

**Professional Development Fund for  
for CUPE 2950 Employees  
Guidelines**

***(also known as the Job Skills Training Program – JSTP)***

UBC Human Resources  
Workplace Learning and Engagement  
Updated April 2021

# Professional Development Fund for CUPE 2950 Staff Guidelines

## 1. Purpose of the Program

UBC is committed to the professional development of its CUPE 2950 staff members recognizing that ongoing learning is one of the cornerstones of an engaged workforce.

To operationalize this commitment, the current Collective Agreement between the University and CUPE Local 2950 states:

**“The University will maintain a professional development fund at the current funding level to support learning activities that will enhance an employee’s current job performance as well as support skill development to assist in opportunities for transfer and promotion throughout the University.**

This is not intended to relieve the employer’s obligations under Article 20.

Priority consideration is given to employees who are on recall in accordance with Article 34.04 (c)(iii). “

*{CUPE 2950 Collective Agreement page 20 April 1, 2019 to March 31, 2022}*

## 2. Program Scope

**Within the context of the program purpose noted above**, the CUPE 2950 PD Fund supports learning activities that will:

- 2.1. assist with skill development for relocation of employees under notice of layoff
- 2.2. upgrade skills and knowledge related to technological advances
- 2.3. provide employees with opportunities for advancement and promotion within the University
- 2.4. support employee growth and development
- 2.5. help employees build a portfolio of transferable skills for current and future roles at the University

## 3. Underlying Principles

- 3.1. Priority will be given to applications in the order established in Program Scope above.
- 3.2. The CUPE 2950 PD Fund is designed to provide developmental opportunities for CUPE 2950 members and funding is non-transferable to a member’s partner or dependents.
- 3.3. Every effort will be made to notify CUPE 2950 employees of the availability of the program and the process for applying for funds.
- 3.4. In administering the program, special attention is paid to ensuring fairness and accessibility.

#### 4. Employee Eligibility

4.1. Employees in the CUPE 2950 employee group will be eligible to participate and access funding up to a maximum of **\$1,400** per year\* (\*UBC Fiscal Year: April 1 – March 31). Part time employees with a staff appointment of less than .50 FTE are eligible for funding on a pro-rated basis.

Note: access will be on a first come, first serve basis. If overall funding is exhausted in any one year, employees and the CUPE 2950 union will be notified that no further applications will be approved until fund renewal in the following year (April 1).

4.2. 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 "Expenses". On the next screen, click on "Reimbursable Allowance Plan Activity" to view.

4.3. Employees are eligible to apply funding while on maternity, adoption or parental leave. Employees requesting funding associated with other leave types will have their applications reviewed by Human Resources on a case by case basis.

4.4. Employees temporarily assigned to work outside of the CUPE 2950 bargaining unit will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.

4.5. Employees who will be ending employment with the University on a voluntarily or involuntarily basis are ineligible once notice has been served. Exception: Employees on notice of layoff or on recall will maintain eligibility.

## 5. Eligible Expenses

### 5.1. 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 fees & material costs 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 subscription 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) 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.

### 5.2. 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) 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).
- i) All work equipment and supplies

5.3. Departments are responsible for providing skills training required for, or integral to, the effective functioning of a position. These types of expenses should be paid for at the department/unit level and should not be charged to the CUPE 2950 PD Fund.

5.4. The program is not expected to substitute for third-party training funding, (e.g. WCB, ICBC, Disability Insurance).

## 6. Procedures

- 6.1. An employee must arrange leave time with his or her manager when a learning activity occurs during normal working hours. As a general guiding principle, when a learning activity is of mutual benefit to both employee and the department, time off can be granted with pay at the discretion of the manager.
- 6.2. The operational requirements of the sponsoring department need to be recognized when preparing and authorizing applications. A Department may request that training be postponed to a time that is mutually convenient to employee and department.
- 6.3. UBC Hiring Solutions employees will be expected to attend training beyond work hours unless the department where they are currently working agrees to sponsor their wages (as assessed by Hiring Solutions).
- 6.4. 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 for “How do I claim out of pocket or credit card expenses against PD Funds?” or “How do I transfer PD Funds reimbursement to my department?”)
- 6.4.1. **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.
- 6.4.2. **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.
- 6.4.3. **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 (not claimant’s UBC VISA card), or Internal Service Delivery transaction. The Workday request type is called “ PD Fund Claim – Reimburse My Department “. Receipts and copy of general ledger entry must be included.

- 6.5. Individuals submitting PD Fund expense reports (claims) should allow up to three weeks for the approval workflow to be completed and for Human Resources to process the reimbursement through Workday.
- 6.6. 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.

## 7. Program Administration

- 7.1. Priority funding will be provided to employees on recall or those with impending layoffs.
- 7.2. To ensure fairness in the distribution and apportioning of funds, the following will apply:
  - 7.2.1. 'Year' refers to the UBC fiscal period **April 1<sup>st</sup> -March 31<sup>st</sup>**.
- 7.3. PD Fund claims, including receipts, must be submitted online through Workday **within 60 days** of the original purchase date (as shown on receipt) to qualify for funding. After 60 days a receipt is no longer eligible to submit for reimbursement. Please note that a PD Fund claim may be submitted as soon as purchase has been made and can be before the activity start date
  - 7.3.1.1. Employees in the CUPE 2950 employee group will be eligible to participate and access funding up to a maximum of **\$1,400** per year\* (\*April 1 – March 31). Part time employees with a staff appointment of less than .50 FTE are eligible for funding on a pro-rated basis.
  - 7.3.2. Applications (not to exceed five consecutive days of training on work time) may be approved in accordance with 4.5.3. Further applications may be approved up to the funding ceiling if an employee wishes to attend additional courses outside work hours.
  - 7.3.3. Funds not spent by an individual in a fiscal year will not be rolled over into the following year.
  - 7.3.4. In consultation with the appropriate HR advisor, the funding ceiling for employees on layoff notice or recall will be determined on a case by case basis.

7.4. To ensure accessibility:

- 7.4.1. Information on the CUPE 2950 PD Fund is provided on the UBC Human Resources website: <https://hr.ubc.ca/career-development/professional-development-funding/staff-professional-development-funding>
- 7.4.2. The CUPE 2950 PD Fund is highlighted during the University-wide Orientation, and on the Human Resources website.
- 7.4.3. Updates on administration of the program are provided on a regular basis to the University and CUPE Local 2950 Executive Committee.

7.5. 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.

7.6. The CUPE 2950 PD Fund will be reviewed on an ongoing basis to ensure that the program is meeting the evolving professional development needs of UBC's CUPE 2950 staff members