



SIMON FRASER UNIVERSITY

Learning Opportunities Fund

for Employees represented by CUPE Local 3338

1. SUBJECT: LEARNING OPPORTUNITIES FUND (LOF)

2. GENERAL STATEMENT OF PRINCIPLES

The University supports the goal of enhancing opportunities for employees to acquire work specific skills training that will enable them to more effectively perform their jobs and to increase their opportunities for promotion and advancement at the University and thereby increase employment security.

It is recognized that the ongoing acquisition of new skills contributes to the well-being and advantage of both the individual employee and the University in general. The ongoing acquisition of such work-related skills is also integral in assisting employees in their placement in the event of organizational or technological change.

In recognition of the value of such goals and objectives, the University is committed to increasing the learning development opportunities for all employees, beyond that currently provided directly by an employee's department or Human Resources.

Accordingly, the University will implement and provide funding for the Learning Opportunities Fund ("LOF"). The purpose of the LOF is to enable employees to access Job Related Courses (courses, seminars and workshops, excluding University credit courses) that will enhance each employee's performance and develop her/his skills and abilities. These opportunities include, but are not restricted to: skills development programs, courses at other recognized education institutions, conferences, non-credit continuing studies programs at the University or other recognized providers of professional learning. The expenses covered by the LOF may include, but are not restricted to: tuition costs, examination fees, conference fees, books and course materials.

3. DEFINITIONS

- 3.01 **Employee** - a person employed with no end date in a continuing position (full-time or part-time) and represented by the Canadian Union of Public Employees (CUPE Local 3338).
- 3.02 **Learning Development** - the planned growth of knowledge, skills and experience of an employee.
- 3.03 **Job Related Course** - A course (course, seminar, workshops or conference, excluding university credit courses) that adds value to an employee's performance of his/her duties and responsibilities for his/her current or a future position at the University and does not include personal growth or well-being courses.
- 3.04 **Job Specific Course** - A course that is required in order to perform a specific task in the employee's current position. For example, an EXCEL course for an employee in a position that now requires the use of EXCEL spreadsheets.
- 3.05 **University** - means Simon Fraser University
- 3.06 **Year** - refers to the fiscal period April 01 to March 31

4. RESPONSIBILITY

Employee and Supervisor (Joint):

Employees and supervisors are each encouraged to create learning and development plans and identify potential opportunities where the LOF may apply, as part of on-going learning, development, career advancement and succession planning processes.

Employee:

The employee will complete a LOF application form and will submit it to his/her immediate supervisor.

After obtaining supervisor approval and Human Resources authorization, an employee is responsible for registering for the desired course.

An employee may be requested to make a brief verbal summary to his/her supervisor of how the completed learning opportunity has met his/her learning and development objectives and/or provide a certification of completion.

Supervisor:

If the supervisor endorses the learning opportunity, he/she will indicate his/her approval on the LOF application form and will forward the form to Human Resources. If time off from work is required to attend an approved course, the Supervisor may require that the course be taken at a mutually agreeable time where the absence does not unduly affect the service levels for the department.

Human Resources:

Human Resources will be responsible for determining eligible amounts for individual employees and for authorizing payments/transfers from the LOF. Applicants should allow up to two weeks for Human Resources to process an application and give notice of authorization.

Human Resources will work with a department and/or employee where a barrier may preclude an employee from availing themselves of learning and development opportunities.

Human Resources will highlight the LOF and the provisions of Article 22 during new employee orientation. Copies of the LOF application will be available at Human Resources' website and office.

5. ELIGIBILITY AND PROCEDURAL REQUIREMENTS

- The employee must be working at the University at the time of the commencement of the Job Related Course.
- The maximum available to an employee is **\$450** per fiscal year (pro-rated for part-time staff).
- Employees are entitled to apply for funding; this does not mean that each employee automatically has **\$450** set aside for his/her exclusive use.
- Job Related Courses shall only be funded if supervisor approval and Human Resources authorization are obtained in advance of registration and attendance.
- Where the desired program of studies or course or training is available at the University, the employee shall access the University's program.

- An employee may attend a Job Related Course with costs greater than the maximum annual amount allowed under the LOF; however, any excess costs must be borne by the employee or the department. Decisions on additional funding from the department are at the sole discretion of the department.
- If an employee paid for any excess eligible cost for taking a Job Related Course funded by the LOF, s/he may submit a request between March 1 and March 31 for further reimbursement of the excess amount paid. If there are any unspent funds left in the annual amount allocated to the LOF as at March 31, then an additional amount will be equitably reimbursed to the employees based upon the number of requests and the amount unspent.
- For all Job Related Courses which are fully funded by the LOF or the LOF and the department, the employee's department will pay the Job Related Course costs on behalf of the employee directly to the institution offering the Job Related Course, wherever possible. The department will be reimbursed up to the annual employee limit by the LOF upon providing a copy of proof of payment to Human Resources along with a copy of the authorized application.
- For all Job Related Courses which are partially funded by the LOF and partially funded by the employee, the employee's department will pay for Job Related Course costs up to the annual LOF employee limit on behalf of the employee directly to the institution offering the Job Related Course, wherever possible, and the employee will pay the remainder of the costs. The department will be reimbursed up to the annual employee limit by the LOF upon providing a copy of proof of payment to Human Resources along with a copy of the authorized application. Note: Departments may choose to pay all excess costs for a Job Related Course when the cost exceeds the maximum annual amount allowed under the LOF.
- There shall be no carry over of any unused portion of an employee's yearly maximum entitlement to the following fiscal year.
- An employee is required to attend and participate in a Job Related Course for which she/he has registered unless the employee has an acceptable reason for withdrawal. Acceptable reasons include departmental operational requirements and circumstances which result in any of the leaves from work which are provided under the terms of the collective agreement. An employee may request approval to withdraw for another reason, but the granting of the request will be at the discretion of the supervisor and Human Resources. An employee who is withdrawing from a Job Related Course is required to give as much notice as possible to her/his supervisor, the administrator of the LOF in Human Resources, and the organization offering the Job Related Course.
- If, due to departmental operational requirements, an employee withdraws from a Job Related Course for which she/he has registered, then any cancellation fee or other related costs will be charged to the employee's department. If an employee withdraws from a Job Related Course for which she/he has registered for reasons other than the department operational requirements or circumstances which result in any of the leaves from work which are provided under the terms of the collective agreement, then any cancellation fee or other related costs will be charged to the LOF up to the annual employee limit and any excess costs will be the responsibility of the employee's department or the employee in accordance with the original arrangement regarding the excess Job Related Course costs. Any costs charged to the LOF due to a withdrawal will be part of the employee's annual LOF limit.
- The cost of Job Specific Courses required by the employee's department or legislation cannot be charged to the fund; this is a cost for the employee's department.
- The LOF does not cover membership or association fees.
- An employee who has registered for a Job Related Course under the LOF provisions and subsequently resigns from the University prior to commencement of the Job Related Course shall immediately notify Human Resources and the learning institution to cancel his/her attendance.
- The operational requirements of the employee's department need to be recognized when preparing and approving applications. A department may request that training be postponed to a time that is mutually convenient to the employee and department; however, operational requirements shall not be a continuing barrier to an employee taking a Job Related Course.
- Any time off work required to attend a Job Related Course under the LOF provisions shall be without loss of pay.

6. EXAMPLES OF ACCEPTABLE LEARNING OPPORTUNITIES

The following is a guide to the types of Job Related Courses that may be funded:

- Supervisory and managerial
- Team building and leadership
- Communication (including business writing skills) and interpersonal skills
- Office organization and office management skills
- Computer skills: software including programming languages and hardware (other than those specifically required for the current position: see Article 22.03)
- Non-credit courses offered by the University
- Equipment use

The LOF may provide for job skills training, including typical commercial software packages used at the University as well as specialized SFU-specific systems used by various departments.

7. NON-TAXABLE BENEFIT

Courses funded by LOF are non-taxable. To comply with Canada Revenue Agency (CRA), the learning opportunity must benefit the employer, be approved by an employee's supervisor and enhance current and/or future job career progression or performance versus being a personal interest course.

8. INTERPRETATION

Questions of interpretation or administration this fund or its procedures shall be referred to the Director, Employee Relations & Benefits.

9. DATA ANALYSIS

A copy of all authorized applications will be sent to the Union.

A semi-annual report (September 30 and March 31) of the following will be provided to the Union:

- Number of applications submitted to Human Resources
- Number of applications authorized
- Number of applications reimbursed
- Number of withdrawals or cancellations and reasons, if known
- Amount of money reimbursed from the LOF

LOF: September 2006