

# **CUPE 1870 Professional Development Fund Committee Terms of Reference**

## **1. Purpose**

The CUPE 1870 Professional Development Fund (PDF) has been established as a negotiated benefit between the University of Prince Edward Island and CUPE 1870. The Professional Development Fund is jointly funded by the operating budgets of the University of Prince Edward Island Main Campus (UPEI main campus) and the Atlantic Veterinary College (AVC) and is intended as a mutual benefit to both support CUPE 1870 employees and the University itself.

## **2. Goals**

To administer a central budget in the amount of \$25,000 per annum effective May 1, 2011 to enable eligible CUPE 1870 employees to access learning and professional development opportunities including but not limited to courses, workshops, seminars, books, software and materials, etc. that will:

- develop professional attributes, abilities and skills;
- enhance work performance, capacity or effectiveness;
- prepare for an expanded or different role;
- contribute overall to the successful achievement of the University's mandate.

To provide an incentive and mechanism for CUPE 1870 employees at the University of Prince Edward Island to take an active role in their professional development.

## **3. Administration**

The CUPE 1870 PDF is administered by a standing Joint Committee (the PDF Committee), comprised of six (6) representatives from CUPE 1870 and one (1) representative of the Vice-President Administration & Finance. The Committee will:

- a) Adjudicate proposals and allocate funds from the CUPE1870 PDF;
- b) Receive, review, maintain and approve applications to the CUPE 1870 PDF in accordance with the criteria and procedures set out in the guidelines for the PDF; and
- c) Maintain a database of all applications and funding decisions;
- d) Provide an annual report and review of the program at the end of each fiscal year to CUPE 1870 and Vice-President Administration & Finance. The report will provide an overview how funds were dispersed that year, compare it to other years, and the types of activities the fund was used on.

The PDF Committee shall appoint a Chair and Committee Administrator, the duties of whom are outlined in Section 4. Records shall be housed in the Human Resources Department.

## **4. Committee Structure**

The Committee will consist of 7 representatives:

### **CUPE 1870 representatives (6):**

- two Administrative staff members (ADS) (1 from UPEI main campus and 1 from AVC);
- three Members of Technical Staff (MTS) representing Research, Service and Teaching;
- one Programmer Analyst (PA)

### **Vice-President Administration & Finance (1):**

- one representative

### **Committee Chair and Committee Administrator**

- By majority, the committee will nominate and elect one representative as Chair and one representative as the Administrator.
- The role of the Chair is to facilitate the meetings and to collect all applications for review. The Chair will ensure that each committee representative is provided a copy of the applications for each meeting.
- The role of the Administrator is to log all applications and to keep an electronic record of the outcome of the applications.
- After each meeting is concluded, the Chair will notify the successful applicant, the successful applicant's supervisor and UPEI Human Resources Department.
- On behalf of the committee, the Chair will notify the unsuccessful applicants in writing.
- All correspondence from the Chair will be copied to the Administrator.
- All records shall be housed in the UPEI Human Resources Department.

Quorum: Consists of 3 CUPE 1870 representatives and the Vice-President Administration & Finance representative.

## **5. Terms of Members**

Initial members will be appointed to one, two or three-year renewable terms in order to avoid complete turnover following the first term. Subsequent terms will be 3 years in duration.

Proposed amendments to the Terms of Reference are subject to approval by both the CUPE 1870 PDF Committee and the Vice-President Administration & Finance.

# CUPE 1870 Professional Development Fund Guidelines

## 1.0 What is the CUPE 1870 Professional Development Fund?

The CUPE 1870 Professional Development Fund (PDF) has been established as a negotiated benefit between the University of Prince Edward Island and CUPE 1870. The Professional Development Fund is jointly funded by the University of Prince Edward Island Main Campus and the Atlantic Veterinary College and is intended as a mutual benefit to both support CUPE 1870 employees and the University itself. The primary purpose of the PDF is to enable eligible CUPE 1870 employees to access learning opportunities that will:

- 1.1 develop professional attributes, abilities and skills;
- 1.2 enhance work performance, capacity or effectiveness;
- 1.3 prepare for an expanded or different role; or
- 1.4 contribute overall to the successful achievement of the University's mandate.

## 2.0 Who is Eligible to Apply?

Current CUPE 1870 employees with one year of **service** hereinafter referred to as eligible employee.

## 3.0 Eligible Expenses:

The PDF will cover costs such as: course fees, conference fees, course materials, books, examination fees, and where applicable, reasonable out-of-town expenses for travel, meals and accommodation (according to the UPEI Travel policy):

[https://files.upei.ca/policy/travel\\_expenses\\_policy\\_admfinfo0001.pdf](https://files.upei.ca/policy/travel_expenses_policy_admfinfo0001.pdf)

The following types of initiatives and learning opportunities are generally funded:

- 3.1 Job-related conferences, seminars or workshops;
- 3.2 Communication and interpersonal skills;
- 3.3 Conflict resolution;
- 3.4 Time management and organizations skills;
- 3.5 Computer skills

## 4.0 Ineligible Expenses:

The following lists the types of courses/expenses that will **not** be funded by the PDF:

- 4.1 General interest courses (eg. hobbies, crafts, recreational memberships);
- 4.2 Job-specific training required for the eligible employee's current role;
- 4.3 Specific training required by legislation for the eligible employee's current role;
- 4.4 UPEI credit courses covered by staff tuition waivers. The UPEI policy on staff tuition waivers is available via:

[https://files.upei.ca/policy/university\\_employee\\_tuition\\_waiver\\_policy\\_admhrtd0001.pdf](https://files.upei.ca/policy/university_employee_tuition_waiver_policy_admhrtd0001.pdf)

- 4.5 Funding of a long-term educational degree from any other university or institution.
- 4.6 Fitness classes, gym memberships, weight reduction programs.

## 5.0 Application and Reimbursement Procedures:

The CUPE 1870 employee applying to the PDF for reimbursement of expenses shall:

- 5.1 Complete the prescribed application form demonstrating that the expenditure will benefit the University in compliance with Revenue Canada guidelines for non-taxable benefits;
- 5.2 Submit the completed application form to the CUPE 1870 employee’s Department Chair, Director or Manager for evaluation of the benefit to the University, and pre-approval.
- 5.3 Submit the completed application form to the Chair, CUPE 1870 PD Fund c/o Human Resources. Written notification from the Committee that the application has been approved will be sent to the employee and copied to the Department head. The CUPE 1870 employee may then make purchases and pay for the professional development expenses in accordance with that approval.
- 5.4 Submit the reimbursement claim and original receipts to the Administrator for processing by the Accounting Department. Failure to submit the appropriate claim and related receipts will result in the ineligibility for future funding.

## 6.0 Guidelines & Procedures:

- 6.1 The Committee will accept funding applications three times a fiscal year with the following deadlines:

<i>Submission Deadline</i>	<i>Decision Deadline</i>
February 1 <sup>st</sup>	February 28 <sup>th</sup>
June 1 <sup>st</sup>	June 30 <sup>th</sup>
October 1 <sup>st</sup>	October 31 <sup>st</sup>

- 6.2 The PDF Committee will notify all eligible CUPE 1870 members of the application deadlines by email.
- 6.3 Any job-specific training or course that is required to perform the day to day activities, requirements and functions of a position is not eligible for funding from the Professional Development Fund. Faculties and departments are encouraged to assist in the professional development of their employees by providing the courses and upgrading of skills required to perform day-to-day activities.
- 6.4 The PDF Committee is willing to consider any and all requests and will endeavour to distribute the funds fairly and equitably. The PDF Committee reserves the right to take into account the amount of money requested, number of proposals submitted (previous or current), timelines of proposal and previous funding approved.
- 6.5 The Committee will approve applications, based on the guidelines, until the funding available for a given period has been depleted. The Committee’s decisions shall be final. An application that is not funded may be re-submitted for consideration during the next funding period.

- 6.6 All applicants will be notified in writing of the Committee's decision. The Committee's decisions shall be final.
- 6.7 Upon receiving funding from the PDF Committee the successful applicant is required to submit a maximum, one-page written report to the PDF Committee within 30 days after completion of the course or program summarizing its value. Failure to submit the written report to the Committee will result in the ineligibility for future funding.
- 6.8 The annual allocation of PD funds of \$25,000 will be facilitated on May 1<sup>st</sup>, the beginning of each fiscal year. Annual PD funds that have not been spent by April 30<sup>th</sup> will be carried forward for one year only.
- 6.9 Amendments to the guidelines are subject to the approval of the CUPE 1870 PDF Committee and the Vice-President Administration & Finance.

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