

MEMORANDUM

TO: CUPE Local 5555 Members

FROM: Marga Koetje
Employee and
Labour Relations Consultant

Laurie Lucciola
CUPE Local 5555
Education and Conference Chair

DATE: September 16, 2015

RE: CUPE Staff Improvement Fund Guidelines 2015-2016

As referenced in Article 20.12 of the CUPE Collective Agreement, the Kawartha Pine Ridge District School Board and CUPE Local 5555 support and encourage employees who wish to acquire or upgrade the education and training necessary to improve their job-related skills and/or to prepare for career-related promotional opportunities. As an incentive to pursue job-related or career-related education, the CUPE Staff Improvement Fund provides financial support for approved educational activities on a reimbursement basis. Both *permanent* and *casual* CUPE members may apply to access this fund as outlined below.

Fund Administration Guidelines:

1. Funding is for 100% REIMBURSEMENT up to a maximum of \$250.00 of approved registration.
2. Employees may make multiple applications to the fund each school year until a **maximum reimbursement of \$250.00** is reached. All receipts must be dated within the school year of the claim.
3. **As this fund is limited, approval is granted in order of receipt until the fund is depleted. There will be no carryover of applications to subsequent years. Staff are cautioned that submission of an application does not ensure approval and available funds should not be considered guaranteed. *Proof of course completion or workshop/seminar attendance may be required.***
4. Applications are accepted for reimbursement of costs associated with **job-related or career-related** courses, seminars, conferences and workshops as categorized below:

Job-Related

- i) directly supports or improves skills required for current job assignments, duties, or responsibilities; or
- ii) directly supports a current or required professional certification or designation.

Career-Related

- i) directly prepares employees for advancement to another classification within the Board;
- ii) directly develops the administrative or management capacity of employees; or
- iii) course work necessary to obtain a University or College degree to qualify them for job opportunities within the Board.

Exclusions and Limitations

- i) Job-related or career-related lectures, meetings, conferences and other opportunities which would normally be supported through school or department budgets as professional development for employees.
 - ii) In no event will credit or non-credit recreation, hobby or personal interest courses of study be eligible for reimbursement under this program.
5. The CUPE Staff Improvement fund will reimburse you, **within the \$250 maximum**, for course, workshop or seminar registration fees only.
- Note: Resource/learning materials, textbooks, replacement costs, accommodation, meals, and mileage fees will not be covered.**
6. Normal Board protocols apply in respect to approval for absence during a school day (i.e. pre-approval from the principal or supervisor).
7. The Board accepts no liability for any tax or tax related issues and will not issue "T2200" forms (as costs are not related to conditions of employment). Please note that Revenue Canada¹ advises that amounts reimbursed through this process for courses taken may not be submitted as educational expenses on annual income tax returns.
8. Where there is no question that the application is an appropriate use of these funds, Joanne Gillam, HR Specialist – Employee and Labour Relations will process the application. Where there is question, the co-chairs of the CUPE Staff Improvement Fund Committee will jointly approve the application. Where the co-chairs do not agree on the approval of an application, the larger committee will convene to make the decision.
9. A yearly summary of the fund activities will be provided to the CUPE Staff Improvement Fund Committee.

Application Procedure

1. Employees will complete an application form (Appendix A) for each course or workshop for which reimbursement is requested. Copies of the program outline, dates of the course/workshop and cost information must be submitted with the application.
2. Employees must provide **original** official standard receipts such as invoices, cash register receipts, credit card, etc. (receipts will be returned upon request).
3. If the course or workshop is scheduled on a normal work day for the employee, the absence will need to be created in Smartfind. Your supervisor/principal will need to approve this absence.
4. Submit all documents to Joanne Gillam, HR Specialist – Employee and Labour Relations in Human Resources. Please retain a personal copy of all submissions for your own records.

¹For more details reference the Canada Revenue Agency website at www.cra-arc.gc.ca

Reimbursement Procedure

1. Once the application has been received, employees will be notified if additional information is required or if the application does not fit within the guidelines.
2. The Board will reimburse the employee via an electronic funds transfer to the bank account on file with Payroll. You will be notified via an email from Finance that the funds are being deposited.

For further information, please contact:

Joanne Gillam, HR Specialist – Employee and Labour Relations at the Education Centre
705-742-9773 or 1-877-741-4577, extension 2398 or by email to: Joanne_Gillam@kprdsb.ca

or

CUPE Local 5555 office at 905-623-5356 or 1-855-737-5356



Marga Koetje
Employee and Labour Relations Consultant



Laurie Lucciola
CUPE Local 5555
Education and Conference Chair





Date Received:
(For use by Human Resources)

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD/CUPE 5555

**CUPE STAFF IMPROVEMENT FUND
APPLICATION FORM - 2015-2016**

A. Employee Information

Applicant's Name (please print): _____ Employee ID # _____

Work site: _____

Position: _____

B. Course/Workshop/Seminar Information

Course/Workshop/Seminar Name	
Please provide job-related or career-related justification (attach current program information and/or fee schedule)	

C. Course/Workshop/Seminar Dates

D. Expenses Submitted for Reimbursement (original receipts required):

GL # 34 317 6 855 619	Amount Requested	Approved	Not Approved
Course/Workshop/Seminar Conference Fees			
TOTAL			

Applicant's Signature: _____ Date: _____

Note: Incomplete forms will be returned and must be re-submitted. You must submit original receipts with your application. If you would like your original receipts to be returned, please check here

Signature: _____ Co-Chair's Signature (if required) _____
HR Specialist – Support Staff

Date: _____ Date: _____

Questions? For further information, please contact:

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