

Executive Administrative Professional Development (EAPD) 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 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 and will be allocated on a proportional basis between UBC Vancouver and UBC Okanagan. 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 in M&P positions for a temporary term of 6 weeks or less are not eligible to apply for funding. These employees must wait until they have returned to their former executive administrative position in order to apply for funding.
- 1.7. Employees will not be able to accrue funds from year to year, nor can they borrow against future years.

- 1.8. Eligible expenses under the program may include a variety of learning opportunities and/or methodologies such as courses, workshops, conferences, exams, web-based learning, one-to-one coaching, certifications, diplomas, academic degrees, professional programs, structured experiential learning as well as reasonable travel expenses related to approved learning activities. The cost of resource books, professional memberships, course materials and some administrative fees are also eligible for funding. Please note that travel expenses are considered for courses that are not available locally and will be reimbursed in accordance with [UBC Travel Policy #83](#).
- 1.9. UBC undergraduate or graduate degree programs and UBC Continuing Studies courses/certificates programs taken for professional development purposes are eligible expenses for reimbursement. Whenever feasible, we ask that staff members use their [Tuition Fee Waiver](#) for UBC courses / programs **prior to seeking top-up** reimbursement from the Exec Admin PD Fund .
- 1.10. **Ineligible expenses** include but are not limited to:
- Most software applications (except tutorial based software)
 - Electronic devices (such as laptops, e-readers, tablets)
 - Internet access fees for computers or mobile devices
 - Personal travel expenses or *local* (Greater Vancouver area) travel expenses related to conferences, workshops or courses. (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.)
 - Subscriptions for communicative devices (i.e. cell phones, PDAs, etc.)
 - Registered mail and courier services
 - Academic student fees
- 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 EAPD.
- 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. Applications for the Professional Development Fund will be provided on the Human Resources website <http://www.hr.ubc.ca/learning-engagement/leading-learning/pd-funding/executive-administrative/>

2.2.2. In addition, the EAPD Fund will be highlighted during the University-wide Orientation, and in the Benefits Information section of the Human Resources website.

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. Applications should be completed according to the instructions accompanying the claim form. The claim form can be mailed or hand delivered to Human Resources, Vancouver campus.

3.2. Authorization of applications should be provided by an applicant's direct supervisor.

3.3. Individuals wishing to register for a UBC HR PD workshop do not have to prepay upfront or submit original receipts. Instead, email a completed application form at least two weeks prior to the date of the workshop. Upon approval, payment will be arranged on your behalf.

3.4. Individuals submitting applications should allow two weeks for Human Resources to process the application and give notice of authorization and reimbursement status.

3.5. A completed PD Claim form and receipt / proof of purchase should be submitted to Human Resources at the same time.

- 3.6. Applications must be made by individuals and not by their department. Individuals who have already been reimbursed by their department may request that a JV payment transfer from Human Resources be made to their department.
- 3.7. To ensure fairness in the distribution and apportioning of funds, the following will apply:
- 3.7.1. 'Year' refers to the period April 01-March 31.
- 3.7.2. A funding ceiling of a maximum of **\$1,500** an employee, per fiscal year, subject to availability of funds.
- 3.7.3. PD expense receipts and any additional back up documentation must be submitted to Human Resources within **60 days of the original purchase date** (as shown on receipt). Please note that after 60 days from the original date of purchase, PD expenses will no longer be eligible for EAPD funding support
- 3.7.4. The funding ceiling will be reviewed annually based on the previous year's distribution of funds.
- 3.7.5. Applications may be approved in accordance with the Eligibility and Administrative Guidelines. (Section 1.)
- 3.7.6. Funds remaining in the EAPD Fund at the end of a funding year will be carried forward into the next funding year. Unused individual balances will *not* be carried forward into the next funding year.
- 3.7.7. 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.
- 3.7.8. Courses eligible under the EAPD 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.