
Accessing the Flexible Benefit Plan for Excluded Management and Excluded Professional Staff Procedure

Policy Sponsor:	Director, Human Resources
Name of Parent Policy:	Flexible Benefit Plan for Excluded Management and Excluded Professional Staff
Policy Contact:	Human Resources
Procedure Contact:	Human Resources
Effective Date of Procedures:	January 1, 2010
Review Date:	Annually

Purpose

To provide information on how excluded managers and excluded professional staff can access the Flexible Benefit Plan.

Definitions

Deferred Salary Leave Plan (DSLPL)	A plan that allows a member to defer a portion of total monthly salary and flexible stipend to fund a future leave, following Canada Revenue Agency requirements for such plans.
Excluded staff	For purposes of this policy, excluded staff members are excluded managers and excluded professional members, that, by virtue of their employment roles, have an excluded employment contract with the University. Their positions are out-of-scope and excluded from membership in a union or faculty association, and therefore are not covered under one of the collective agreements.
Flexible stipend	An amount, generally a percentage of salary, that may be available to members as a monthly stipend payment and/or additional vacation credits.



Learning leave

A leave of absence with full or reduced pay for the purpose of enhancing the professional performance of the Plan member in their assigned role(s) at the University.

Procedure

Flexible Stipend

Once each year, a member can select to receive the flexible stipend as extra vacation.

- A. A flexible stipend can be selected, to be received as extra vacation in the year, an increase in monthly pay or a combination of the two. Based on a 9% flexible stipend, the flexible stipend options, to be selected annually, are:

<u>Extra vacation stipend</u>	<u>Monthly stipend</u>	<u>Total stipend</u>
0% - None	9%	9%
2% - One week	7%	9%
4% - Two weeks	5%	9%
6% - Three weeks	*3%	9%
8% - Four weeks	*1%	9%

This election will be made annually, in advance of each January 1, to be effective for each calendar year.

The default is a monthly stipend with no extra vacation.

The stipend will be reported separately in the payroll records, and will not be considered normal salary for purpose of salary grid comparisons with in scope staff (shadow comparisons) and long service increments.

The stipend will not be subject to COLA, except as the employee's base salary is adjusted by COLA.

- B. As in option A above, a 9% flexible stipend can be selected, to be received as extra vacation in the year, an increase in monthly pay or a combination of the two. A member can also choose to participate in a Deferred Salary Leave Plan (DSLPL), as outlined in the respective DSLPL policy.

* Approval of a member's supervisor is required in advance for these options – that is, for the three (3) and four (4) week vacation options for the Flexible Stipend, and also the Learning Leave option.



Learning Leave

An application for leave, learning plan and approval are needed, and attempts will be made to accommodate leaves operationally (i.e., will not be unreasonably denied). Members accrue two months of leave for every full year worked, and the learning leave options are:

- C. An approved learning leave will be paid at 80% of regular pay [16-2/3% entitlement per year of service = 2 months/12 months].
- D. A full salary option will allow members taking an approved learning leave to be paid 100% of regular pay. The learning leave entitlement is then reduced proportionately [effectively 13-1/3% entitlement per year of service = 2 months/12 months x 80%].

During a learning leave, the terms and conditions outlined in the employment contract continue to apply.

Within a month of returning from a learning leave, the member shall provide to the supervisor a report on the leave accomplishments.

Any COLA and merit adjustments will apply when members are on leave.

Approvals

Approval of the appropriate Executive Officer is required before a learning leave can be taken.

Applicable Legislation and Regulations

Income Tax Act

Related References, Policies, Procedures and Forms

[Flexible Benefit Plan for Excluded Management and Excluded Professional Staff Policy](#)

Flexible Benefit Plan Allocation Form (in development)

[Health Spending Account Claim Procedures](#)

History

Athabasca University Flexible Benefit Plan May 2006 Guidelines