

Professional Development Expenses: Guidelines for Management Excluded Staff

See Policy: [HR6400](#)

Purpose:

The University recognizes the value of a management 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 this funded program and [Policy](#) to support individual professional development for the Management Excluded employee group. For purposes of this Policy, professional development includes those activities which enhance the knowledge, performance, or career progression of an employee's work at the University and contributes to the successful achievement of the University's mission.

Who Is Eligible?

Full-time continuing Management Excluded employees will receive a \$500 allowance in a Professional Development Expense Account for this purpose.

The annual allowance is calculated according to employment status in the academic year (July 1-June 30).

Further, this amount is prorated for:

- a) individuals who have part-time positions in proportion to their appointment at July 1;
- b) individuals employed for less than a full year, including individuals who retire or resign during the course of the academic year and those who take up appointments after July 1; or
- c) individuals on leave, other than maternity or parental leave, during the academic year.

Consequently, for example, employees retiring on June 30 receive no professional development while those retiring on December 31 receive 50% of the current entitlement.

Eligible Expenses:

Expenses eligible for reimbursement are as follows:

- a) travel (including accommodation), registration fees and other expenses for workshops, seminars, professional organizations and other similar activities;
- b) membership fees in learned societies and professional organizations;
- c) expenses (e.g., books, journals, software, materials, page charges, reprints, interlibrary loan charges) directly associated with professional responsibilities; and
- d) equipment (e.g. computer equipment, including laptops, tablets, smartphones and audio-visual equipment) directly related to current duties and/or an approved learning/career development plan.

Additional Requirements:

Airfare: Economy class only.

Computer equipment: Requires [Technical Approval](#) from the Technology Solutions Centre.

Ineligible Expenses:

- Air travel cancellation insurance
- Big screen TVs
- Briefcases or luggage
- Business or first class travel
- Childcare expenses
- Data plans and home internet
- Digital or video cameras
- Entertainment expenses and gifts
- E-readers and MP3 players
- Fines, late or change fees
- Gaming systems
- Medical costs or prescriptions
- Monitors over 27"
- Office furniture and furnishings
- Office supplies for home use
- Passports or Visas
- Personal clothing other than safety gear or regalia
- Personal living expenses while on leave
- Recreational or lifetime membership fees
- Recruitment expenses
- Salaries or honorariums
- Service costs for equipment
- Third party work, services or expenses
- Toner cartridges
- Travel costs of another individual
- Travel guide books

Prior Approval and Original Receipts

Claimants 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 these Guidelines. Requests for reimbursement of items or equipment purchased following formal notice of resignation or retirement must be pre-approved in writing by the employee's Vice-President.

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.

A claim for reimbursement for approved, Eligible Expenses must be submitted to the immediate supervisor. Claims must be supported by **original** receipts.

Membership Fees:

The policy continues the practice of enabling management excluded staff to use the Professional Development Expense Account to pay for membership fees in learned societies and professional organizations. Please note that another source for reimbursement for professional fees for management excluded staff, where that membership is a requirement of the position, is from departmental funds. Use of department funds would be subject to the normal approval processes and may be used to support a maximum of one (1) membership per person.

Ownership:

Items and equipment purchased through the Professional Development Expense Account are the property of the University. Upon retirement or termination of employment assets acquired through the Professional Development Expense Account must be returned to the department. If the University is unable to re-allocate the assets the employee may purchase the assets at its current fair market value by contacting [Purchasing Services](#).

Assistance:

For assistance with the application of this policy, please contact [Accounts Payable](#).