

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. Employees may view their personal eligibility status, claim history and available balance online through the Faculty & Staff Self-Service portal - <http://msp.ubc.ca>. Once logged in, this information is available to view under the high level "staff PD" tab or by navigating through the "HRMS Self Service" tab to myPD and Learning -> myPD Funds (staff / RA only).
- 2.5. Hiring Solutions employees will be expected to attend training beyond working for hours unless the department where they are currently working agrees to sponsor their wages (as assessed by Hiring Solutions).
- 2.6. Employees on maternity or parental leave are eligible to access funding. UBC Human Resources will review the eligibility of staff on all other types of leaves on a case-by-case basis.

2.7. Staff who are ending employment with the University – either voluntarily or involuntarily – are not eligible to access funding once they have given notice of resignation or received a notice of termination. *Exception:* Staff on working notice are eligible for funding during the period of working notice. These individuals must meet the normal requirements set out by the University and the professional development activity (if eligible) must occur during the working notice period.

2.8. Employees will not be able to accrue funds from year to year, nor can they borrow against future years.

2.9. **Eligible expenses** under the program may include fees related to pursuing a variety of learning opportunities such as academic degrees, professional diploma & certificate programs, individual courses, workshops, conferences, seminars, professional memberships, resource 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](#)).

2.9.1. UBC undergraduate or graduate degree programs and UBC Extended Learning courses/certificates programs taken for professional development purposes are eligible expenses for reimbursement. However, when feasible, staff members should access their [Tuition Fee Waiver](#) first to cover UBC courses / programs tuition costs **prior to seeking top-up** funding from the M&P PD Fund.

2.9.2. 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.

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

- Academic student fees
- Professional memberships and designations *required* to be maintained for current job.
- Software applications
- Electronic devices (such as home computers, laptops, e-readers, tablets, mobile phones)
- Internet, phone or data plans for home computers or mobile communication devices.
- Local travel or meal expenses related to attendance at conferences, courses and similar events within Metro Vancouver. 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.
- Office supplies or equipment
- Registered mail or courier services

2.10. This program is not intended to substitute for funds currently spent on the development of M&P staff members at the department level, including team based PD activities initiated within a unit.

- 2.11. Departments are responsible for covering the cost of job-related skill development and training required for, or integral to, the effective functioning of a position.
- 2.12. 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 Workplace Learning and Engagement (WLE), Human Resources.
- 3.2. To ensure accessibility:
 - 3.2.1. Applications for the Professional Development Fund will be provided on the Human Resources website: <http://hr.ubc.ca/pd-funds/>
 - 3.2.2. In addition, the Professional Development Fund will be highlighted during UBC Orientation and Onboarding events 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 described on the PD claim form available on the [HR website](#). The application can be mailed or hand delivered. **Emailed or faxed 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 [professional development workshops](#) offered through UBC Human Resources do not have to pay the registration fee out of pocket. Instead, at the time of online registration, please follow the instructions provided to authorize Human Resources to arrange direct payment of your registration fee from your available PD Fund balance.

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. Overall funds remaining in the M&P Professional Development Fund at the end of a funding year will be carried forward into the next funding year, if applicable. Approved funding for individual professional development activities will ***not*** be carried forward into the next funding year. Additionally, unused individual balances expire at year-end will ***not*** be carried forward into the next funding year.

4.5.7. 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.

4.5.8. If a selected activity occurs during regularly scheduled working hours, a staff member must receive manager approval for time off before committing to attend the PD activity. Time off work to attend an activity may be granted with pay or another mutually agreeable arrangement at the manager's discretion.