

# MEMORANDUM

**TO:** CUPE Local 5555 Members

**FROM:** Lindsay Flood  
Employee and  
Labour Relations Consultant

Anne Postill  
CUPE Local 5555  
Recording Secretary

**DATE:** September 24, 2018

**RE:** CUPE Staff Improvement Fund Guidelines 2018-2019

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As referenced in Article 21.11 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 \$500.00 of approved registration.
2. Employees may make multiple applications to the fund each school year until a **maximum reimbursement of \$500.00** 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 will be required prior to reimbursement.***
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 \$500 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 Canada<sup>1</sup> 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, Lindsay Flood, Employee and Labour Relations Consultant - Human Resources, 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 ATE EasyConnect. Your supervisor/principal will need to approve this absence.
4. Submit all documents to Lindsay Flood, Employee and Labour Relations Consultant in Human Resources. Please retain a personal copy of all submissions for your own records.

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<sup>1</sup>For more details reference the Canada Revenue Agency website at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)



Date Received:  
(For use by Human Resources)

**KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD/CUPE 5555**

**CUPE STAFF IMPROVEMENT FUND  
APPLICATION FORM - 2018-2019**

**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 6 857 619	Amount Requested	Approved	Not Approved
Course/Workshop/Seminar Conference Fees			
<b>TOTAL</b>			

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 – Support Staff

Date: \_\_\_\_\_ Date: \_\_\_\_\_

**Please submit your completed application, original receipts and other required documentation via the internal courier to: Lindsay Flood, Employee and Labour Relations Consultant, Human Resources, Education Centre**

**Questions?** Please contact:

- Lindsay Flood, Employee & Labour Relations Consultant, 705-742-9773 Ext. 2239, [lindsay\\_flood@kprdsb.ca](mailto:lindsay_flood@kprdsb.ca)
- Ann Postill, CUPE Local 5555 office at 905-623-5356 or 1-855-737-5356, [secretary@cupe5555.ca](mailto:secretary@cupe5555.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:

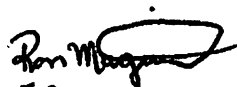
Lindsay Flood, Employee and Labour Relations Consultant, Human Resources, at the Education Centre 705-742-9773 or 1-877-741-4577, extension 2239 or by email to: [lindsay\\_flood@kprdsb.ca](mailto:lindsay_flood@kprdsb.ca)

or

Ann Postill, Recording Secretary, CUPE Local 5555 office at 905-623-5356 or 1-855-737-5356 or by email to: [secretary@cupe5555.ca](mailto:secretary@cupe5555.ca)



Lindsay Flood  
Employee and Labour Relations  
Consultant



FOR:  
Anne Postill  
CUPE Local 5555  
Recording Secretary

