

PROFESSIONAL DEVELOPMENT FUND – ACADEMIC EMPLOYEES

Section:	Human Resources (HR)
Subject:	Employee Development and Recognition
Legislation:	
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APPROVED: _____**President and CEO****POLICY**

The policy of the Board of Governors is to provide and support, within resource limitations, employee knowledge and skills development activities.

PROCEDURE**GOVERNING PRINCIPLES**

1. The Professional Development Fund as defined by the Board of Governors of SAIT and the SAIT Academic Faculty Association (SAFA) Collective Agreement is designed to support academic employees in meeting their professional responsibilities.
2. Eligible academic employees are provided with a maximum of \$800 on a 24-month basis (inclusive of any taxes) as identified in the Collective Agreement, and a maximum of \$800 on a 24-month basis (inclusive of any taxes) funded by the vice president, academic, for individual professional development.
3. Commencement of the 24-month period is determined by the academic employee's start date as outlined in the Professional Development section of the Collective Agreement.
4. To access professional development funds, a documented professional development plan must be in place for the academic employee and their leader. This plan should be in

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writing and detail the employee's learning and development objectives as mutually discussed with their leader. Schools and departments may have specific requirements for professional development plans, or they may opt to utilize the [recommended templates and resources](#) as provided by the Human Resources department.

5. Time requested to complete professional development activities is subject to operational requirements and requires approval from the dean, director or designated authority.
6. Professional development funds may be utilized in conjunction with other SAIT funding for the same purpose or activity. Pre-approval, through the [Academic Division Professional Development and Travel Request Form](#), will be required if other SAIT funding is requested in conjunction with the professional development request.
7. Academic employees may not transfer their unused professional development funds to other academic employees or other SAIT employees.
8. Pursuant to Canada Revenue Agency (CRA) regulations, this fund may be a taxable benefit.
9. Unused funds are forfeited.

PROCEDURE

A. Priorities

1. Each application for professional development, whether at the school/department or institute level, shall be assessed based on:
 - a) Benefit to SAIT.
 - b) Benefit to the employee in the performance of their job function.
 - c) Benefit to the school/department and/or program.

B. Expense Criteria

1. The academic employee plans and discusses professional development, and the resources required to progress their development, with their leader. This is documented in a professional development plan, as per Governing Principle 4 of this procedure.

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2. The academic employee's dean, director or designate pre-approves all professional development expenditures which exceed the value of the employee's academic staff professional development funding allocation.
3. Professional development funds can be used to purchase eligible expenditures as outlined in Schedule A - Professional Development Expenditures Eligible for Reimbursement, an associated document to this procedure.
4. The academic employee's professional development request should take into consideration:
 - a) Degree of relevance to the currently assigned job, task or function with special emphasis on the knowledge or skills deemed essential for job performance which are identified through the performance planning process.
 - b) Degree of relevance to reasonably predictable future job, task or work function.
 - c) Immediacy and frequency of the application of the skill or knowledge concerned.

C. Unused Funds

1. Unused funds remaining as of June 30th of the second half of the 24-month period are forfeited.

D. Claiming Expenses

1. Refer to procedure [FN.11.1.1 Expenses](#) for out-of-pocket expense claim submission requirements, and to procedure [FN.7.1.4 SAIT Credit Card](#) for credit card expense submission requirements. Note that expense claim reimbursements cannot be processed through petty cash.
2. Expenses related to online subscriptions and software licenses are prohibited on the SAIT Credit Card. In the case of professional development, eligible expenses for online subscriptions and software licenses must be submitted for reimbursement through an expense claim in accordance with procedure [FN.11.1.1 Expenses](#).
3. Expense submissions which exceed the balance of the employee's academic staff professional development fund allocation, must be pre-approved by the employee's dean, director or designate. Failure to obtain this pre-approval may result in the denial of the claim or necessitate reimbursement of the expense.

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4. Professional development fund expenses which are submitted without a documented development plan in place, and/or which are not aligned with Section B. Priorities, and/or which are not in alignment with Schedule A of this procedure, will be declined by the academic employee's expense approver.
5. Reimbursement to SAIT will be required; as deemed necessary and as identified by either the employee's expense approver or the Finance department. The process for reimbursement of credit card expenses is outlined in [FN.7.1.4 Schedule A – Credit Card Operating Manual](#).

E. Appeal Process

1. Expense submissions which are declined can be appealed.
2. The academic employee must initiate the appeal process within 5 business days of either the declined expense claim, or upon notice from their approver that a credit card expense is not eligible and requires reimbursement.
3. The [Professional Development Expense Appeal form](#), located on SAITNOW, is submitted to the Academic employee PD Audit Committee, "the Committee" for review.
4. The Committee will be chaired by the AVP, Human Resources or designate and will consist of two SAIT managers or leaders from departments unrelated to the academic employee. The chair will convene a meeting of the Committee to review the declined expense within 10 business days of receiving the appeal.
5. The Committee will consider:
 - Alignment with institutional guidelines
 - Nature of the expenditure
 - Relevance to the academic employee's professional development
 - The justification for declining the claim
6. The Committee will decide to either uphold or overturn the expense approver's decision.
7. The Committee's decision will be communicated in writing to the academic staff member, to the expense approver, and the employee's leader (if different from the expense approver) within 5 business days following the review.

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8. The Committee's decision is final and binding.
9. If the appeal is declined and the decision of the expense approver is upheld, the expense claim will not be processed. In the case of credit card expenses, reimbursement to SAIT will be required.

ASSOCIATED DOCUMENTS

Schedule A [Professional Development Expenditures Eligible for Reimbursement](#)
Schedule B [Hardware and Software Purchase and Support Guidelines](#)

POLICY/PROCEDURE REFERENCE

HR.2.2 [Professional Development policy](#)
HR.2.2.1 [Institutional Professional Development procedure](#)
HR.2.2.3 [Professional Credential Enhancement procedure](#)