

Non-Union Technicians & Research Assistants (TRA) Professional Development Fund Guidelines

1. Purpose of the Program

The University recognizes the value of a Non-Union Technician/Research Assistant employee 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, in 2006, the University established a funded program to support individual professional development.

For the purposes of this program, Professional Development (PD) 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 activities that will enhance knowledge, skills, performance, or career progression of an employee's work at the University. Funding is non-transferable.

2.2. Staff belonging to the Non-Union Technician and Research Assistant employee group are eligible to participate and access funding up to a maximum of **\$800** per UBC fiscal year (April 1 – March 31) subject to the availability of the budgeted funding pool in any given year.

The funding limits above will be pro-rated for employees working less than 50% Full Time

Note: The TRA PD Fund is an annual pool of money distributed to staff on a first-come, first-serve basis. If the funding pool is exhausted in any one year, employees will be notified that no further applications will be accepted or processed until the fund renewal in the following year.

2.3. Completed applications must be submitted to Human Resources within **60 days of the original 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 PD expense claim form.

- 2.4. Employees on maternity, parental or adoption leave are eligible for funding; however, employees on all other types of leaves will have their applications reviewed on a case by case basis.
- 2.5. Employees in temporary promotion terms into other employee groups of 6 weeks or less are not eligible to apply for funding. These employees must wait until they have returned to their former position in order to apply for funding within the provisions of their own Non-Union TRA agreement.
- 2.6. Employees who will be ending employment with the University on a voluntary or involuntary basis are ineligible to access funds once notice has been served.
- 2.7. Employees will not be able to accrue funds from year to year, nor can they borrow against future years.
- 2.8. Typical **eligible** expenses include:
- Course tuition plus textbook purchases that are part of a diploma, certificate or degree program offered by a private or public educational institution.
 - Registration and materials for individual courses, workshops, or conferences.
 - Exam fees.
 - Professional memberships (eligible when of benefit but not required by current job)
 - Resource books and online subscriptions for self-directed study.
 - Coaching sessions provided by an [ICF certified](#) coach.
 - Travel expenses related to out-of-town conferences or other unique learning opportunities not available locally. Travel expenses are reimbursed as per [Policy FM8](#) (formerly Policy #83) and related [business expense documents](#).
 - UBC undergraduate or graduate degree programs and UBC Extended Learning / Sauder Continuing Business Studies courses or certificates. Employees are requested to exhaust their UBC [Tuition Fee Waiver](#) benefit first before applying to this PD Fund to cover additional out of pocket expenses.

2.8.1. Typical **ineligible** expenses include, but are not limited to:

- Required training to meet job requirements in an employee's current job.
- Professional memberships, certifications & licensing dues required by current job.
- Activities taken for health and wellness, general interest, or recreational purposes.
- Local travel expenses such as transit, parking or meals within Metro Vancouver.
- Ancillary student fees associated with credit courses or programs.
- All electronic devices & data plans (such as laptop, tablet, smartphone & plan),
- Software applications (such as Adobe Creative Suite or MS Office)

- 2.9. 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, as vacation time, or as another mutually agreeable arrangement, at the discretion of the manager. Operational requirements of the sponsoring department 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.
- 2.10. 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 budgeted departmental funds (where available) as a way to increase and enhance employee access to professional development and career growth opportunities.
- 2.11. Departments are responsible for providing employees with job required training and maintaining job required professional memberships, certifications, or licensing. The costs associated with these required operational responsibilities are not eligible for reimbursement through this professional development fund.

3. Program Administration

- 3.1. The fund is centrally administered by Workplace Learning and Engagement, Human Resources. The funding provided to employees comes from a UBC central budget, and is not charged back to a claimant's unit/department or research grant.
- 3.2. To ensure accessibility:
- 3.2.1. Applications for the Professional Development Fund will be provided on the Human Resources website: <http://www.hr.ubc.ca/learning-development/funding/tra/>
- 3.2.2. In addition, the Professional Development Fund will be highlighted during the University-wide Orientation, 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.

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. Applications should be completed according to the instructions outlined on the PD expense claim form and must include original receipts and other back-up documentation as noted on the form. The claim form can be mailed or hand delivered (emailed copies are not accepted).
- 4.2. Authorization of applications should be provided by an applicant's direct supervisor (authorizing managers must be in M&P, Faculty, or Service Unit Director level positions).
- 4.3. Individuals who register for a [professional development workshop](http://www.hr.ubc.ca/learning-engagement/leading-learning/professional-development-workshops/registration-guidelines/) offered by UBC Human Resources do not have to pay the registration fee out of pocket. Instead, staff should follow the registration and PD fund payment instructions provided on the HR website <http://www.hr.ubc.ca/learning-engagement/leading-learning/professional-development-workshops/registration-guidelines/>.
- 4.4. Individuals submitting applications should allow up to two weeks for Human Resources to process the application and give notice of reimbursement.
- 4.5. Applications to the PD Fund must be made by an individual staff member and not by a department proxy. A PD Fund related reimbursement to a department speedchart is possible if the upfront payment was initially made by the department. However, the claim cannot be made without an employee's knowledge or consent.
- 4.6. To ensure fairness in the distribution and apportioning of funds, the following will apply:
 - 4.6.1. **'Year' refers to the period April 01-March 31.**
 - 4.6.2. A funding ceiling of a maximum of **\$800** per employee, per year, subject to availability of the budgeted funding pool in any given year.
 - 4.6.3. The Professional Development Fund is an annual pool of money distributed to staff on a first-come, first-serve basis. If the funding pool is exhausted in any one year, employees will be notified that no further applications will be accepted or processed until the fund renewal in the following year (April 1 renewal date).

- 4.6.4. The \$800 maximum claim amount will be reviewed annually and may change based on the previous year's distribution of funds.
- 4.6.5. Applications may be approved in accordance with the Eligibility and Administrative Guidelines. (Section 2.)
- 4.6.6. Any overall funds remaining in the PD Fund at the end of a year will be carried forward into the next funding year. However, unused individual balances will *not* be carried forward into the next funding year.
- 4.7. The funding provided is considered a non-taxable benefit. Employee who receive a tax certificate from an educational institution for tuition reimbursed through this PD Fund should not claim the amount as a tuition credit on their annual tax return. Please refer to the Canadian Revenue Agency – [Eligible Tuition Fees](#) webpages for more information.
- 4.8. In the event of a cancellation or no show for a PD funded activity, it is the employee's responsibility to contact Human Resources and repay UBC for any funds received