



# Professional and Skills Development Fund Guidelines IUOE 115 Employee Group

## 1. Purpose of the Program

The University and the International Union of Operating Engineers (IUOE) Local 115 support the principle of ongoing professional and skill development of employees that is in line with career opportunities for advancement in the service of the University.

In recognition of this principle, the University and IUOE Local 115 established a funding program to support individual professional and skill development under the Letter of Understanding # 9 in October 2019.

For the purposes of this funding program, professional and skill development is defined as those learning activities that will enhance the knowledge, skills, performance, or career progression of an employee's work at the University.

## 2. Employee Eligibility Criteria

- 2.1 Employees in the IUOE 115 employee group, are eligible to access this [professional development funding program](#). Funding is non-transferable.
- 2.2. Employees on maternity or parental leave are eligible for funding. Employees on all other types of temporary leaves will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.
- 2.3. Employees temporarily assigned to work outside of the IUOE 115 bargaining unit will have their eligibility reviewed by UBC Human Resources on a case-by-case basis.
- 2.4. Employees who will be ending employment with the University on a voluntarily or involuntarily basis are ineligible once notice has been served.

### 3. Funding Amount Criteria

- 3.1. Employees will be eligible to access funding up to a maximum amount of **\$1,000** per UBC fiscal year (April 1 to March 31), on a first-come, first-served basis, subject to the availability of the overall budgeted funds each year.
- 3.2. The **maximum amount noted above will be pro-rated** for employees working in positions that are less than a 50% FTE (typically staff working less than 18 hours per week on average).
- 3.3. 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 "View all Apps" On the next screen, click on "Expenses" and then click on "Reimbursable Allowance Plan Activity" to view.

### 4. Professional & Skills Development Eligibility Criteria

- 4.1. This funding program supports employees to access learning activities that will enhance current job related knowledge, skills and performance as well as to pursue development activities that will be of future use to their career at UBC.

#### 4.1.1. **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 – [Workplace Learning Ecosystem](#).
- 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.

**4.2. 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.

4.3. 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 any budgeted departmental funds (where available) as a way to increase and enhance employee access to development opportunities.

4.4. Departments are responsible for providing employees with job required training, certification or licensing. The costs associated with these required activities are a departmental responsibility and are not eligible for reimbursement through this funding program,

## **5. Procedures**

5.1. 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 or another mutually agreeable arrangement at the discretion of the manager. Operational requirements 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.

- 5.1.1. In cases where an employee's chosen activity is a relevant [professional development workshop](#) offered by UBC Human Resources, Workplace Learning Ecosystem, time to attend during regular work hours should be granted with pay.
- 5.1.2. UBC Hiring Solutions employees (when placed in an IUOE 115 position) will be expected to attend PD activities outside of work hours unless the department where they are currently working agrees to sponsor their wages (as assessed by Hiring Solutions).
- 5.2. 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 “Claim expenses against my PD Funds” or “Transfer PD Funds reimbursement to my department”).
- 5.2.1. 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.
- 5.2.2. 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.
- 5.2.3. 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.
- 5.3. PD Fund claims must be submitted online to UBC Human Resources through Workday **within 90 days** of the PD activity purchase date (as shown on receipt) to be considered eligible for funding, otherwise the claim will be declined. The application is eligible for submission as soon as a purchase has been made and can be before the activity start date.

- 5.4. 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.
- 5.5. 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.
- 5.6. 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.
- 5.7. 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.

## 6. Program Administration

- 6.1. The fund will be centrally administered by Talent Development and Engagement, Human Resources, UBC.
- 6.2. The University will meet with the IUOE115 Union on a semi-annual basis to review the usage, uptake and funding status of the IUOE 115 Professional and Skills Development Fund and to consider potential changes as required.

*To ensure accessibility and fairness in the distribution of yearly budgeted funds the following will apply:*

- 6.3. 'Year' refers to the period **April 1 to March 31 (The UBC Fiscal Year)**.
- 6.4. Access to overall annual budgeted funds is provided to eligible employees on a first-come, first-served basis. If the overall budget pool is exhausted in any one year, employees and the IUOE 115 Union will be notified that no further applications will be accepted or approved until fund renewal in the following year.
- 6.5. The individual funding limit amount will be reviewed annually by the University in consultation with the IUOE 115 Union and is subject to change based on an assessment of the previous year's distribution of funds.

- 6.6. Employees will not be able to accrue unused individual funding amounts from year to year, nor can they borrow against future years. However, any overall budgeted funds remaining in the Fund at the end of the year will be carried forward into the next funding year.
- 6.7. General information on the IUOE 115 Professional & Skills Development Fund will be provided on the Human Resources website and highlighted during the University-Wide Orientation and other outreach activities at UBC.