

## **UBC OKANAGAN & BCGEU SUPPORT STAFF**

### **PROFESSIONAL DEVELOPMENT FUND**

#### **TERMS OF REFERENCE**

In accordance with Article 55 – Staff Development – of the collective agreement between University of British Columbia Okanagan and the BCGEU, a professional development fund for support staff is administered by a joint committee.

#### **1. Committee Membership and Terms of Appointment**

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 1<sup>st</sup> 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 two year term.

All Committee members are eligible for re-appointment.

#### **2. Eligibility for Professional Development Funding**

Eligible employees can access funds for approved professional development to a maximum of \$1,500.00 per fiscal year (April 1 to March 31). 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 employees under this Collective Agreement who have completed their probation period (910 hours) will be eligible to apply for a staff development leave and/or financial assistance.

Employees approved for Professional Development Leave are entitled to up to 20 paid working days, pursuant to Article 55.4 of the collective agreement. Funding to pay wages for employees on PD leave is separate and is not paid from the individual's Professional Development allotment.

Human Resources will provide the Support Staff Professional Development Fund Committee (Committee) with a current list of eligible BCGEU employees, upon request.

### **3. Eligible Professional Development Activities**

All eligible activities must be related to professional development that enhances the knowledge, skills, performance, or career progression of an employee at the University.

Eligible expenses may include fees related to a variety of learning opportunities such as:

- courses that are part of a diploma, certificate or degree program;
- individual course, seminars, workshops, conferences, including web-based learning;
- registration and membership fees;
- materials, supplies and books.

Reasonable travel and associated expenses, including accommodation, for out-of-town conferences, workshops and seminars are also eligible (as per UBC travel policy 83).

All professional development activities must be provided by an association that is in the business of career related training or upgrading, or a service provider that is in the business of educating.

### **4. Ineligible Expenses**

The following 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. Courses 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 waiver as per Article 56 of the collective agreement.

### **5. Administrative Guidelines**

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.

Course or program dates will determine the fiscal year from which funding is allocated.

Funds remaining in the Support Staff Professional Development Fund at the end of a fiscal year will be carried forward into the next fiscal year.

Approved funding for individual professional development activities will *not* be carried forward into the next fiscal year.

Receipts for allowable expenses, in accordance with Articles 64 and 65 of the support staff collective agreement, must be submitted to HR within 6 months prior to or after your PD activity purchase date and within the current fiscal year.

Costs incurred by a department to replace staff approved for Professional Development leaves ("Staff Replacement Costs") to support attendance at approved courses, conferences and approved education leave will be covered as follows. The first five days of staff replacement costs will be paid from the Support Staff Professional Development General Fund. This fund will pay a further 50% of the staff replacement costs for up to an additional 15 days. These funds will be paid at completion of the leave. The balance of actual costs incurred for replacement staff from other resources should be worked out between the department and individual. Options may include departmental coverage, SSDF entitlement, vacation and leaves of absence without pay.

Staff replacement costs to support activities (such as completing major assignments like a thesis, field work, studying for certifications), required to complete approved courses, certificate or degrees programs will be considered according to the following guidelines:

- The employee agrees to provide proof of completion of activity within six months of beginning the SSDF leave (e.g. certificate of course completion, receipts for completed exams, etc.)
- If the activity is not completed within six months after the date the leave has commenced, the Committee reserves the right to request a refund of the monies provided to support backfill for the educational leave.

## **6. Professional Development Funding Reimbursement**

- confirm your BCGEU PD Fund eligibility and available balance in [Faculty & Staff Self Service](#) (Click the "staff PD" tab to view your funding details);
- review the [Guidelines for BCGEU PD Fund](#) (PDF);
- pay upfront for your eligible PD activity or arrange to have your department pay upfront on your behalf;
- complete the [BCGEU PD Fund Expense Claim Form](#);
- attach receipts & required supporting documentation as described on the claim form;

- send or drop off the completed claim form by UBC campus mail 6 months prior to or after your PD activity purchase date and within the current fiscal year to:

**Human Resources – BCGEU PD Funds**

1138 - ADM002 Alumni Avenue  
Kelowna, BC V1V1V7

We require your original claim forms and receipts. Please do not email in your claim

**7. 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 professional development event for which they have received approved funding must repay the money. Employees can appeal this provision, in writing, if they feel there are extenuating circumstances.

**8. Reports**

A monthly expenditure report will be provided to the Committee from Human Resources. The report will include the names of the employees, the departments, the amounts of the grants, and a brief description of the professional development activities.

**9. Review of Terms of Reference**

The Committee will review the Terms of Reference annually, updating them as needed.