



Professional and Skills Development Fund Guidelines IUOE 115 Employee Group

1. Purpose of the Program

The University and the International Union of Operating Engineers (IUOE) Local 115 support the principle of ongoing professional and skill development of employees that is in line with career opportunities for advancement in the service of the University.

In recognition of this principle, the University and IUOE Local 115 established a funding program to support individual professional and skill development under the Letter of Understanding # 9 in October 2019.

For the purposes of this funding program, professional and skill development is defined as those learning activities that will enhance the knowledge, skills, performance, or career progression of an employee's work at the University.

2. Employee Eligibility Criteria

- 2.1 Employees in the IUOE 115 employee group, are eligible to access this professional development funding program. Funding is non-transferable.
- 2.2. Employees on maternity or parental leave are eligible for funding. Employees on all other types of temporary leaves will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.
- 2.3. Employees temporarily assigned to work outside of the IUOE 115 bargaining unit will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.
- 2.4. Employees who will be ending employment with the University on a voluntarily or involuntarily basis are ineligible once notice has been served.

3. Funding Amount Criteria

- 3.1. Employees will be eligible to access funding up to a maximum amount of **\$1,000** 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. The **maximum amount noted above will be pro-rated** for employees working in positions that are less than a 50% FTE (typically staff working less than 18 hours per week on average).
- 3.3. Employees may check their current eligibility status and available funding amount online through the [Faculty/ Staff Self Service Portal](#) by clicking the “staff PD” tab. Online [self-service help](#) is available. General information and claim forms for the IUOE 115 PD Fund can be found on the UBE HR website <https://www.hr.ubc.ca/learning-engagement/pd-funding/>.

4. Professional & Skills Development Eligibility Criteria

- 4.1. This funding program supports employees to access learning activities that will enhance current job related knowledge, skills and performance as well as to pursue development activities that will be of future use to their career at UBC.
 - 4.1.1. **Typical eligible expenses include:**
 - a) Course tuition plus related textbook purchases that are part of a diploma, certificate or degree program offered at a private or public educational institution.
 - b) Professional development workshops offered by [UBC Human Resources](#)
 - c) Registration & materials for individual courses, workshops, seminars or conferences
 - d) Exam fees
 - e) Professional memberships and licensing dues (only when not required by current job)
 - f) Resource books and online subscriptions 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 Policy [FM8](#) and other related [UBC business expense documents](#).
 - i) UBC undergraduate or graduate courses/programs tuition, UBC Extended Learning and Sauder Continuing Business Studies courses/programs fees, when taken for professional

development purposes. Employees are expected to exhaust their UBC [Tuition Fee Waiver](#) Benefit first before applying to this funding program to offset any remaining balance.

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

- a) Required training to meet job requirements in an employee's current job
- b) Professional memberships and licensing dues required by current job
- c) Activities taken for health and wellness, general interest, or recreational purposes
- d) Ancillary student fees associated with credit courses or programs
- e) Local travel expenses such as meals, transportation or parking within Metro Vancouver
- f) Shipping and handling fees for online book orders, courier or mail services
- g) Software applications (such as Adobe Creative Suite or MS Office)
- h) All electronic devices and any associated data plans (laptops, e-readers, tablets, cell phones)

4.3. 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.

4.4. 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. Procedures

5.1. This funding program operates on a reimbursement basis. The initial upfront payment is made by an employee using personal funds or by a department method using university funds. Approved reimbursements from this PD Fund will then be made directly to the employee through direct bank deposit or to a department through a journal voucher transfer, depending on who initiated the upfront payment.

5.2. 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. Time off work to attend a PD activity may be granted with pay or another mutually agreeable arrangement at the discretion of the manager. Operational requirements need to be recognized, and in some situations, a department may request that the activity be postponed to a time that is mutually convenient to employee and department.

- 5.2.1. In cases where an employee's chosen activity is a relevant [professional development workshop](#) offered by UBC Human Resources, Workplace Learning Ecosystem, time to attend during regular work hours should be granted with pay.
- 5.2.2. UBC Hiring Solutions employees (when placed in an IUOE 115 position) will be expected to attend PD activities outside of work hours unless the department where they are currently working agrees to sponsor their wages (as assessed by Hiring Solutions).
- 5.3. Application forms should be completed according to the instructions provided on the form and require the inclusion of receipts **and** additional back-up documentation as noted on the form. (submit original receipts for employee reimbursement or photocopied receipts for department reimbursement).
- 5.4. Completed applications must be submitted to UBC Human Resources **within 60 days** of the PD activity purchase date (as shown on receipt) to be considered eligible for funding. The application is eligible for submission as soon as a purchase has been made and can be before the activity start date.
- 5.5. Authorization of applications to the PD Fund should be provided by an employee's direct manager. The authorizing managers must be in M&P, Faculty or SUD level position.
- 5.6. Applications to the PD Fund must be made by an individual employee and not by a department proxy. A department may not request reimbursement from the PD Fund without an employee's knowledge or prior consent.
- 5.7. Individuals submitting applications should allow up to three weeks for Human Resources to confirm eligibility, give notice of authorization by email and process the reimbursement.
- 5.8. Employees can check personal eligibility, annual funding amounts and the status of a submitted claim online through the [Faculty and Staff Self Service Portal](#) by clicking the "Staff PD" tab .
- 5.9. Applications will not be made for expenses that have already been reimbursed by other means.
- 5.10. In the event of a cancellation of an approved and processed PD application, it is an employee's responsibility to contact UBC Human Resources and repay UBC for any funds received.

- 5.11. 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.
- 6.2. The University will meet with the IUOE115 Union on a semi-annual basis to review the usage, uptake and funding status of the IUOE 115 Professional and Skills Development Fund and to consider potential changes as required.

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 IUOE 115 Union will be notified that no further applications will be accepted or approved until fund renewal in the following year.
- 6.5. The individual funding limit amount will be reviewed annually by the University in consultation with the IUOE 115 Union and is subject to change based on an assessment of the previous year's distribution of funds.
- 6.6. Employees will not be able to accrue unused individual funding amounts from year to year, nor can they borrow against future years. However, any overall budgeted funds remaining in the Fund at the end of the year will be carried forward into the next funding year.
- 6.7. Application forms and general information on the IUOE 115 Professional & Skills Development Fund will be provided on the Human Resources website and highlighted during the University-Wide Orientation and other outreach activities at UBC.