

**PROFESSIONAL DEVELOPMENT
EXPENSES AND LEAVE –
MANAGEMENT EXCLUDED STAFF**

University Policy No.: HR6400
Classification: Human Resources
Approving Authority: President
Effective Date: March 17, 2014
Supersedes: September/98
Last Editorial Change: April 30, 2014
Mandated Review: March 17, 2021

Associated Procedures:

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

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

PURPOSE

- 1.00 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.

DEFINITIONS

For the purposes of this policy:

- 2.00 **Eligible Expenses are** expenses eligible for reimbursement, 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.
- 3.00 **Management Excluded** means union-excluded employees of the university covered by the Management Excluded Terms and Conditions of Employment.
- 4.00 **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.

5.00 **Professional Development Expenses Account** means the account established, for each eligible employee, by the university to track the deposit of the annual professional development allowance and withdrawals of Eligible Expenses.

SCOPE

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

POLICY

7.00 Effective July 1st of each year, full-time continuing Management Excluded employees will receive a \$500 allowance in a Professional Development Expense Account for this purpose.

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

7.02 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 declare their intention to 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 who have declared their intention to retire on December 31 receive 50% of the current entitlement.

7.03 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.

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

9.00 Professional Development Leave

- 9.01 Professional Development Leave is encouraged and supported through the annual performance planning cycle.
- 9.02 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.
- 9.03 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.
- 9.04 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 the Associate Vice-President Human Resources before giving final approval to ensure that practices are consistent where appropriate.

AUTHORITIES AND OFFICERS

- (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

[Travel and Business Expense Policy \(HR6500\)](#)

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

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: March 17, 2014

Supersedes: New

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 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 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.

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

- 5.00 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. Claims for purchases made prior to retirement or termination will be accepted up to 60 days after termination.
- 6.00 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.