

Executive Administrative Professional Development (EA PD) Fund Guidelines

1. Eligibility & Administrative Guidelines

- 1.1. Expenses must be related to professional development that enhances the applicant's knowledge, performance, or career progression at the University.
- 1.2. Employees in the Executive Administrative employee group will be eligible to participate and access funding up to a maximum of **\$1,500 per UBC fiscal** year. April 1 through March 31.

Note: access will be on a first come, first serve basis. If funding is exhausted in any one year, employees will be notified that no further applications will be approved until fund renewal in the following year.
- 1.3. The funding limits above will be pro-rated for part-time employees with less than a .50 FTE position.
- 1.4. UBC Hiring Solutions employees assigned to executive administrative temporary positions are eligible to apply for funding; however, these 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)
- 1.5. Employees on maternity, parental or adoption leave are eligible for funding; Employees on all other types of leave from UBC will have their funding request evaluated on a case by case basis.
- 1.6. Employees temporarily assigned to work outside of the executive administrative employee group will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.
- 1.7. Employees will not be able to accrue funds from year to year, nor can they borrow against future years.
- 1.8. Employees who will be ending employment with the University on a voluntarily or involuntarily basis are ineligible once notice has been served

1.9. 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.

1.10. 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

1.11. Departments are responsible for providing funding for job-related skill development 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 EA PD Fund.

1.12. The operational requirements of the sponsoring department need to be recognized when preparing an application. A Department may request that training be postponed to a time that is mutually convenient to employee and department.

2. Program Administration

- 2.1. The fund will be centrally administered by Workplace Learning and Engagement, Human Resources.
- 2.2. To ensure accessibility:
 - 2.2.1. Information on the EA PD Fund will be provided on the Human Resources website <https://hr.ubc.ca/career-development/professional-development-funding/staff-professional-development-funding>
 - 2.2.2. In addition, the EA PD Fund will be highlighted during the University-wide Orientation.
 - 2.2.3. Updates on administration of the program will be provided on a regular basis to the University.
 - 2.2.4. It is understood that applications will not be made for funds that have already been reimbursed by other means.

3. Procedures

- 3.1. 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?”).
 - 3.1.1. **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
 - 3.1.2. **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.

3.1.3. **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 the general ledger entry must be included.

3.2. Authorization of PD Fund claims must be provided by an employee's direct manager through Workday online workflow. The authorizing managers must be in M&P, Faculty or SUD level position.

3.3. 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.

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

3.4.1. 'Year' refers to the period April 01-March 31.

3.4.2. A funding ceiling of a maximum of **\$1,500** an employee, per fiscal year, subject to availability of funds.

3.4.3. PD Fund claims, with receipts included, must be submitted online through Workday **within 60 days** of the original purchase date (as shown on the 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 a purchase has been made and can be before the activity start date.

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

- 3.4.5. Applications may be approved in accordance with the Eligibility and Administrative Guidelines. (Section 1.)
- 3.4.6. Overall Funds remaining in the EA PD Fund at the end of a funding year will be carried forward into the next funding year. However, unused individual balances will *not* be carried forward into the next funding year.
- 3.4.7. An employee must arrange leave time with his or her manager when a professional development 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.
- 3.4.8. Courses eligible under the EA PD 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. Please refer to the [Canadian Revenue Agency – Eligible Tuition Fees](#) webpage for more information.
- 3.4.9. 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.