



BCGEU Staff Professional Development Fund

UBC – Okanagan

Terms of Reference

1. Purpose of the Program

The University and the British Columbia General Employees' Union at UBCO support the principle of ongoing professional and skill development of employees.

In recognition of this principle, the University and the BCGEU established a funding program to support individual professional and skill development under [Article 53 Staff Development](#) of the collective agreement.

The intent of the BCGEU Okanagan Professional Development Funds is to assist employees in maintaining and improving knowledge and skills relative to the employee's responsibilities or to their career development at the University. It is recognized that both employees and the University benefit from staff development. Employee Eligibility Criteria

- 1.1. All employees under the BCGEU agreement who have completed their probation period will be eligible to apply for a staff development leave and/or financial assistance.
- 1.2. Employees on approved temporary leaves will have their eligibility reviewed by UBCO Human Resources on a case-by-case basis.
- 1.3. Employees who will be ending employment with the University on a voluntarily or involuntarily basis are ineligible once notice has been served.

2. Type of Funding

2.1 General Staff Development Fund

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. See [UBC Business Expense Policy FM8](#).

2.2 Enhanced Education Fund

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

2.3 Employees may apply for both funds, but approval from one fund does not guarantee approval from the other fund.

3. Funding Amount Criteria

3.1 Regular employees will be eligible to access funding up to a maximum amount of **\$1500** each fund, per UBC fiscal year (April 1 to March 31), on a first-come, first-served basis, subject to the availability of the overall budgeted funds each year.

3.2 Auxiliary employee will be eligible to access funding up to a maximum of **\$750** each fund, per UBC fiscal year (April 1 – March 31), on a first-come, first-served basis, subject to the availability of the overall budgeted funds each year.

3.3 Employees may view their PD Fund plan enrollment, claim history and available balance online through **Workday's Reimbursable Allowance Plan screen**. From your Workday home page, click on "View all Apps". On the next screen, click on "Expenses" and then click on "Reimbursable Allowance Plan Activity" to view.

4. Staff Development Eligibility Criteria

4.1 This funding program assists employees to access learning activities that will maintain and improve knowledge and skills relative to the employee's responsibilities **or** to their career development at the University.

4.2 Typical eligible expenses include:



- a) Course tuition plus related textbook purchases that are part of a diploma, certificate or degree program.
- b) Professional Development workshop fees for workshops offered by UBC Human Resources – [Workplace Learning Ecosystem \(WPL\)](#)
- c) Registration fees & material costs for individual courses, workshops, seminars or conferences.
- d) Exam fees.
- e) Professional memberships (only when **not** required by current job).
- f) Resource books and online subscriptions purchases for self-directed study.
- g) Coaching sessions provided by an [ICF](#) Certified coach.
- h) Travel expenses to attend out-of-town conferences or other unique learning opportunities not available locally, in accordance with [UBC Travel Expenditure Guidelines](#).
- i) Staff Replacement Costs – Costs incurred by a department to replace staff approved for Professional Development leaves to support attendance at approved courses, conferences and approved education leave (such as completing major assignments like a thesis, field work, studying for certifications, required to complete approved courses, certificate or degree programs) will be paid by the BCGEU PD Fund for up to 20 working days.

4.3 Typical ineligible expenses include (but are not limited to):

- a) Employee attending a course or program at the sole request of a supervisor.
- b) Required training to meet minimum job requirements in an employee's current position
- c) Professional memberships fees required by current position.
- d) Activities taken for health and wellness (for example: nutrition, ergonomics, EFAP, mental health support, mindfulness & meditation, domestic violence support, healthy workplace initiatives), general interest, or recreational purposes.
- e) Ancillary student fees associated with credit courses or programs.
- f) Local travel expenses such as meals, transportation or parking within Kelowna and greater area.
- g) Courier or mail services.
- h) Software applications (such as Adobe Creative Suite or MS Office).



- i) All electronic devices and any associated data plans (laptops, e-readers, tablets, cell phones).
- J) All work equipment and supplies.

4.4 The individual funds available through this program are not intended as a substitute for departmental funds currently spent on employee development. Rather, these individual funds are provided in addition to any budgeted departmental funds (where available) as a way to increase and enhance employee access to development opportunities.

4.5 Departments are responsible for providing employees with job required training, certification or licensing. The costs associated with these required activities are a departmental responsibility and are not eligible for reimbursement through this funding program,

5. Staff Development Eligibility Criteria

5.1 If a selected professional development activity occurs during working hours, an employee must receive manager approval for time off in advance of making any commitments to attend a PD activity. The leave may be taken only at a time mutually agreeable to the supervisor and the employee(s). Approved leave shall be at full salary unless mutually agreed otherwise by the employee(s) and the supervisor.

5.2 In cases where an employee's chosen activity is a relevant [professional development workshop](#) offered by UBC Human Resources – Workplace Learning Ecosystem (WPL), time to attend during regular work hours should be granted with pay.

5.3 Employees submit PD fund claims for reimbursement directly through **Workday** at <https://hr.ubc.ca/working-ubc/welcome-workday> . For step by step instructions, as well as general resources and help with Workday, visit the Integrated Service Centre at <https://isc.ubc.ca/> . After logging in with your CWL, employees can search the knowledge base for instructions on how to submit a PD Fund expense report. (search terms “Claim expenses against my PD Funds” or “Transfer PD Funds reimbursement to my department?”).

5.4 **Out of Pocket Purchase Reimbursement** – In Workday, professional development fund expense reports are used by employees to make claims against their assigned UBC Professional Development Fund. Receipts must be included.

5.5 **UBC VISA Credit Card Purchase Direct Reconciliation** — In Workday, professional development fund expense reports are used by employees to reconcile corporate credit card



transactions against their assigned UBC Professional Development Fund (applies only if the UBC VISA card is assigned to the PD Fund claimant). Receipts must be included.

5.6 **Home Department Reimbursement Credit** – In Workday, Request Questionnaires are used by employees to initiate PD Fund claims for departmental reimbursements when purchases were made using department funds on behalf of the employee. These purchases could be by Supplier Invoice Payment, Corporate Credit Card charge (used when UBC VISA card is not in the claimant's name), or Internal Service Delivery transaction. The Workday request type is called "PD Fund Claim – Reimburse My Department ". Receipts and copy of the general ledger entry must be included.

5.7 PD Fund claims, with receipts included, **must be submitted online through Workday within 90 days of the original purchase date** (as shown on the receipt) to qualify for funding. After 90 days, a receipt is no longer eligible to submit for reimbursement. Please note that a PD Fund claim may be submitted as soon as a purchase has been made and can be before the activity start date.

5.8 Workday authorization of PD Fund claims must be provided by an employee's direct manager through Workday online workflow (authorizing managers must be in M&P, Faculty or SUD level positions).

5.9 Individuals submitting PD Fund expense reports (claims) in Workday should allow up to three weeks for the approval workflow to be completed and for Human Resources to process the reimbursement through Workday.

5.9.1 In the event of a cancellation of an approved and processed PD Fund claim, it is an employee's responsibility to contact UBC Human Resources and repay UBC for any funds received.

5.9.2 The funding provided is considered a non-taxable benefit. Employees who receive a tax certificate from an educational institution for tuition reimbursed through this PD Fund should not claim this amount on their annual tax return. Please refer to the [Canadian Revenue Agency - Eligible Tuition Fees](#) webpage for more information.



6. Program Administration

6.1 The fund will be centrally administered by UBC Human Resources. General information on the BCGEU Staff Development Fund will be provided on the Human Resources website.

<https://hr.ok.ubc.ca/learning/profdevl/bcgeu-pd/>

6.2 The staff development fund terms of reference will be set and reviewed annually by the BCGEU joint labour management committee

6.3 The status and usage, including approvals and denials of the fund, is reported to the BCGEU joint labour management committee quarterly.

To ensure accessibility and fairness in the distribution of yearly budgeted funds the following will apply:

6.3 'Year' refers to **the period April 1 to March 31 (The UBC Fiscal Year)**.

6.4 Access to overall annual budgeted funds is provided to eligible employees on a first-come, first-served basis. If the overall budget pool is exhausted in any one year, employees and the Union will be notified that no further applications will be accepted or approved until fund renewal in the following year.

6.5 The University commits to maintain funding for the Professional and Skills Development program at the current established amount of \$100,000 per contract year until such time as the parties agree to amend the funding levels. Funds not expended in any fiscal year shall be carried forward to the next fiscal year.

6.6 Employees will not be able to accrue individual funding amounts from year to year, nor can they borrow against future years.