one remaining quarter in residence, under either of the two following scenarios:

- The IP secures external funding greater than or equal to 33% of their annual base salary (excluding benefits)
- The IP accepts a 33% reduction in annual base salary

The professional development leave may be extended to a full year out-of-residence, with full release from teaching, under either of the two following scenarios:

- The IP secures external funding greater than or equal to 66% of their annual base salary (excluding benefits)
- The IP accepts a 66% reduction in annual base salary

*Please note that securing external funding does not guarantee that a professional development leave will be thereby extended.



The IP must apply for professional development leave using the procedures and deadlines applicable to Statute 11.1 faculty in the relevant unit. As with all faculty requests for leave, any request from an IP for leave is ultimately subject to review and approval by the Office of the Provost.

The purpose of a professional development leave is to expand expertise necessary to improve effectiveness in an IP's assigned duties. Generally speaking, such leave should be used by an IP to expand subject-area expertise in ways that improve understanding of how the subject-area should be taught, and/or to expand expertise in how students learn.

Any leave request should therefore demonstrate how the proposed activity during the leave will enhance the IP's subject matter expertise in their instructional area and/or their practices for supporting student learning. **Requests for leave must also demonstrate the need for absence from campus in order to engage in the proposed activity**, and requests that do not adequately demonstrate this need will not be approved. Professional development leave is not appropriate if the IP's proposed activity is creating new instructional material or designing new courses. IPs who wish to request time for such efforts may submit an application for a one-course reduction in their teaching assignment (see below). All leave requests will be evaluated based on the IP's proposed use for the leave time, as well as on evidence of productive use of previous professional development leaves if the IP has taken previous such leaves.

If a unit receives multiple leave requests from IPs that are each approvable on the merits and are for overlapping time periods, the unit may not be able to grant each request if granting each would be overly disruptive to the unit in fulfilling its curricular and service responsibilities. In such a scenario, the unit may determine which request(s) to grant for the requested time period based on consideration of factors such as: the precise timeframes for the different leaves being requested in relation to the unit's curricular and service responsibilities; any potential flexibility in the timeframes offered by the different leave requests; the relative merits of the different leave requests in comparison with each other; and the relative urgency of particular teaching and service responsibilities held by each IP who is requesting leave.

IPs should consult with their supervisor, department chair (if applicable), and Dean's office as far in advance of making a leave request as possible in order to minimize the likelihood that their potential leave would negatively impact their unit. If an IP's leave request is approved but must be delayed at the request of the Chair or Dean for teaching or service reasons, the unit will make every effort to avoid delaying the IP's future professional development leaves as a result.

Professional development leave will not be approved during the final year of any IP's term of appointment. IPs who are on professional development leave may not accept paid employment of any kind during their leave, nor may they hold academic appointments at other institutions during a leave.



Requests for One-Course Teaching Reduction

Article 22.4.B establishes that following three years of service as a Lecturer, a Lecturer may apply for a one-course teaching reduction for the purpose of either (1) creating high-quality instructional material that could not be created without the course reduction or (2) designing new courses that could not be created without the course reduction. Please note that eligibility for a course reduction for reason (2) is limited to Lecturers who have been assigned to design and teach at least two original courses during the academic year in which they would have the one-course reduction. If a Lecturer is granted a course reduction for either reasons (1) or (2), they will be eligible for a subsequent course reduction following four years of continuous service after the year in which the course reduction took place.

All requests for a one-course reduction must be submitted to the relevant Dean's office by January 15 of the academic year preceding the year in which the course reduction would take place. The requests must be approved by the Lecturer's supervisor and chair (if applicable) in order to be considered by the Dean's office.

A request for one-course reduction to create high-quality instructional material must include description of the materials that will be generated (e.g., a new textbook for language instruction) by the extra time afforded, and explanation for why such materials could not have been created without the course reduction. The evaluation process for such a request will particularly weigh whether the materials created would have meaningful pedagogical impact beyond the courses taught by the individual Lecturer taking the one-course reduction.

A request for one-course reduction to design new courses must include description of the courses that will be generated by the extra time afforded, and explanation for why such courses could not have been created without the course reduction. The evaluation process for such a request will weigh the potential impact of the newly designed courses on the unit's curriculum (e.g., whether the new courses would fill a unique need within the curriculum) and the degree of difficulty involved with developing the instructional materials, assignments, assessments, etc. for the proposed courses.



Appendix A

Examples of generally allowable purchases using professional development funds:

- Academic books and journals related to pedagogy and/or the Lecturer's instructional area
- Conference registration fees
 - As noted above, conference attendance is intended for enhancing subject matter expertise and/or practices for supporting student learning, rather than for pursuing an original research project
- Membership in professional organizations
 - Appropriate when such membership is necessary for enhancing Lecturers' subject matter expertise and/or support for student learning
- Purchase of textbooks and other necessary materials to support course design or revision
- Travel and expenses related to conference attendance
 - Includes air/train, transportation/taxis/fares, mileage for personal vehicle, rental car, fuel/tolls for rental car, parking, lodging, and meals while traveling

Examples of generally unallowable purchases using professional development funds:

- Business/First-Class travel
 - A Lecturer may inquire with their Dean's office about the possibility for an exception for business/first-class travel (i.e., when warranted by medical conditions, length of flight)
- Childcare
- Clothing
- Club memberships
- Computers and IT equipment
 - The University will issue computers to all benefits-eligible Lecturers as stated in Article 20.1.D
- Cost of commuting between home and campus
- Furniture for on-campus office
- Home office supplies/renovations
- Insurance (personal, equipment, rental, travel, etc.)
- Local network connectivity costs
 - e.g., subscription fees for iPads, cell phones, other devices
- Magazine subscriptions
- Moving and relocation expenses
- Payments to individuals using peer-to-peer apps
 - e.g., Venmo, PayPal, Cash App, Zelle, etc.
- Spousal, partner, or other family member travel
- Visa-related expenses