

## ULFA STUDY LEAVE RELOCATION FUND APPLICATION

\* Attach copies of documentation as required under Regulations of Study Leave Relocation Fund.

SURNAME: \_\_\_\_\_ FIRST: \_\_\_\_\_ MIDDLE INITIAL: \_\_\_\_\_

PERIOD OF LEAVE: FROM \_\_\_\_\_, 20\_\_\_\_ TO \_\_\_\_\_, 20\_\_\_\_

HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

1. Intended location of Study Leave domicile and dates: \_\_\_\_\_  
\_\_\_\_\_

2. Purpose of Study Leave (one sentence statement): \_\_\_\_\_  
\_\_\_\_\_

3. Will family members be accompanying you on study leave? \_\_\_\_YES / \_\_\_\_NO

a) What dates will family member be relocating for? \_\_\_\_\_ to \_\_\_\_\_

b) Please list the name(s) of family members 6 years of age or older (at commencement of leave):

\_\_\_\_\_  
\_\_\_\_\_

Please list the name(s) of family members under the age of 6 years old (at commencement of leave):

\_\_\_\_\_  
\_\_\_\_\_

4. What was the date and location of your last study leave? \_\_\_\_\_  
\_\_\_\_\_

a) If you have not received a study leave before, when was your date of hire? \_\_\_\_\_

## ULFA STUDY LEAVE RELOCATION FUND APPLICATION

### TRAVEL EXPENSES

Refer to Regulation C

#### AUTOMOBILE (SECTION (A) - PAGE 7-8)

If you're traveling by automobile, fill out the following information

DISTANCE (if using own vehicle)

$$\begin{matrix} \text{[ ]} & + & \text{[ ]} & \times & 0.555 & = & \$ & \text{[ ]} \\ \text{Outbound} & & \text{Homebound} & & & & & \\ \text{No. of km} & & \text{No. of km} & & & & & \end{matrix}$$

LODGING & MEALS WHILE DRIVING

Lodging

$$\$40.00 + \left( \begin{matrix} \text{[ ]} \\ \text{Per additional person} \end{matrix} \times \$5.00 \right) = \$ \text{[ ]} \times \begin{matrix} \text{[ ]} \\ \text{No. of days} \end{matrix}$$

Meals

$$\left( \begin{matrix} \text{[ ]} \\ \text{No. of adults} \end{matrix} \times \$20.00 \right) + \left( \begin{matrix} \text{[ ]} \\ \text{No. under age of 6 yr. old} \end{matrix} \times \$10.00 \right) = \$ \text{[ ]} \times \begin{matrix} \text{[ ]} \\ \text{No. of days} \end{matrix}$$

#### PUBLIC TRANSPORTATION (SECTION (B) - PAGE 8)

If you're traveling by public transportation, fill out the following information

MODE OF TRANSPORTATION

Airplane  Train  Boat / Ferry  Bus / Taxi  Other: [ ]

[ ] Quote #1 [ ] Quote #2

#### COSTS UPON ARRIVAL (SECTION (C) - PAGE 8)

Lodging

$$\$40.00 + \left( \begin{matrix} \text{[ ]} \\ \text{Per additional person} \end{matrix} \times \$5.00 \right) = \$ \text{[ ]} \times \begin{matrix} \text{[ ]} \\ \text{No. of days} \end{matrix}$$

Meals

$$\left( \begin{matrix} \text{[ ]} \\ \text{No. of adults} \end{matrix} \times \$20.00 \right) + \left( \begin{matrix} \text{[ ]} \\ \text{No. under age of 6 yr. old} \end{matrix} \times \$10.00 \right) = \$ \text{[ ]} \times \begin{matrix} \text{[ ]} \\ \text{No. of days} \end{matrix}$$

#### SHIPMENT COSTS (SECTION (D) - PAGE 8)

Shipment of personal effects. Please give your best reasonable estimate and evidence for shipping your research-related materials, to a maximum of \$700.00.

Rational:

[ ]

## TOTALS

\$ [ ]

\$ [ ]

\$ [ ]

\$ [ ]

\$ [ ]

\$ [ ]

\$ [ ]

TOTAL REQUESTED AMOUNT

\$ [ ]

DATE:

[ ]

SIGNATURE:

[ ]



## CHECKLIST

### *For ULFA Study Leave Relocation Application*

To ensure your study leave relocation application is complete, check and include the following:

Letter from the Dean/University Librarian approving your study leave, including the approved relocation destination and dates.

Letter from the VP Academic approving your study leave

Completed and signed application form.

If traveling by public transportation, travel quotes (minimum of 2) are required.

**NOTE: Incomplete application forms will be ineligible for consideration (see page 5) and will be returned.**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

January 21, 2020

TO: STUDY LEAVE APPLICANT

FROM: Sean Hayes, Executive Director

RE: **RESEARCH AND STUDY LEAVE 2020-2021**

I am writing on behalf of the Study Leave Relocation Committee because you have been identified as having been approved for Research and Study Leave in the academic year 2020-2021. If you are planning on relocating your residence for at least four months during your Research and Study Leave, please complete the enclosed application form and return it to [admin@ulfa.ca](mailto:admin@ulfa.ca) as soon as possible.

Completed Study Leave Relocation (SLR) applications are due on February 14<sup>th</sup>, 2020 (Friday before Reading Week). Incomplete applications will **NOT** be accepted and will be returned to you for revision. Applying prior to the deadline will allow you the benefit of a careful review by the SLR committee so that incomplete applications may be identified and recommendations to enhance your application made. Should the committee receive an incomplete application on the due date, you will be declined support.

Financial resources for this program are limited and the SLR Committee strongly encourages you to be diligent in completing your application. Please pay particular attention to regulation C.4 regarding approval from your Dean/Chief Librarian. **If the Dean's/University Librarian's letter fails to mention either the study leave location or destination, then you must include a copy of your original application.**

If you have any questions, please contact ULFA at 403-332-2578 or [admin@ulfa.ca](mailto:admin@ulfa.ca).

Thank you.

Sean Hayes

## STUDY LEAVE RELOCATION FUND

### PLEASE NOTE:

*The checklist, guidelines, and procedures documents provided in this package are intended to aid you in your application process. If you have any questions, please contact the ULFA office at 403-329-2578.*

Study Leave Relocation Applications are due **by 4:00pm February 14<sup>th</sup> 2020**. We encourage you to submit your application early to give yourself the extra time you may need to tweak your application before the Study Leave Relocation Committee makes its final decision. Partial or incomplete applications will not be accepted; however, if you are unsure about filling this application out correctly, contact the ULFA office before submitting your documents.

It is an unfortunate reality that as our faculty numbers grow and relocation travel takes members and families to various parts of the world, the amount of the Study Leave Relocation Fund continues to be stretched. Each year we face the possibility of prorating award amounts, causing the funding to become competitive. For this reason, the Study Leave Relocation Committee must adhere to the regulations for awarding funding. If you have a unique situation that may not fit within the guidelines and procedures, it is recommended that you include additional information explaining your situation to the Study Leave Relocation Committee.

Congratulations on your study leave and good luck with your application.

## **STUDY LEAVE RELOCATION FUND**

The Study Leave Relocation Fund is designed to assist financially those members of the faculty who are changing residence for academic reasons during their leave. This fund is administered by the University of Lethbridge Faculty Association, who shall be wholly responsible for the funds.

### **A. STUDY LEAVE RELOCATION COMMITTEE**

The Nominating Committee is responsible for filling vacancies on the Study Leave Relocation Committee. The committee is comprised of three regular members and one alternate member, each serving a two-year term. Members are not eligible to serve on this committee in the year in which they are applying to it in support of their own study leave relocation. In such instances the alternate member will be asked to assume duties for that round of applications. This committee, with the assistance of the Accounting Assistant, Financial Services as resource person and fund administrator, is responsible for:

- i. Dispersing the funds to applicants on the basis of procedures and regulations set out in this document
- ii. Reporting annually to the Executive of ULFA. This report should include a list of applicants, the amount awarded to each and, if necessary, rationale where a discrepancy exists between the amount applied for and actual award.
- iii. Monitoring the expenditures of authorized funds by checking receipts according to normal University procedures. If allocated funds are spent but cannot be accounted for, the Study Leave Relocation Committee shall inform the Executive of ULFA which will take the appropriate action(s).

### **B. PROCEDURES FOR APPLICATION**

1. Each January, once the names of all approved study leave applicants have been received, information packages and application forms pertaining to study leave relocation are sent from the ULFA office to them.
2. Each February (normally, on the Friday before Reading Week) prior to the academic year during which the study leave is to commence, the applicant must submit to the University of Lethbridge Faculty Association a completed application for Study Leave Relocation Award. The applicant must specify the dates for approved leave, location of the study leave domicile, and include an itemized estimate of relocation costs, supported by a minimum of two (2) quotations from different airline carriers (e.g. Air Canada, WestJet, etc) or agents (e.g. Expedia, Travelocity, etc).

The applicant will be awarded a Study Leave Relocation Award upon which claims may be made up to the approved specified maximum. The Study Leave Relocation Committee normally meets before the end of February to conduct its business and informs applicants of the outcome as soon thereafter as possible.

3. Claims for the relocation from the Lethbridge domicile to the study leave domicile must be submitted to the Accounting Assistant, Financial Services within thirty days of arrival at the study leave domicile. Claims for relocation from the study leave domicile to the Lethbridge domicile must be made within thirty days of the return to the Lethbridge domicile.
1. On request, an advance on a Study Leave Relocation Award may be obtained based on the estimated costs of a relocation from one domicile to another.

**C. REGULATIONS FOR APPLICATION**

1. The following expenses may be claimed, subject to the maximum specified for the Study Leave Relocation Award. All of the following are in Canadian funds.

Note that travel arrangements are normally made using one mode of transportation, such as air travel **or** automobile; however, the Study Leave Relocation Committee may consider the most reasonable, direct, and economical forms of transportation as an equivalent. Applications involving multiple modes of transportation may require additional explanation to the Committee. Applicants are expected to provide relevant information on travel costs to the committee

(a) Automobile Transportation Costs:

If a private automobile is used, the following formula is applied:  
.555 cents per kilometer by the most direct route, for one automobile. For example: domicile in Lethbridge to domicile near University of British Columbia.

Outbound	1158km	x	.555	=	\$642.69
Homebound	1158km	x	.555	=	\$642.69



Cost of lodging & meals for a reasonable number of driving days when supported by receipts:

Lodging maximum is \$40.00 for one person, plus \$5.00 for each additional person. Allowance for meals en route of \$20.00 per diem, per member of the family 6 years of age or older and \$10.00 for those under the age of 6 years old.

For example, 2 adults and 2 children (5 and 9 years old) travelling to Vancouver over 2 days.

**Outbound** Meals: 3 x \$20 + 1 x \$10 = \$70 x 2 days = \$140  
Lodging: 1 x \$40 + 3 x \$5 = \$40 + \$15 = \$ 55  
(one night) sub total \$195

**Homebound** Meals: 3 x \$20 + 1 x \$10 = \$70 x 2 days = \$140  
Lodging: 1 x \$40 + 3 x \$5 = \$40 + \$15 = \$ 55  
(one night) sub total \$195

TOTAL for lodging & meals **\$390**

(b) Public Transportation Costs:

Public Transportation includes travel by airfare, trains, etc.

Lowest generally available airfare (charter, economy airfare or equivalent, based on travel within the terms of the approved leave) from Lethbridge to point of domicile for each member of the family when supported by receipts.

*If air companies do not provide fare information for year of travel, use the following formula:*

*This year's cost + 5%. For example Air Canada to Toronto  
(Cost at March 2018)*

**Lethbridge to Toronto = \$923.30 + 5% = \$969.47 (year 2018)  
(include copy of current prices with your application)**

(c) Costs Upon Arrival (Lodging and Meals):

Cost of lodging and meals on the same basis as in C.1.(a) for a maximum of three days upon arrival at the study leave destination, when necessarily incurred.

(d) Shipment Costs:

Freight, cartage or cargo trailer rental for personal effects primarily research-related (not including household furnishings) from the Lethbridge domicile to the study leave domicile and return, when supported by receipts: maximum \$700.00.





2. Only those faculty members/professional librarians who are part of the bargaining unit are eligible to apply for assistance from the fund.
3. The fund is designed to aid those who have a study leave approved by the normal process; those on administrative leave would not normally be eligible. Tenured members on retraining or upgrading leave are also eligible.
4. The applicant is required to submit a copy of the letter from his/her Dean/University Librarian who approves the leave. The letter should include details of approved relocation, including destination, dates and the nature of the leave.
5. Only applicants changing residence, either with or without families, for academic purposes, are eligible for assistance from the fund. A move shall be considered relocation if it includes change of domicile for a prolonged period of time, typically considered 4 or more months. Proposed relocations for periods of less than 4 months will be evaluated on a case-by-case basis.

Maintaining domicile in one particular location for the entire leave does not exclude research trips, which may be taken periodically from that location. Note, however, such research trips will not be funded by the Study Leave Relocation Fund.

6. Children who have completed high school shall not normally be considered part of the family unit.
7. A person is eligible for funding for a full year of study leave or two six-month study leaves every seven years. The seven-year period begins with the completion of a funded study leave.
8. The maximum for a Study Leave Relocation grant is 15% of the floor of the Assistant Professor salary every six years, or half the amount every three years.

NOTE: If members wish, they may claim full expenses for a half-year (6 months) leave. However, if the member relocates for a second 6 months, within that seven-year period, he/she may claim only the balance remaining of the maximum grant, i.e. remainder of 15% of the floor of the Assistant Professor salary not spent for the previous relocation.

9. The amount of Study Leave Relocation Fund will be \$35,000 per year. The amount will be reviewed by the Economic Benefits Committee before salary negotiations take place.

10. If the Study Leave Relocation Committee approves expenditure in excess of the funds in the Study Leave Relocation Fund in a given year, each applicant shall be awarded a proportion of his/her approved expenses. This proportion would be the ratio of the funds in the Study Leave Relocation Fund (bearing in mind regulations 9 & 11) to the total of the approved expenditures.
11. Funds received but not used according to the approved grant application and the rates in C.1 must be returned. Unspent monies are returned to a special Study Leave Relocation Surplus Fund and in years when the total amount to be awarded exceeds \$35,000, before any pro-ration takes place, up to one-third (normally) of the accumulated unspent monies may be added to the \$35,000. Particularly since funds may need to be awarded on a prorated basis, we strongly encourage you to work at getting the best possible rates for your particular mode of transportation and to give thoughtful consideration to putting your application requests together. What you don't need or use goes back into the Surplus Fund, not to others who could have used the full amount they were eligible for in that year.

## **DURING RESEARCH AND STUDY LEAVE**

### **1. General Effect:**

The authoritative general reference for this section is Article 13 of the Handbook.

A member awarded research and study leave receives his/her regular salary during the period of leave. Premiums, contributions, fees and taxes are deducted from monthly salary in a normal fashion, enabling continuity of economic benefits. This method of paying necessary costs is assumed in discussions below unless otherwise stated.

The descriptions, which follow on University Group Benefit Plans, are provided in summary form only and represent only part of full policies available through Pensions and Benefits.

Faculty aged 65 and over are eligible for coverage up to 30 days out of province travel only and may be subject to limitations under the following benefit plans. Please note Schedule B of the Faculty Handbook or contact your Pension and Benefits Department.

### **2. Alberta Health Care Insurance Plan:**

Alberta Health Care Insurance Plan, for a member awarded research and study leave are the same as for members pursuing regular duties. Coverage remains in force for in province or out of province, but any member leaving the province for more than one year must notify Alberta Health Care in writing (to include information re: location and purpose) to protect the validity of potential claims. If you are on educational leave from employment for advanced training or study leave that takes you out of the country for more than 12 months (even one day more), to a maximum of 24 consecutive months from the date of departure, you must contact Alberta Health Care for further requirements. Your AHCIP (or similar provincial health care coverage) need to be in force for the Out of Province Emergency Travel Benefits (see point 4) to remain valid.

When travelling outside Alberta:

1. Know how long you can be absent from Alberta and still have AHCIP coverage,
2. Know what services are insured and uninsured under the AHCIP,
3. Know what the AHCIP covers outside Alberta but within Canada,
4. Know what the AHCIP covers outside Canada,
5. Carry your AHCIP card, and
6. Ensure that your have sufficient travel medical insurance.

### 3. Extended Health Benefits:

Outside Alberta, Extended Health Benefits provides coverage for hospital charges. Ambulance services to the nearest hospital are also covered, and are not restricted to ground service. Quebec Medicare does not recognize Alberta Health Care, therefore, payment will be required at time of treatment.

- (a) **Air Ambulance Services** – Eligible Expenses for air transportation to or from the nearest qualified medical facility able to provide medical care is also covered in the event that normal ground transportation is not available or in the best medical interest of the patient.
- (b) **Ambulance Services** – Eligible Expenses for services of a professional ambulance required to transport a patient, who is ill or has an injury, to or from the nearest qualified medical facility able to provide medical care. The ambulance must be licensed to operate in the jurisdiction where the service was rendered.

**Deductible:** \$25 under Single or Family Coverage each Benefit Year  
Deductible combined with Hospital and Extended Health Benefits

**Active Treatment Hospital:**

*Private Room* \$80 per Participant per day for Private Room accommodation in the Participants province of residence  
*Semi-Private Room* \$48 per Participant per day for Semi-Private Room accommodation in the Participants province of residence

### 4. Out of Province Emergency Travel Benefits

Of special interest to travelers, the Out of Province Emergency Travel applies to emergency out of province medical costs. Out of Province coverage will cover the physicians' charges up to the level that is "reasonable and customary" for the area where the **emergency** costs are incurred to a maximum of \$5,000,000 per person.

If you are being treated outside Canada and your medical condition permits you to return to Canada, and Alberta Blue Cross request you be repatriated and you decline to return, ABC will no longer have liability for your medical cost from that point on. Once you are treated for an event (outside a hospitalization with a request to repatriate) and you do not return to your province of residence, **any further/ subsequent treatment for the same event will not be considered an emergency and therefore you will not be not covered for this same event.** Depending on your destination you may wish to consider purchasing extra coverage.

Members should have their Blue Cross cards (emergency numbers are listed on the back) claim forms are available online. Travel Assistance Service must be contacted within 24 hours.

Send your Out of province medical claims directly to Alberta Blue Cross along with a completed "Travel Claim Form", making sure to complete an Alberta Government Insurance Claim Consent and Authorization form. If medical expenses are for dependents over 18 years of age, an Alberta Government Insurance Claim Consent and Authorization form must be signed by the dependent. Visit [www.travel.gc.ca](http://www.travel.gc.ca) to check for Travel Warnings. If a country is 'Red Flagged' travel insurance is VOID.

**5. Dental Insurance:**

Dental Insurance is affected by neither the member's leave status nor the locale where a claim originates. Coverage will be paid using the 2016 Alberta Blue Cross Dental Fee Schedule.

Dental treatment as a result of an accident must be rendered within one year under the extended health plan. An accident covers only sound teeth; the rest are covered by regular dental insurance.

No additional costs are associated with leave coverage. Members should take a supply of claim forms before leaving the province for a prolonged stay.

**6. Group Life Insurance:**

Level of coverage is not affected by leave status or locale.

**7. Long Term Disability Insurance:**

The level of coverage is not affected by the leave status or locale. If you are totally disabled while temporarily assigned outside Canada, you must return to Canada in order to receive Long Term Disability Insurance Plan Benefits.

**8. Professional Supplement:**

A member awarded research and study leave qualifies for the Professional Supplement.

**9. Academic Pension Plan:**

Members who are currently participating in the Universities Academic Pension Plan continue to make contributions (as well as prior service) and have contributions made by the University on their behalf.

**10. Accidental Death and Dismemberment:**

a. Employees travelling on University business, using the American Express Corporate card, will be provided with the following insurance coverage:

*Travel Accident Insurance to a maximum of \$500,000 payable to the American Express cardholder/beneficiary; Car rental theft and damage insurance; Flight and baggage delay; and hotel/motel burglary insurance.*

b. If an insured sustains accidental loss of life for which an amount of Principal Sum becomes payable under the program, repatriation benefits up to \$10,000 will be paid for expenses incurred for the return home of the insured's body (including preparation charges for transportation). The death must occur at least 50 kilometers from the insured residence.

c. If the employee is currently covered under SSQ AD&D premiums and coverage will continue. Again, it is recommended that members relocating on study leave review the medical cost of their new locale compared to Canadian costs, and determine if extra coverage is needed.

**11. Tax Implications**

Members traveling outside of Canada are responsible for any additional tax implications imposed by the host country.

Funds received to relocate family members are taxable benefits according to the rules and regulations of the Canada Revenue Agency and are taxed in the hands of the applicant. Members are advised to plan accordingly.

**12. During Research and Study Leave**

If university property such as equipment or computers funded from central, grant or research dollars are leaving Canada, please contact Financial Services to find out how to report the updated location for the asset as well as determine if any export regulations apply.

## **SUPPLEMENTAL INFORMATION**

### **TRAVEL FUND**

Members relocating on study leave may apply for assistance from the Travel Fund on the same basis as other faculty members.

### **UNIVERSITY RESEARCH FUND**

Members relocating on study leave may apply to the University of Lethbridge Research Fund on the same basis as other faculty members.

### **PREPARING FOR RESEARCH & STUDY LEAVE TRAVEL (MISCELLANEOUS)**

A member relocating on study leave should take claim forms for Extended Health Benefits and Dental Insurance or be able to access Pension and Benefits website or Blue Cross website to print online. If the member is leaving Canada for any more than one month, they should advise the Pension and Benefits Department of Human Resources and pick up a travel claim form, which contains “Schedule ‘B’ Agreement”.

If the home of the member relocating on study leave is to be leased, consideration should be given to obtaining the services of a professional tax consultant. Please refer to Revenue Canada’s Interpretation Bulletins tax folio S5-F1-C1 and IT-393, respecting resident vs. non-resident status and election to avoid capital gains tax on personal residence.

Current immigration guidelines require non-Canadians working in Canada by virtue of landed immigrant status or work permit to sign a declaration of intention before leaving the country for a period exceeding 183 days. If such a declaration is not signed, a prolonged visit outside Canada could jeopardize the individual’s prior immigration status. Landed immigrants are required to have their Permanent Residency Card with them or may encounter problems re-entering Canada.

Lastly, as a supplement to the health and insurance package, arrangements for a comfortable emergency line of credit should be made with the member’s bank.