

## **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 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.
- 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 diplomas & certificate programs,
- individual courses, workshops, seminars, exams
- professional memberships that are not required for your current job
- resource books, professional journals,
- one-to-one coaching when provided by an [ICF](#) – credentialed coach
- conferences
- reasonable travel and associated expenses related to conferences, workshops and seminars attended out-of-town (as per [UBC travel expenditure guidelines](#))

2.9.1. UBC undergraduate or graduate degree programs, UBC Extended Learning and Sauder Continuing Business Studies 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. Information on the Professional Development Fund will be provided on the Human Resources website: <https://hr.ubc.ca/career-development/professional-development-funding/staff-professional-development-funding>
  - 3.2.2. In addition, the Professional Development Fund will be highlighted during UBC Orientation and Onboarding events.
  - 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

- 4.1. Employees submit PD fund claims 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, you 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?").

- 4.1.1. **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.
- 4.1.2. **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.
- 4.1.3. **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.
- 4.2. Individuals submitting PD Fund expense reports (claims) should allow up to three weeks for the online approval workflow to be completed and for Human Resources to process the reimbursement through Workday.
- 4.3. All receipts and any other supporting documentation must accompany completed PD Fund expense reports or PD request questionnaire forms.
- 4.4. To ensure fairness in the distribution and apportioning of funds, the following will apply:
- 4.4.1. **‘Year’ refers to the period April 1 – March 31.**
- 4.4.2. 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.
- 4.4.3.A funding ceiling of a maximum of **\$550** an employee, per year, subject to availability of funds.
- 4.4.4.The funding ceiling will be reviewed annually based on the previous year’s distribution of funds.
- 4.4.5.Applications may be approved in accordance with the Eligibility and Administrative Guidelines.  
(Section 2.)

- 4.4.6. 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. However, individual balances expire at year-end will ***not*** be carried forward into the next funding year.
- 4.4.7. 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.
- 4.4.8. 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.