
Excluded Support Staff Professional Development Allowance Policy

Department Policy Number

110 009

Effective Date

Revised January 1, 2002

October 15, 1991

Purpose

This policy confirms Athabasca University's support of training and development for excluded support staff, outlines the conditions under which excluded support staff can access funding, and outlines the roles and responsibilities of Human Resources and Financial Services.

Definitions

Excluded Support Support positions which are exempt from the AUPE Agreement.

CCRA Canada Customs and Revenue Agency.

Policy

Athabasca University has mandated training and development as a high priority and has dedicated funds which provide excluded support staff with training and development opportunities. The Excluded Support Staff Professional Development allowance is based on the following:

- a. Recognition that the University has the responsibility to encourage the staff member in their pursuit of professional growth and development.
- b. Recognition that the staff member has the responsibility in their pursuit of professional growth and development.
- c. Response to the organizational needs of the University to offer the choice of professional growth and development opportunities for excluded support staff.



Regulation

The guidelines issued by CCRA as they pertain to assessing the taxability of employer paid educational costs.

Procedure

1.0 Eligibility

- 1.1 Excluded support staff who occupy a permanent position are eligible for an annual professional development allowance in the amount of \$850.00.
- 1.2 For mid-year commencement or part-time employment, the allowance will be prorated.

2.0 Fund Procedures

- 2.1 The allowance is made available at July 1st of each year.
- 2.2 The professional development allowance can be accumulated for a period of five years eligibility.
- 2.3 Human Resources establishes a professional development allowance account for each eligible employee and initiates the annual allocation. Financial Services maintains a running balance of the account's activity. Information on account activity and balance is available upon request from Financial Services.

3.0 Expenditures

- 3.1 Eligible expenditures must relate to the staff members duties and responsibilities or professional growth and development which mutually benefits both the employee and the University. Eligible expenditures are in the general nature of:
 - a. books, magazines or subscriptions
 - b. fees for seminars and workshops
 - c. tuition fees for formal courses or programs of study provided by educational institutions
 - d. travel expenses relating to career development activities
 - e. capital equipment in accordance with the Micro Computer Equipment Policy.



4.0 Process

- 4.1 The staff member must initially pay for the material or service and will be reimbursed upon proof of payment (see Travel & Expense Claim Policy and Micro Computer Policy for purchases of capital equipment).
- 4.2 All claims must be made on the Athabasca University Expense Claim Form, supported by original receipts, and forwarded to Financial Services for processing.
- 4.3 Where an expense advance is required, the Athabasca University Expense Claim Form is to be completed and forwarded to Financial Services for processing.
- 4.4 If leave is required, this must be approved separately by the staff member's supervisor on a Leave Request Form and forwarded to Human Resources.

5.0 Tax Implications

- 5.1 There are no tax implications resulting from the administration of this policy, according to the current Income Tax regulations, as both the University and the staff member benefit from the terms of this policy and all expenditures are supported with original receipts.

6.0 Termination

- 6.1 The balance of the professional development allowance assigned to the staff member will revert back to Athabasca University on termination of employment with the University.
- 6.2 When a staff member's appointment with the University changes and under the new appointment the staff member is not eligible for an annual professional development allowance, the balance in the staff member's individual professional development fund will revert to the University.
- 6.3 In the event of termination or change of appointment, the staff member may continue to incur eligible expenses from their individual professional development funds up to the effective date of the termination or change in appointment. A final expense claim must be received by Financial Services within one month of the effective date.

Approved by

President

Amended Date/Motion No.

Related References, Policies, and Procedures

Purchase of Micro Computer Equipment Using PD Funds (110 004) Policy
[Athabasca University Travel and Expense Claim Policy](#)



Applicable Legislation/Regulation

[CCRA Income Tax Regulations](#) as it pertains to Taxable Benefits
[Alberta Freedom of Information and Protection of Privacy Act](#)

Responsible Position/Department

This policy is maintained by Human Resources and administered by Financial Services.

Keywords

Excluded Support Staff Professional Development Funds