

Appendix R. Postdoc Financial Assistance Committee Terms of Reference

Name

The Postdoc Financial Assistance Committee

Term of the Committee

Applications for postdoc financial assistance program will be adjudicated by the committee in three rounds each fiscal year with submission deadlines: Aug 31th; Jan 31th and April 30th. The committee aims to respond to all applications within one month.

Budgetary Details

From the local fraction of postdoc dues, \$10,000 is allocated to the Postdoc Financial Assistance (PFA) program to assist the financial needs of members when all other avenues have been exhausted, with the following categories: medical emergencies, child care, personal emergencies and academic/conference travel. The allocation for each round is preliminarily as \$2,500 for Aug 31th, \$5,000 for Jan 31th and \$2,500 for April 30th; and the committee has the discretion to alter the preliminary allocation.

The Committee is encouraged to review disbursement criteria to compare demand upon the fund to the available funds within the account. The committee may increase benefit amounts and/or create new programming to meet the needs of the members, if and only if funds are available. The purpose of the Financial Aid Fund is to provide the greatest benefit to members in the greatest amount of need.

Members

1. Chairperson: a Postdoc Chair, or a designate elected by the Committee.
2. Ex Officio, Voting Member: the President and the Postdoc Chair
3. Maximum of 8 members, but the committee can vote to increase the membership cap. An increase in cap shall not increase the budget for the committee.
4. Members will be selected and elected by the Executive Committee after a call-out has been sent to the membership.
5. Committee members shall meet several times and coordinate efforts to choose the recipients of financial aid.
6. Meetings will be held at the PSAC Local 610 Union Office, Somerville House Room 1313.
7. Members will receive an honorarium for their contribution.

How to Apply

Members should contact the Local Office Manager staffpsac610@gmail.ca to express interest in joining the Committee. The Executive Committee will consider all members who express interest.

Meetings

Meeting Duration and Location

Meetings will be held at the PSAC Local 610 Union Office, Somerville House Room 1313. Meetings shall be held monthly and scheduled for two (2) hours, although they may take less time.

Attendance

Physical attendance at meetings is required, with the exception of remote participation where the Chair deems it appropriate. To maintain membership on the Committee, members shall be physically absent for no more than two meetings per academic year, except under extenuating circumstances (e.g., illness, research travel, bereavement).

Non-disclosure Policy

Members of the committee shall hold confidential all the information related to applications, circulating at the meetings of the committee. This information related to the applications is not to be disclosed or shared with a third party without the written permission of the applicants.

Deliverables

The Committee shall communicate its decisions to the PSAC Local 610 Office Manager.

Eligibility:

To apply you must have held a Postdoctoral Associate (PDA) contract at any point during the fiscal year (May – April) (exceptions may be granted if you are on leave). Please submit one application form per deadline per member. You may apply for all applicable categories on one form. Expenses incurred within the last 12 months can only be claimed.

Disbursement Policy for the Financial Assistance Committee

The Financial Assistance Fund exists to provide assistance to members who experience unexpected financial need. This fund is structured as a series of streams to meet the unexpected needs of postdocs who have exceptional demands upon their finances. This policy exists to define such needs, and how the Committee is authorized to respond to and assist applicants.

The PFA Committee funds applications according to preferential criteria and gives priority to

unexpected and unavoidable expenses. The Financial Aid Fund is limited and, unfortunately, not all applications can be approved. You may receive a bursary that was not the full amount of your request. These circumstances are based on several factors: need, available funds, and number of applicants.

The committee aims to respond to all applications within one month. Applicants will be notified of decisions by email, and if your application has been successful, you can pick up your cheque at the Local's office.

The application process assures your confidentiality:

1. Each applicant is assigned an ID number.
2. Applications are reviewed without any identifying information.
3. Committee members must sign a Non-Disclosure Agreement before adjudicating applications.
4. Applications are kept on file for future use in characterizing members' needs for future rounds of negotiations.

Applications must be filled out in full to receive consideration. The Committee will verify the receipts appended to the application. Only documented expenses for which receipts are included shall be considered. Please include original receipts, or photocopies of original receipts, not bank statements.

While the Committee has the authority to fund or deny any application, the following criteria express the Committee's preferences.

Unlikely to be funded:

- Pet care expenses
- Passport fees, Visa applications or permanent residency fees
- Vehicle maintenance expenses (repairs, tires, etc.)
- Textbook purchases, tuition fees
- Technology purchases, unless these can be explicitly justified
- Conference fees or membership fees

Exceptions in the above cases, while extremely unlikely, are possible, at the Financial Assistance Committee's discretion based upon the applicant's justification.

A member may receive maximum \$500 per fiscal year from the program. If an application is granted less than the amount requested, the applicant may apply in the next round for the remainder of the same expense. However, new and previously unfunded claims take precedence. In addition, the committee cannot consider expenses for which the receipts are more than 12 months old. **Applicants who have received the maximum disbursement (\$500 per fiscal year) may not be eligible to apply again within the same fiscal year.**

The following types of expenses can be funded, with appropriate justification:

1) Medical Emergencies

This category covers all the **medical expenses**. You may also claim for a child, spouse, common-law partner, or dependant (e.g., elderly parent). These include emergency medical or dental bills, including bills incurred outside Canada.

Please ensure you have applied for and exhausted your health or spousal insurance plan (if you have one) and Health Care Spending Account (HCSA). If the expense was not fully covered by insurance plan or HCSA, you need to explain and provide document proof why it was not covered. If your receipt is covered by an insurance plan or HCSA and you have not yet applied for reimbursement then you must first apply before applying for financial assistance. You also need to explain how and on what basis you pre-allocated your \$1,400 flexible credits.

If dependant is not a child, spouse, or common-law partner, please provide sufficient proof such as a tax return where he/she is declared as a dependant.

Example type of expenses: vision care, prescribed medication, dental, physiotherapist, psychologist, psychotherapist, naturopath, osteopath, chiropractor, occupational therapist, podiatrist, chiropodist, acupuncturist, etc.

2) Child Care

This category covers expenses related to child care costs. Please enclose the appropriate documentation and receipts with your application. Only receipts from licensed childcare providers and programs will be considered for the subsidy. For a list of licensed child care providers, go to <http://www.iaccess.gov.on.ca/LCCWWeb/childcare/search.xhtml>. Members are also encouraged to check if they are eligible for Child Care Fee Subsidy from City of London: <https://www.london.ca/residents/children-youth/child-care/Pages/Child-Care-Fee-Subsidy.aspx>

3) Personal Emergencies

This category covers all unexpected expenses other than regular household costs. To apply in this category, the applicant must provide substantial documents to support their claim. The application will be reviewed by the committee on the basis of what is submitted. Please ensure you include receipts and a rationale for the emergency.

Examples of eligible funding include but are not limited to: bereavement travel expenses, financial difficulties related to separating from a spouse or partner and the loss of property due to an unforeseen catastrophe (house fire, flood, etc.). Know that the Financial Assistance Committee values your privacy. Any personal information shared with the committee is kept confidential.

4) Academic/Conference Travel

This category covers **expenses** related to academic work and/or conferences for applicants who are not fully funded for the costs by another source (supervisor's grant or Professional Expense Reimbursement (PER) account). Please provide supporting documents, such as a letter from supervisor/department or proof of funding of that was sought but not approved. The applicant must also provide documentation of their conference registration, travel and lodging expenses, and proof of participation as a presenter such as an itinerary of conference.

This Postdoc Financial Assistance Fund is created as a pilot program that seeks to address unexpected financial burden of the postdoc, and also to gather vital data on financial struggles of the membership. The Committee and PSAC Local 610 may use non-identifying information from applications.

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