

**UBC OKANAGAN & BCGEU SUPPORT STAFF
PROFESSIONAL DEVELOPMENT FUND
TERMS OF REFERENCE**

In accordance with Article 56 – 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 UBC O 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 UBC O for an unspecified term.

All Committee members are eligible for re-appointment.

2. Eligibility for Professional Development Funding

BCGEU employees (excluding employees on leave without pay) with a regular full-time, part-time or sessional appointment and with six months of accumulated service (or 910 accumulated hours) and auxiliary staff with one year accumulated service (1820 hours) are eligible employees.

Employees approved for Professional Development Leave are entitled to up to 20 paid working days, pursuant to Article 56.5 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's work 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 job 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 57 of the collective agreement.

5. Administrative Guidelines

Eligible employees can access funds for approved professional development to a maximum of \$1200.00 per fiscal year (April 1 to March 31) for regular employees and \$600 for auxiliary employees with one year accumulated service. Maximum funding levels are set by the Committee and reviewed periodically.

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 **two weeks** of the staff development activity.

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. Application and Approval Process

- i. Completed applications are to be submitted to Human Resources five (5) business days prior to the next scheduled Committee meeting. The Committee meets monthly; dates will be posted on the HR website:
http://www.ubc.ca/okanagan/hr/learning/profdev/bcgeu_pd.html
- ii. Completed applications are considered on a first come first served basis. Applications must include a completed form along with back-up information about the event/activity, a letter to support the funding request and travel costs.
- iii. Only complete applications will be forwarded to the Committee for review. Incomplete applications will be returned to the applicant.
- iv. Eligible employees can apply up to four months in advance of an event; financial support may be pre-approved, contingent on availability of funds.
- v. The Committee does not normally approve funding requests retroactively.
- vi. Requests for leave to participate in a professional activity must be made by the applicant and approved by his/her direct supervisor who then signs accordingly on the application form.

- vii. Support Staff Development Fund Applications are available on-line at http://www.ubc.ca/okanagan/hr/learning/profdevl/bcgeu_pd.html

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.