

CUPE Local 2773
Professional Development Fund
Terms of Reference and Procedures
(Approved October 2022)

The CUPE Professional Development (PD) fund is meant to assist employees to upgrade skills that enhance and/or advance their careers within the College as well as the provincial College system. Employees may be asked to provide their personal professional development plan to support their request.

Funding

Professional development funding will be made available as follows:

Local collective agreement – As provided for under Article 18.2 of the local collective agreement, all Regular and Term employees are eligible to apply for reimbursement of work or career related courses/activities of up to a maximum of \$600 per fiscal year (registration, tuition fees and assigned reference materials).

A lump sum of 1.0% (0.75% Ministry; 0.25% COTR) of the annual support staff payroll will be contributed to the CUPE PD Fund. Unused funds from the Ministry/COTR contribution will be carried over from fiscal year to fiscal year.

College contribution each fiscal year, the College will contribute \$2,000 to the CUPE PD Committee Fund which will be used for CUPE Professional Development Days (two days). Unused funds from the College contribution will not be carried over from fiscal year to fiscal year.

Funding Priority

Individual requests, group requests and then educational leaves.

Fund Administration

Local collective agreement, Accord and CUPE PD Development Days monies will be allocated by a joint committee comprised of three (3) CUPE members [one (1) CUPE member will act as an alternate] as elected by the CUPE membership, and two (2) management group members as appointed by the President & CEO.

With the exception of the Chair, the tenure of membership for elected/appointed members shall normally be for a two-year period with the possibility of an additional two-year renewal.

Meetings

The CUPE PD Committee will hold meetings as required. Applications and other committee business issues will be communicated to committee members via e-mail and decided on the basis of majority votes.

Types of Funding Requests

Article 18.2 - Reimbursement

- a) Regular and Term CUPE members are eligible to apply to the CUPE PD Committee for reimbursement of work or career related activities/courses of up to a maximum of \$600 per fiscal year (registration, tuition and assigned reference materials).
- b) Regular Sessional CUPE members are eligible to apply to the CUPE PD Committee for reimbursement of work or career related activities/courses that are taken during their session as well as during designated seasonal layoff periods.
- c) Regular CUPE members who have received a notice of layoff are eligible to receive reimbursement of work or career related courses as long as the request was made and the course is completed prior to the effective date of layoff.
- d) Employees on a general leave of absence (GLOA) as per Article 14.5 of the Collective Agreement between College of the Rockies and CUPE local 2773 will be eligible to apply for reimbursement of expenses associated with PD activities while they are on a GLOA. In order to be eligible for reimbursement, the employee must return to the College, complete a minimum of six months employment with the College and the PD activity must fall within the guidelines set-out in the terms of reference.

Accord Funding - Individual Requests

- a) When a Regular member exhausts their \$600 fiscal year maximum, they are eligible to apply to the CUPE PD Committee for Accord funding (registration, tuition, travel and assigned reference materials) for up to a fiscal year maximum of \$1,500.00.
- b) When a Term member exhausts their \$600 fiscal year maximum, they are eligible to apply to the CUPE PD Committee for Accord funding (registration, tuition travel and assigned reference materials) for a pro-rated amount of the maximum fiscal year allocation. This pro-rated amount will be based over the length of their term appointment. Example: $\$1,500.00 \times 7/12 = xxx$
- c) After working a minimum of 450 hours (equivalent to a three month probationary period) within the bargaining unit, an Auxiliary member becomes eligible to apply to the CUPE PD Committee for Accord funding of 5% of their previous calendar year earnings to a maximum of \$1,500.00 per fiscal year.
- d) Regular CUPE members who have received a notice of layoff are eligible to receive funding assistance from the CUPE PD Committee as long as the request was made and the course/activity is completed prior to the effective date of layoff.

Individual Requests in Excess of Fiscal Year Allocation:

“Effective April 1, 2018 CUPE members who have exhausted both their collective agreement and Accord funding maximums for the current fiscal year may be eligible for supplemental reimbursement of tuition, reference materials and travel not covered by their original application(s).

The CUPE PD Committee will assess the merits of all individual requests for additional funding on the following factors:

- Available funding
- Previous funding assistance granted.

All applications will be reviewed throughout the fiscal. Reimbursement priority will be tuition, reference materials, and then travel expenses as per College Policy 3.2.5. The maximum available under this provision for any one individual will be up to \$1,000 per year based on funding availability. Available funds annually will be \$30,000. If the applicant resigns from the College before one calendar year of receiving the supplemental funds, the employee will be responsible for repaying the amount.

Individual Requests for Members Pursuing Advanced Education.

“Effective October 1, 2022, CUPE members who are pursuing professional designations and have exhausted their collective agreement, Accord funding, and supplemental maximums for the current fiscal year may be eligible for additional reimbursement of tuition, reference materials and travel not covered by their original application(s).

The CUPE PD Committee will assess the merits of all individual requests for additional funding on the following factors:

- Available funding
- Previous funding assistance granted.

All applications will be reviewed throughout the fiscal. Reimbursement priority will be tuition, reference materials, and then travel expenses as per College Policy 3.2.5. The maximum available under this provision for any one individual will be up to \$2,000 per year based on funding availability. Available funds annually will be \$30,000. If the applicant resigns from the College before one calendar year of receiving the supplemental funds, the employee will be responsible for repaying the amount.

Accord Funding – Group Requests

A maximum of \$10,000.00 from each fiscal year's Accord Funding will be set aside for all group activities. Group activities may be shared between individual and group funds. (in some cases employees may be asked to use their personal PD funds as well as group funds. Group funds will be limited to \$2,500.00 per activity, but the committee has the authority to increase that amount to support activities for Professional Development days.

- Group funding is available to a group of CUPE staff wishing to participate in a professional development activity which has a purpose common to the needs of the group and is opened up to all CUPE members. Reimbursement priority will be tuition, registration fees, and reference materials.
- Funds can be used to help sponsor events for the two assigned Professional Development days each year.

NOTE: When CUPE members are requested by the College to attend provincial or national agencies/associations meetings, funding assistance for these activities may be cost shared with the appropriate department.

Information Sharing

Following the completion of an individual course, activity, workshop or conference, CUPE members are required to submit a brief written report to the CUPE PD Committee. Future reimbursement requests will not be approved until the report has been submitted. This information will be shared with other CUPE members who may have an interest in attending the same or similar offering. CUPE members may also be requested to present their experience and knowledge of the course/activity/workshop/conference with other CUPE members.

Reimbursement and Prior Learning Assessment (PLA)

Regular, Term and eligible Auxiliary CUPE members are eligible to apply for tuition reimbursement when course credit is obtained through a prior learning assessment at the College of the Rockies or another recognized educational institution. An official transcript (or in the case of industry certification, a letter of completion) and original receipt(s) must accompany requests for tuition reimbursement.

Reimbursement

Complete and forward a Course/Activity Request Form (Part I) to your immediate supervisor. Your immediate supervisor will review your request and approve any absence you may require from your normal work hours to complete the requested course/activity. Once your immediate supervisor recommends the course/activity, the form will be forwarded to the CUPE PD Committee for determination as to whether the course/activity is eligible for reimbursement. The CUPE PD Committee will notify you and your immediate supervisor(s) via e-mail as to the status of your request.

Accord Funding – Individual and Group Requests

Complete and forward a Course/Activity Request Form (Part 2) to your immediate supervisor(s). Your immediate supervisor(s) will review your request and approve any absence you may require from your normal work hours to complete the requested course/activity. Your immediate supervisor(s) will then forward the form to the CUPE PD Committee for determination as to whether the course/activity is eligible for reimbursement. The CUPE PD Committee will notify you and your immediate supervisor(s) via e-mail as to the status of your request.

Reimbursement Criteria

The CUPE PD Committee will review and make a determination if the course/activity to be undertaken is eligible for reimbursement by considering the following.

Does the course/activity add specific skills, knowledge, and/or competencies that the employee can apply to her current position?

Does the course/activity add skills, knowledge and/or competencies for the employee's career advancement within the College?

Accord Funding Reimbursement Criteria - Individual Requests

The CUPE PD Committee will assess the merits of all individual requests on the following factors (not in order of priority):

- available funding;
- the value to the CUPE member(s) of the experience sought by the CUPE member(s) i.e. will the course/activity add skills, knowledge and/or competencies that will assist the CUPE member(s) in their career advancement within the post-secondary system; other

funding sources or cost-sharing arrangements available to assist with the proposed course/activity.

- the comprehensiveness of the request.

Accord Funding Reimbursement – Group Requests

The CUPE PD Committee will assess the merits of a group request for funding on the following factors (not in order of priority):

- applications will be processed on a first come, first served basis;
- available funding;
- other funding sources or cost-sharing arrangements available to assist with the proposed course/activity;
- previous funding assistance granted.

Approval of Funding Requests

Requests for funding will be decided by a majority vote of the committee. When a CUPE member who is also a member of the CUPE PD Committee submits a request for funding, the alternate CUPE PD Committee member will be invited to participate in the assessment/approval process.

Disbursement of Funds

With the exception of courses/activities which require registration pre-payment, all disbursements will be handled on a reimbursement basis or if on an approved leave of absence, upon return to the College of the Rockies. To initiate a reimbursement, you will be required to send supporting evidence of successful course/activity completion along with any receipt(s) for registration, tuition fees and assigned reference materials to the Human Resource Development Department. A cheque requisition will be initiated and sent to Financial Services/Accounts Payable for processing. Reimbursement of work-related courses/activities is not taxable.

Payment in Advance

Where payment of tuition and assigned reference materials represents an impediment to taking a course/activity, an employee may request payment in advance of the course/activity. Complete tuition and assigned reference costs must be provided at the time of request. Requests for payment in advance will require the employee to sign a form which states their need for pre-payment and their agreement to pay in full, through payroll deduction, should they be unsuccessful, not complete a course or if they resign from the College prior to completing the course/activity.

Travel Assistance

Regular, Term and eligible Auxiliary CUPE members may apply to the CUPE PD Committee for reimbursement of travel and associated expenses related to approved course/activity requests. Approved travel and associated expenses will be reimbursed according to the procedures set out in College policy 3.2.5. – *Travel and Expense Claims*.

Regardless of the source of funding for tuition, registration and assigned reference materials (Article 18.2 or Accord), approved travel and associated expenses will be charged against an individual member's Accord eligibility (up to a fiscal year maximum of \$1,500.00).

Activity/Course/Program Cancellation

When a course or activity is cancelled by the sponsoring organization/institution, monies allocated will be returned to the PD fund for re-allocation. NOTE: The employee(s) impacted by such cancellation will have first preference to apply and receive the same or less monies for another PD course or activity.

Completion of Course/Program

Employees must pass all courses that are taken, if a course is not completed or the employee fails, it is their responsibility to reimburse the College.

Review Process

The parties agree that the CUPE Local 2773 Professional Development Fund Terms of Reference and Procedures will be reviewed annually, and as required be amended to reflect any needed changes.

(Approved October 2002; Amended October 2003; Amended April 2005; **Amended February 2008, Amended November 2009 amended 2014**)