

**Professional Development
Expenses and Leave: Professional
Employees' Association Staff**

University Policy No.: HR6420
Classification: Human Resources
Approving Authority: Board of Governors
Effective Date: July 2024
Supersedes: June 2021
Last Editorial Change:
Mandated Review: July 2031

Associated Procedures:

[Procedures for Claiming Professional Development Expense Account Expenses – Professional Employees' Association Staff](#)
[Procedures for Claiming Central Professional Development Fund Expenses – Professional Employees' Association 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 separate administration of the Professional Development Expense Account and the Central Fund. Expenses eligible for reimbursement, are as follows:

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

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

“Central Professional Development Fund” (the Central Fund) means the fund established by the university to which eligible employees may apply for funding assistance for specific professional development opportunities that cannot otherwise be funded.

Scope

- 3.00 This policy applies to PEA staff members holding a regular appointment and PEA staff members who have completed 1 continuous year of service, within the academic year, of a term appointment.

Policy

- 4.00 The university recognizes the value of a professional staff group that is fully engaged, current in their field of expertise, curious to learn, and committed to sharing and applying their knowledge within the UVic community. Therefore, the university has established a funded program to support individual professional development for the Professional Employees' Association (PEA) employee group.
- 5.00 Effective July 1st of each year, full-time continuing PEA employees will receive a \$250 entitlement in a Professional Development Expense Account (PDEA) 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.
- 6.00 Eligible PEA staff members who qualify for a PDEA may also apply to the Central Fund for professional development expense assistance. Employees must pass probation before applying.
- 7.00 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.
- 8.00 PEA employees may claim Eligible Expenses by following the steps in the Procedures and in conformity with the Guidelines.
- 8.01 The Vice-President Finance and Operations will approve the Guidelines, as developed and revised from time to time, in consultation with the Professional Employees' Association.

Professional Development Leave

- 9.00 Professional Development Leave is encouraged and supported through the annual performance planning cycle.
- 10.00 Full or partial financial support for Professional Development Leave and expenses not fully covered by the PDEA account is at the discretion of the university, subject to operational requirements and financial limitations and must be approved in advance of the professional development activity.
- 11.00 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.
- 12.00 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 will consult with

their Human Resources Consultant before giving final approval to ensure that practices are consistent where appropriate.

Authorities and Officers

- (i) Approving Authority: Board of Governors
- (ii) Designated Executive Officer: Vice-President Finance and Operations
- (iii) Procedural Authority: Vice-President Finance and Operations
- (iv) Procedural Officer: 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 for PEA Staff](#)

[Canada Revenue Agency](#)

Procedures for Claiming Professional Development Expense Account Expenses – Professional Employees' Association Staff

Procedural Authority: Vice-President Finance and
Operations

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

Effective Date: July 2024

Supersedes: 2015

Last Editorial Change:

Parent Policy: [Professional Development Expenses and Leave: Professional Employees' Association Staff \(HR6420\)](#)

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 eligible PEA staff members are requesting approval for eligible professional development expenses.

Definitions

- 2.00 The definitions contained within the [Professional Development Expenses and Leave – Professional Employees' Association 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 If a dispute arises concerning the eligibility of a claim, the staff member may request, in writing, that the Association/University Committee established under the PEA Collective Agreement conduct a review of the claim and the decision and, if appropriate, make a recommendation to the Vice President Finance and Operations, or designate. The VPFO's decision will not be subject to the grievance and arbitration procedures.
- 8.00 Any unused balance in an employee's Professional Development Expense Account at end of the allocation year (July to June) will be automatically carried forward to the succeeding year.

Transactions for purchases using professional development funds made prior to retirement or termination will be accepted up to 60 days after termination.

- 9.00 Any unused balance in an employee's Professional Development Expense Account at the time of retirement or termination shall be reallocated to the Central Professional Development Fund after the 60-day period after termination.

Procedures for Claiming Central Professional Development Fund Expenses – Professional Employees' Association Staff

Procedural Authority: Vice-President Finance and
Operations

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

Effective Date: July 2024

Supersedes: 2015

Last Editorial Change:

Parent Policy: [Professional Development Expenses and Leave: Professional Employees' Association Staff \(HR6420\)](#)

Purpose

- 1.00 The purpose of this document is to set out procedures for administering the Central Professional Development Fund (the Central Fund) and procedures to be followed when eligible PEA staff members are requesting approval for professional development expenses from this fund.

Definitions

- 2.00 **Eligible Expenses** are expenses eligible for reimbursement, as follows:
- 2.01 Travel including accommodation, tuition, course or registration fees and other expenses for conferences, workshops, seminars, meetings of professional and business organizations and other similar activities;
 - 2.02 Up to one (1) membership fee in a learned society or professional organization where membership is a requirement of employment by the University; and
 - 2.03 Expenses (e.g., books, journals, materials, page charges, reprints, interlibrary loan charges) directly associated with professional responsibilities.

Note, as non-taxable benefits, items reimbursed from the Central Fund through section 2.03 will remain the property of the University.

Administration of the Central Fund

- 3.00 A standing Joint Committee will be established comprising of two (2) representatives designated by the University and two (2) representatives designated by the PEA. In accordance with the criteria and procedures set out below, this committee will:
- 3.01 Receive, review and adjudicate applications to the Central Fund; and
 - 3.02 Allocate funds from the Central Fund.

Application Procedures

- 4.00 Eligible PEA staff members may apply to the Central Fund as follows:
- (a) Complete the [application form](#) demonstrating that the expenditure will benefit the university which ensures non-taxable status consistent with Canada Revenue Agency's guidelines;
 - (b) Submit the application form to the immediate supervisor for evaluation and confirmation of the benefit to the university; and
 - (c) Submit the completed application form with Supervisor-approval to the Joint Committee c/o Human Resources, as per the posted submission date.

Criteria and Procedures for Distribution of Funding

- 5.00 An application for funding from the Central Fund may not be less than \$250 and may not normally exceed \$2000. In exceptional circumstances, the Joint Committee may approve applications up to a maximum of \$3000. The Central Fund can typically reimburse up to \$2000 for Eligible Expenses incurred for UVic activities (UVic coursework, UVic conference), and up to \$1500 for Eligible Expenses incurred elsewhere.
- 6.00 The Joint Committee will operate as follows:
- (a) The Joint Committee will review applications as per the posted schedule in each academic year (July to June).
 - (b) The Joint Committee will publish application deadlines at the beginning of each academic year.
 - (c) Applications will be considered on a first-come, first served basis providing:
 - The applicant's PDEA is already depleted; or
 - The applicant's PDEA will become depleted as a result of this application and requires top-up from the Central Fund; or
 - The applicant has not been granted funding from the Central Fund during the 12 month period preceding the current application.
 - (d) The Joint Committee will consider group applications for those members attending the same event, workshop or conference, although claims are administered individually.
 - (e) The joint Committee will consider costs associated with approved job swaps or secondments.
 - (f) The Joint Committee will acknowledge all applications to the Central Fund in writing.
 - (g) The Joint Committee will approve eligible applications until Central Funds are depleted.
 - (h) The Joint Committee will provide written notification of their decision to each applicant.
- 7.00 Any available funds not allocated within a given application period will be carried forward to the next period. Any available funds that have not been allocated by the end of the academic year will be carried forward to the next year.

Approved Expenditure Procedures

- 8.00 Approved funding from the Central Fund must be accessed from the Central Fund and claimed for reimbursement within six (6) months of the application deadline date as follows:
- (a) The successful applicant may proceed to purchase and pay for the approved Eligible Expense.
 - (b) The successful applicant must complete and submit a reimbursement claim, original receipts or electronic receipts, and a copy of the Joint Committee's approval letter to Financial Services.
 - (c) Eligible expenses will first be applied as outlined in the joint committee approval letter
- 9.00 An application for an Eligible Expense that is accepted but only partially funded, may not be re-submitted for consideration in a future period by the applicant.

Review of Application Decision

- 10.00 Applicants whose application to the Central Fund is not approved may request in writing, that the Association/University Committee established under the PEA Collective Agreement conduct a review of the application and the decision and, if appropriate, make a recommendation to the Vice President Finance and Operations, or designate. The VPFO's decision will not be subject to the grievance and arbitration procedures.