

**Professional Development Expenses
and Leave – Management Excluded Staff**

University Policy No.: HR6400
Classification: Human Resources
Approving Authority: President
Effective Date: July 2024
Supersedes: March 2014
Last Editorial Change:
Mandated Review: July 2031

Associated Procedures:

[Procedures for Claiming Professional Development Expenses – Management Excluded Staff](#)

[Professional Development Expenses: Guidelines for Management Excluded Staff](#)

Purpose

- 1.00 The purpose of this policy is to outline the eligibility and approval process for support for employees to engage in professional development activities.

Definitions

- 2.00 For the purposes of this policy, the following definitions apply:

“Eligible Expenses” are expenses eligible for reimbursement in accordance with the procedures and guidelines established for the administration of this policy. Expenses eligible for reimbursement are as follows:

- a) travel including accommodation, tuition, registration fees and other expenses for workshops, seminars, professional organizations and other similar activities;
- b) membership fees in learned societies and professional organizations; and expenses (e.g., books, journals, course materials, page charges, reprints, interlibrary loan charges) directly associated with professional development activities.

“Management Excluded” means union-excluded employees of the university covered by the Management Excluded Terms and Conditions of Employment.

“Professional Development” means those activities that enhance the knowledge, performance, or career progression of an employee’s work at the university and contribute to the successful achievement of the university’s mission.

“Professional Development Leave” means a leave of absence from scheduled work time to pursue professional development activities in accordance with the purpose of this Policy.

“Professional Development Expense Account” means the account established, for each eligible employee, by the university to track the deposit of the annual professional development allowance and withdrawals for Eligible Expenses. Funds in the Professional Development Expense Account are university funds and therefore subject to the eligibility requirements and procedures associated with this policy.

Scope

- 3.00 This policy applies to professional development expenses and leave of Management Excluded employees.

Policy

- 4.00 Effective July 1st of each year, continuing Management Excluded employees will receive a \$500 allowance in a Professional Development Expense Account for this purpose. Employees appointed to a term position for longer than 1 year are eligible to receive the allowance after their first year of service.

4.01 The university will temporarily suspend annual contributions to professional development expense accounts for individuals in receipt of long-term disability benefits or a long-term leave of absence, other than maternity and parental leave. Annual contributions will be recontinued in the year the individual on long-term leave returns to work.

- 5.00 Management Excluded employees may claim Eligible Expenses by following the steps in the Procedures.

Professional Development Leave

- 6.00 Professional Development Leave is encouraged and supported through the annual performance planning cycle.
- 7.00 Full or partial financial support for Professional Development Leave and expenses not fully covered by the above account is at the discretion of the university and subject to operational requirements and financial limitations and must be approved in advance of the professional development activity.
- 8.00 When deciding how to support individual professional development supervisors will also need to take into account factors such as the individual's time and nature of job; the department's need for training in a specific skill or content area; the relationship of the professional development activity to other colleagues; and the benefit of the professional development proposal to the university.
- 9.00 If an application for Professional Development Leave is received that requires an employee to be absent from the university for a period longer than 2 weeks, the supervisor of the employee applying for Professional Development Leave should consult with their Human Resources Consultant before giving final approval to ensure that practices are consistent where appropriate.

Authorities and Officers

- 10.00 The authorities and officers for this policy are:
- (i) Approving Authority: President
 - (ii) Designated Executive Officer: Vice-President Finance and Operations
 - (iii) Procedural Authority: Vice-President Finance and Operations
 - (iv) Procedural Officers: Associate Vice-President, Human Resources and Executive Director, Financial Services

Related Policies and Documents

[Records Management Policy \(IM7700\)](#)

[Information Security Policy \(IM7800\)](#)

[Travel and Business Expenses \(FM5610\)](#)

[Professional Development website](#)

[Canada Revenue Agency](#)

Procedures for Claiming Professional Development Expenses – Management Excluded Staff

Procedural Authority: Vice-President Finance and
Operations

Procedural Officers: Associate Vice-President Human
Resources and Executive Director, Financial Services

Effective Date: July 2024

Supersedes: March 2014

Last Editorial Change:

Parent Policy: [Professional Development Expenses and Leave - Management Excluded Staff \(HR6400\)](#)

Purpose

- 1.00 The purpose of this document is to set out procedures for administering the Professional Development Expense Account and procedures to be followed when Management Excluded employees are requesting approval for professional development expenses.

Definitions

- 2.00 The definitions contained within the [Professional Development Expenses and Leave – Management Excluded Staff Policy](#) apply to these procedures.

Procedures

- 3.00 Employees are required to review potential professional development expenses with their immediate supervisor prior to the purchase. The immediate supervisor shall assess whether the expense qualifies as an Eligible Expense in accordance with the Policy and Guidelines.
- 4.00 Requests for expenses that are not covered by the Guidelines must be pre-approved by the requesting employees' Vice-President and in consultation with the Associate Vice-President, Human Resources.
- 5.00 Pre-approved Eligible Expenses must be submitted to the immediate supervisor for approval before submission to Financial Services for payment. Reimbursement claims and commercial card reconciliation reports must be supported by original receipts or electronic images.
- 6.00 In circumstances where professional development funds were used for employment-related training and/or course fees, the Canada Revenue Agency advises that these amounts shouldn't be claimed on income taxes as a personal tuition credit or education amount. For more information, consult the CRA webpage.
- 7.00 Any unused balance in an employee's Professional Development Expense Account at end of the allocation year (July to June) will be automatically rolled ahead into that employee's Professional Development Expense Account for the succeeding fiscal year. Transactions for purchases using professional development funds made prior to retirement or termination will be accepted up to 60 days after termination.
- 8.00 Any unused balance in an employee's Professional Development Expense Account at the time of retirement or termination shall be reallocated by the university for other purposes.