

Management and Professional Staff (M&P) Professional Development Fund Guidelines

1. Purpose of the Program

The University and the Association of Administrative and Professional Staff (AAPS) recognize the value of a Management and Professional (M&P) group that is fully engaged, current in their field of expertise, curious to learn, and committed to sharing and applying their knowledge within the UBC community.

Therefore, the University and AAPS established a funded program to support individual professional development under a Letter of Agreement signed in 2006.

For the purposes of this program, Professional Development is defined as those learning activities that enhance the knowledge, performance, or career progression of an employee's work at the University.

2. Eligibility & Administrative Guidelines

- 2.1. Expenses must be related to professional development that enhances the knowledge, performance, or career progression of an employee's work at the University.
- 2.2. Employees will be eligible to participate and access funding up to a maximum of **\$550** per year* (*UBC Fiscal Year: April 1 – March 31). Note: access will be on a first come, first serve basis. If overall funding is exhausted in any one year, employees and AAPS will be notified that no further applications will be approved until fund renewal in the following year (April 1).
- 2.3. The funding limits above will be pro-rated for employees working less than 50%.
- 2.4. Staff Finder employees will be expected to attend training beyond working hours unless the department where they are currently working agrees to sponsor their wages (as assessed by Staff Finders).
- 2.5. Employees on maternity or parental leave are eligible for funding. Employees on personal leave may or may not be eligible, depending on the nature of the leave and on the understanding that the employees are intending to return to the University.
- 2.6. Employees who leave the organization on a voluntarily or involuntarily basis, are eligible up to the date of notice.
- 2.7. Employees will not be able to accrue funds from year to year, nor can they borrow against future years.

2.8. **Eligible expenses** under the program may include fees related to pursuing a variety of learning opportunities and/or methodologies such as academic degrees, professional diplomas & certificates programs, individual courses, workshops, conferences, seminars, professional membership fees, books, professional journals, web-based learning, one-to-one coaching and structured experiential learning. As well as reasonable travel and associated expenses related to conferences, workshops and seminars attended out-of-town (as per [UBC travel policy 83](#))

2.8.1. UBC undergraduate or graduate degree programs and UBC Continuing Studies courses/certificates programs taken for professional development purposes are eligible expenses for reimbursement. Whenever feasible, staff members should access the [Tuition Fee Waiver](#) for UBC courses / programs **prior to seeking top-up** reimbursement from the M&P PD Fund.

2.8.2. The Professional Development fund generally does not cover recreational courses or courses related to personal development unless there is an explicit component of the course which develops other skills related to professional development (e.g. leadership). Such courses will be evaluated on a case by case basis.

2.8.3. **Ineligible expenses** include but are not limited to:

- Academic student fees
- Most software applications (except tutorial based software)
- Electronic devices (such as laptops, e-readers, tablets)
- Internet access fees for computers or mobile devices
- Personal travel expenses or *local* (Greater Vancouver area) travel expenses related to conferences, workshops or courses. (For instance, if your place of residence is in Vancouver and your conference is in Burnaby, then travel expenses will not be eligible for reimbursement.)
- Stationery and other related office supplies.
- Subscriptions for communicative devices (i.e. cell phones, PDAs, etc.)
- Registered mail, courier services, shipping and handling fees.

2.9. This program is not intended to substitute for funds currently spent on the development of M&P staff members at the department level.

2.10. Departments are responsible for providing job-related skill development required for, or integral to, the effective functioning of a position.

- 2.11. The operational requirements of the sponsoring department need to be recognized when preparing an application. Any dispute regarding entitlement shall be resolved by the applicant's Department Head or Designate.

3. Program Administration

- 3.1. The fund will be centrally administered by Organizational Development and Learning (ODL), Human Resources.

- 3.2. To ensure accessibility:

- 3.2.1. Applications for the Professional Development Fund will be provided on the Organizational Development & Learning, Human Resources website: <http://www.hr.ubc.ca/odl/funding>

- 3.2.2. In addition, the Professional Development Fund will be highlighted during the University-wide Orientation, and in the Benefits Information section of the Human Resources website.

- 3.2.3. Updates on administration of the program will be provided on a regular basis to the University and AAPS Executive.

- 3.2.4. It is understood that applications will not be made for funds that have already been reimbursed by other means.

4. Procedures

Applications should be completed according to the instructions accompanying the application form. The application can be mailed or hand delivered. **Fax copies are not accepted.**

- 4.1. Individuals submitting applications should allow up to three weeks for Human Resources to process the application and give notice of authorization & reimbursement.

- 4.2. Individuals wishing to register for a HR UBC [MOST workshop](#) do not have to pay upfront or submit original receipts. Instead, submit a completed PD application form at least two weeks prior to the date of the workshop. Upon approval, payment will be forwarded to the MOST Administrator on your behalf.

- 4.3. Funds will be reimbursed subsequent to the submission of original receipts. All receipts must accompany completed application forms.

4.4. Applications must be made by individuals and not by their department. Individuals who have had upfront PD expenses covered by their department may request that a direct Journal Voucher reimbursement be made to their department.

4.5. To ensure fairness in the distribution and apportioning of funds, the following will apply:

4.5.1. **'Year' refers to the period April 1 – March 31.**

4.5.2. **Completed applications must be submitted to Human Resources within 60 days of the original PD expense purchase date (as shown on receipt).** Applications are eligible for submission as soon as upfront payment has been made and must include receipts & any supplemental documentation required as described on the application form. Please note that after 60 days from the original date of purchase, PD expenses will no longer be eligible for M&P funding support.

4.5.3. A funding ceiling of a maximum of **\$550** an employee, per year, subject to availability of funds.

4.5.4. The funding ceiling will be reviewed annually based on the previous year's distribution of funds.

4.5.5. Applications may be approved in accordance with the Eligibility and Administrative Guidelines. (Section 2.)

4.5.6. Funds remaining in the Professional Development Fund at the end of a funding year will be carried forward into the next funding year. Approved funding for individual professional development activities will **not** be carried forward into the next funding year. Additionally, unused individual balances will **not** be carried forward into the next funding year

4.5.7. Courses eligible under the Professional Development Fund are a non-taxable benefit. To comply with Revenue Canada's legislation, official tax receipts received for course fees/tuition cannot be used for income tax purposes.

4.5.8. Organizational Development & Learning does not grant leave. An employee must arrange leave time with his or her department head/manager when a professional development course/activity occurs during normal working hours. As a general guiding principle, when a learning activity is of mutual benefit to both employee and department, time off can be granted with pay at the discretion of the departmental supervisor.