

OKANAGAN COLLEGE

GUIDELINES for PROFESSIONAL ALLOWANCE FUNDING FACULTY ASSOCIATION EMPLOYEES (Reference Clause 37.7)

AIMS & OBJECTIVES

Okanagan College and the Okanagan College Faculty Association jointly recognize that employees have a contractual obligation to maintain competence and currency in their areas of specialization, and in order to satisfy this contractual obligation employees may incur expenses for which reimbursement is not normally available from the employer, and such expenses provide a benefit both to the employee and to the employer.

Provision of a fund for the purpose of reimbursing employees for such expenditures is one way to enhance expertise and facilitate the work of the university college.

PROFESSIONAL ALLOWANCE COMMITTEE

1. Committee Chair

The committee established under 37.7.4 shall elect a chair at the first meeting of each college year. The chair shall

- ensure that eligible faculty members are informed of the annual application deadline;
- ensure that eligible faculty members are informed of the maximum allotment for the current academic year;
- receive all applications; and,
- ensure that applications for funding are processed in a timely manner.

2. Meetings

Meetings shall be held twice a year, or at the call of the Chair. One meeting will be between June 1 and June 15 to review and approve applications.

3. Responsibilities

The committee is responsible for administering the fund, reviewing and adjudicating applications based on the aims, objectives and eligibility criteria, allocating monies from the fund, setting the maximum annual amount for which reimbursement may be claimed, and developing appropriate application forms and procedures.

FUNDS & ADMINISTRATION

Each year the Professional Allowance Committee shall establish and publish the maximum allowable amount for which employees may claim reimbursement. The committee shall attempt to establish the largest possible maximum allowable claim to allow for an equitable distribution and shall base its decision on the amount of money in the fund after the previous year's reimbursements have been made and on the estimated number of employees eligible to claim reimbursement.

ELIGIBLE EXPENSES

Eligible employees may claim reimbursement, up to the maximum established by the committee, for employment related expenses that meet the following criteria:

- The expenses must be for the purposes of satisfying the employee's contractual obligation to maintain competence and currency in his or her areas of specialization or employment classification.
- Expenses must be incurred between May 16 of one year and May 15 of the following year (the application year).
- The expenses cannot be of the type for which reimbursement is otherwise available from Travel Allowances (Article 37), Professional Development (Article 22), or the Grants-In-Aid Fund (Article 37).
- Allowable expenses include, but are not limited to, professional dues (see also 37.7.6), subscriptions to scholarly journals, books, computer software, and computer or other equipment.

APPLICATIONS FOR REIMBURSEMENT

Disbursement of the fund will be made after the end of each college year (June 30). Claims may be submitted at any time up to May 31. All requests for reimbursement must include relevant receipts, dated within the college year. Late requests for reimbursement, or requests for reimbursement for expenses incurred outside the college year will not be considered.

In the event that there is not enough money in the fund to satisfy all eligible claims, the maximum eligible amount will be decreased to accommodate all of the eligible claims.