

## Terms of Reference

### BCGEU Okanagan Enhanced Education Fund

#### 1. About the BCGEU Okanagan Enhanced Education Fund

The intention of the BCGEU Okanagan Enhanced Education Fund is to provide staff with additional sources of funding directly related to academic pursuits at any degree, diploma or certificate granting post-secondary institution in Canada, Trades and Apprenticeship program, or Professional Association (with a national or provincial chapter) that offers a recognized designation.

#### 2. Enhanced Education Fund Committee

The Committee will consist of four members: two from BCGEU membership and two from UBCO management.

The BCGEU membership will appoint two members to sit on the Committee for a two year term commencing April 1st in any given year. Where possible, the two BCGEU appointments will begin in alternating years in order to provide continuity on the Committee.

Two management representatives will be appointed by UBCO for a 2 year term. All Committee members are eligible for re-appointment.

#### 3. Eligibility

The awards amount will be up to \$1,500 per regular employee, per year. Auxiliary employees who meet the eligibility requirements are eligible for an award of up to 50% of the amount available to regular employees.

All BCGEU Okanagan employees who have completed their probation period (910 hrs) will be eligible to apply for the BCGEU Okanagan Enhanced Education Fund. Awards under this fund may be made in addition to the current PD Funding amounts. Employees may apply for both funds, but approval from one fund does not guarantee approval from the other fund.

#### 4. Rules

- i. Funding applications are approved on a first-come, first-served basis and are subject to the availability of the overall budgeted funding for the year.
- ii. Recipients must meet all eligibility requirements when applying for an award.
- iii. Recipients must be studying on a full or part-time basis during the fiscal year of application.

- iv. Recipients must present proof of enrollment in course of study before receiving their award. Recipients may apply yearly for the same continued course of study.
- v. Applications for reimbursement can be submitted at either application intake times for a course of study started and paid within the current fiscal year.
- vi. Recipients who do not attend or withdraw mid-year from the Educational Program and/or course for which they have received funding must repay the money, unless there are extenuating circumstances that are approved by the Enhanced Education Fund Committee.
- vii. In order to apply for further funding on an ongoing basis, Recipient must provide documentation of completion of course from previous funding. Employees can appeal this provision, in writing, if they feel there are extenuating circumstances.
- viii. There are two application-closing dates per fiscal year. All applications must be received by 11:59pm, May 1<sup>st</sup> and 11:59pm October 31<sup>st</sup> for consideration by the committee. Late applications will not be considered, and incomplete applications will be returned for completion when time permits.
- ix. Award recipients will be informed within a month of the application deadlines.
- x. An HR Associate will review applications to ensure they are complete and meet the eligibility criteria of the program and are within the available individual funding limits.
- xi. By accepting this award recipient acknowledges that the funds awarded are being applied to the educational opportunity and that the costs incurred have not been covered by other funding sources.
- xii. Any time off required by the employee to pursue the approved course of study will be subject to the following operational considerations:
  - There should not be an additional cost to the department
  - Time off with pay will only be approved if the employee's work does not require to be backfilled, and the employee can make appropriate arrangements with their supervisor to complete their normal work
  - Subject to normal approval processes the employee may utilize vacation time, banked time or unpaid leave in order to attend their course of study.

## **5. Ineligible Expenses**

The following expenses will not be considered for funding:

- i. Professional and licensing fees or dues (if and when required by current job)

- ii. Basic job-related skill development and training that is required for, or integral to, effective functioning in a position. (This is the responsibility of the department.)
- iii. Course or programs an employee is expected to take at the sole request of a supervisor.
- iv. Recreational and general interest courses, unless there is an explicit component of the course which develops workplace related skills. Such courses will be evaluated on a case by case basis (a clear rationale for the applicability of the course must be provided to the Committee).
- v. Courses normally covered under tuition waivers as per Article 56 unless the credits available have already been exhausted.

## **6. Application Process**

The designated HR Associate will review each claim to ensure it is consistent with the eligibility criteria, and within available individual funding limits. Only complete applications will be forwarded to the BCGEU Okanagan Enhanced Education Fund Committee for review. Incomplete applications will be returned to the applicant for completion and resubmission within the deadlines.

Upon review of the application by the BCGEU Enhanced Education Fund Committee, you will receive notification of approval or denial via email.

Submit applications to:

Attn: HR Department (BCGEU Enhanced PD Fund)  
ADM 002, 1138 Alumni Avenue  
Kelowna, BC V1V 1V7

## **7. Approval and Reimbursement**

Reimbursement is made by direct bank deposit. If the upfront costs were paid by the department on the employee's behalf, the HR Administrative Assistant will arrange reimbursement to the department by Journal Voucher transfer. In either case, the employee will receive an approval/confirmation email once the award has been processed. The funding provided is not included as taxable income on an employee's T4 slip. This means that staff cannot claim the value of any funds received through this program as part of a tuition tax credit or for any other credit on their annual tax return. Please refer to [Canada Revenue Agency – Eligible Tuition Fees](#) for more information.

## **8. How to Apply for Reimbursement of Expenses**

Once the application is approved, employees will be required to pay upfront for eligible Enhanced Education Fund Activity or arrange to have department pay upfront prior to reimbursement. The reimbursement process may take 14-21 business days. The reimbursement process is as follows:

- i. Complete the [BCGEU Expense Claim Form](#) (PDF), ensure all required documentation is attached:
  - Payee, as it should appear on cheque or JV – individual or department
  - If department, attach copy of PCard (Visa) statement showing transaction and a copy of department GL account(s) printout that shows transaction.
  - attach original receipts and supporting documentation as noted on the claim form
  
- ii. Send the completed claim form by UBC internal / campus mail channels or drop off **within 14 days of the payment date** (as noted on receipt) to:  
**Human Resources – BCGEU Okanagan Enhanced Education Fund**  
Attn: HR Associate  
ADM 002, 1138 Alumni Avenue  
Kelowna, BC V1V 1V7

**Emailed claim forms are not accepted**

## **9. Cancellation**

Employees can request to withdraw their application and/or approved funding by writing to the Committee within two weeks of cancellation. Employees may not use previously approved funding for a different purpose.

Employees who do not attend the Educational Program for which they have received funding must repay the money. Employees can appeal this provision, in writing, if they feel there are extenuating circumstances.