

UFV'S IN-SERVICE PROFESSIONAL DEVELOPMENT (PD) PROGRAM GUIDELINES

Please click the links below to be directed to the relevant information in this document.

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Note: To see general PD information, application & expense claim process, PD forms, frequently asked questions (FAQs), and available support, please visit our [UFV PD website](#).

PD CRITERIA

The following criteria have been established by the Joint Professional Development Committee for the administration of the In-Service Professional Development Fund.

An In-Service Professional Development application must meet the general criteria listed below and contribute to the professional development of the employee by:

- Developing and upgrading UFV job-related skills, knowledge, tasks and philosophies and/or;
- Preparing for reasonable career advancement within UFV in an area relevant to and available at UFV (a reasonable expectation must exist that advancement may result from pursuing the activity) and/or;
- Identifying the value to the institution related to UFV strategic goals (wellness, indigenization, EDI, etc.)
- Applications for activities/events which are reasonably similar in content and available in multiple locations should reflect the PD event (location/mode) that provides the best value in terms of cost and content. Applicants will provide a rationale for why a travel location/mode was selected and why that selection is preferable to alternative offering.

TIPS FOR SUPERVISORS in approving a PD application

As a direct supervisor, what is my role in reviewing and approving PD applications?

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the in-service Professional Development criteria above. If the direct supervisor is not an exempt administrator, then the application will require a second signature from the exempt administrator. If it is felt that an application does not meet the criteria, the supervisor / exempt administrator may decline to support the application.

If an application meets the criteria, it may still be declined if it is determined that the leave would disrupt the operation of business at UFV (staff shortages, peak operational periods, critical projects or tasks, customer or client impact, etc.). Practical/reasonable logistical adjustments to accommodate PD activities are expected.

NOTE: all applications that are declined must include full rationale from the supervisor/exempt administrator for their decision when submitted.

All applications must be submitted to in-service PD whether they are supported by the supervisor or not. The PD Assistant will send the final approval or rejection notice to the employee once reviewed.

Things to consider when reviewing applications:

- How will this activity contribute to the professional development of the employee and how will it directly link back to UFV?
- In what specific way will the activity develop or upgrade the employee's UFV job-related skills?
- What is the relationship between the activity and current or near future employment opportunities for this employee at UFV?
- How is the activity of value to the institution?
- Has the employee explored all cost-effective learning options that may be offered locally?
- How will the activity further UFV's strategic goals?
- Is the activity a requirement of the department or position? If so, then the activity is NOT an approvable professional development application and should be funded through the employee's department.

PD Eligible & Non-Eligible Expenses Guidelines

Please see below lists of [eligible expenses](#) and [non-eligible PD activities / purchases](#).

PD ELIGIBLE EXPENSES

1. AIRFARE

- Travel must be at the most reasonable economy class rate
- Upgrades that are medically necessary must be communicated to the JPDC and approved prior to the event or activity
- Travel medical insurance coverage is not a reimbursable expense
- Flight cancellation insurance is not an approvable expense
- One checked bag and a personal item is acceptable
- Required airport improvement fees, security NAV Canada and fuel surcharges are acceptable PD expenses
- Travel Visa fees where required are allowable expenses

2. ACCOMMODATIONS

- When attending an event, conference, symposium, annual meeting etc., it is acceptable to stay at the hotel where the event is being hosted
- Where there is no host venue for an event, conference, symposium, annual meeting etc., accommodation expenses are limited to reasonable amounts which normally will not exceed the rate of a single standard room.

When booking for approved PD activities accommodations must comply with the following guidelines:

- If the conference site imposes mandatory resort fees, In-Service Professional Development will reimburse this expense
- Internet charges are allowable
- No hotel upgrades
- No fitness centre/health club fees
- No pet fees/charges
- No hotel telephone charges

Within the lower mainland the following additional rules apply:

- Single day conference in the Fraser Valley/Lower Mainland
 - Accommodation is not an approvable expense
- Two day or multi-day conferences in the Fraser Valley/Lower Mainland
 - Accommodation is approvable for the evening(s) between the conference days
- Accommodations are approvable as long as they don't exceed the conference hotel rate

Outside of the Lower Mainland:

- When travel time is needed to reach a destination outside of the lower mainland, per diems and travel expenses will be reimbursed a day before the event and the day after.

3. TRANSPORTATION

- Mileage can only be claimed for personal vehicles (no mileage can be claimed for rental cars)
- Either claim mileage or gas/car rental
- Parking for approved PD activities is acceptable (receipts required)
- If driving (mileage) is the least expensive travel option compared to the combined travel cost of other modes of transportation (flight, train, bus, etc.).
- In situations where it may be more economical for two or more people to travel together, carpooling is encouraged. Mileage or car rental costs may be claimed only by the driver or owner of the vehicle
- Ferry costs, ferry reservation fees, highway tolls, taxi, shuttle bus, public transit/metro and parking are acceptable PD expenses

4. CONFERENCE AND REGISTRATION FEES

- All registration fees associated with approved In-Service Professional Development activities are covered.

5. MEALS AND PER DIEMS

When attending an event, conference, symposium, annual meeting etc., meals and per diem expenses cannot be claimed when otherwise provided for, such as meals already provided by conference fees, transportation carriers, and hosts.

Please note for 1-day courses within the Lower Mainland, only lunch expense (must have detailed original receipt) or lunch per diem rate will be reimbursed.

6. REFERENCE / RESOURCE MATERIALS

All PD applications for resource materials (e.g. books, software, subscriptions, etc.) are limited to a total of 25% of an employee's current fiscal year PD allocation. For example, if your allocation is \$2,000.00 you can use up to 25% of that (\$500.00) for reference materials (books, software, subscriptions, etc.).

Common resource materials include: books, journals, software, and subscriptions.

- Faculty resource material must be applicable to the faculty member's educational background and to the relevant professional area
- Staff resource material must directly relate to current or near future professional growth at UFV

Acceptable software purchases for use to develop and upgrade current job-related skills include but are not limited to:

- Microsoft Windows operating system and upgrades
- Microsoft Office Suite (Word, Excel, Access, PowerPoint)
- Fire walls/Anti-virus/pop-up blocks
- Software required for a credit course or Continuing Studies course

Common guidelines include:

- Non-taxable benefit goods purchased with in-service professional development funds remain the property of the university until such time that fair market value equals \$0, at which time ownership is transferred to the employee.
- Items purchased are a University resource intended for the use of an individual UFV employee

- Software purchases are University owned resources that are provided to develop and upgrade job related skills
- Fund does not cover departmental required resource materials (i.e. department software purchases)
- Duplicate copies of resource material will not be reimbursed
- Benefit of purchase must be primarily to both the employee and employer

7. PROFESSIONAL MEMBERSHIPS, CERTIFICATION FEES AND RELATED APPLICATIONS, ACCREDITATIONS, REGISTRATIONS, RENEWAL FEES, ETC.

- Memberships, Certifications and other related fees must relate to your ongoing employment at UFV. The start date of the memberships and certifications must occur in the current fiscal year to be eligible for funding.

8. TUITION

- Tuition for courses which develop and upgrade your UFV job-related skills and knowledge are acceptable.

9. SELF-GUIDED STUDY TRIPS / TOUR

- The employee must provide a detailed itinerary, list of activities and timeline along with the In-Service Professional Development Application.
- Applicants must demonstrate a clear connection between study tour participation and their current professional role at UFV.
- Applicants must demonstrate how the study tour participation is an approvable professional growth activity outlined in the criteria for all approvable in-service professional development activities.

NON-ELIGIBLE PD ACTIVITIES / PURCHASES INCLUDE:

- Articulation meetings
- Office supplies, furniture and equipment
- Computers, laptops, iPods, iPads and cameras (hardware items are not eligible)
- Required training and software which should be departmental expenses
- Research equipment and supplies
- Liability insurance
- Passport fees / Visa
- Subcontract fees
- Convocation gowns
- Gym memberships and personal trainers
- Items claimed which are or will be reimbursed from any other source (Department, Grants etc.)
- Travel medical insurance coverage
- Flight cancellation insurance
- Withdrawal fees (exceptions may be considered with appropriate rationale)

PD Advance Request

- For PD application – Events and Tuition: Advances between \$500.00 and your maximum eligibility are available by completing and attaching an [ADVANCE REQUEST FORM AND AGREEMENT](#) together with your PD application form.
- Advance request together with PD application should be submitted at least 3 weeks PRIOR to your PD activity start date. Or once you get a PD approval number, you can do the purchase and submit your receipts right away through the Emburse expense management system to get reimbursement.
- Please allow up to 3 weeks for processing once received in Financial Services. Incomplete or missing information may delay processing.

PD Borrowing Additional Funds from Next Fiscal PD Allocation

- Permanent employees are eligible to request for up to two years of funding for a single event if the activity cost is more than their full annual PD allocation amount. You must have at least 50% of your current fiscal allocation in-tact to qualify.
- For an approved PD application accessing two (2) fiscal years of PD funding (approval to borrow PD funds from the next fiscal year), the approval is subject to the employee's status as an employee of UFV. You must be an employee of UFV for the duration of the approved PD activity and continue to be employed at UFV at the start of the next fiscal year, April 1st, in which the advanced PD fund was borrowed.
- If you leave your employment at UFV before the start of the next fiscal year, April 1st, for which you have been approved for the advanced PD funds, you will be required to repay the University the advanced PD funds that you borrowed.

PD Staff Only Substitute Funding

- Up to 30 hours per fiscal year may be available to fund the costs of a direct replacement for a staff employee to attend events only.