

CONTINUING EDUCATION PLAN ADMINISTRATION GUIDELINES

I. SPECIAL GRANTS

Disparity

To reduce the disparities of opportunity that arise in a Church as diverse as the Anglican Church of Canada (e.g. to assist with high travel costs for those account holders who live at great distance from Canadian education institutions). This grant is for an education course and not for education travel.

It is expected that

- account holders will use local education resources before considering resources at a distance
- account holders will have explored the possibility of local financial assistance
- account holders will have applied for their full credit in the CEP before applying for a special grant
- The length of time of participation in the plan will be taken into consideration in establishing the amount of a special grant.

Retraining

The purpose of this fund is to provide modest assistance to account holders in CEP who are experiencing career crisis, and who require retraining.

Grants are subject to:

- \$2,000.00 limit
- account holder must have 5 years' participation in the Plan
- funds to be used for education or training
- application must be made by the Bishop on behalf of the account holder

These grants are not available for:

- retirement planning
- resettlement

Salary Source

To enable dioceses or participating organizations to conduct educational events for employees who are account holders of the Plan (staff development days, clergy seminars, etc.)

Diocese should apply to the Administrator describing:

- nature of the program
- the approximate cost
- diocesan share of the cost
- benefits to be expected from the program, for the employer

II. SABBATICAL GRANT

A grant of up to \$3,000.00 (*) may be provided to an account holder for a period of full time study of not less than 8 weeks after 5 years' participation in the Plan.. (For a D. Min Program, the 8 weeks need not be consecutive). Application should be made to the Administrator giving:

- goals of the study
- procedure for supervision
- form of evaluation of the work
- the relationship of the sabbatical to future employment in the Church
- budget

It is expected that the employee will return to his/her job after his/her sabbatical, for a minimum of 6 months.

(*) **The amount of a sabbatical grant prior to 1999 was \$2,000.00.**

III. CESSATION OF PARTICIPATION

- a) Upon retirement or termination of employment, any expenses incurred within 3 months of the date of such termination or retirement shall not be considered eligible expenses under this plan.
- b) After retirement or termination of employment any funds remaining in an account holders account will be held for 12 months in case of a return to active employment within that time, at which time such funds will again become available to the account holder. After 12 months any account balances will be closed and reverted to the general fund.

IV. COMPUTER HARDWARE

Guidelines for Eligibility of Computer Hardware

- a) Replacements of identical types of computer hardware i.e. desktops, laptops, tablets, ipads, smart phones etc. are permitted only after 3 years from the date of purchase of initial product.

- b) Although desktops, laptops and tablets have overlapping but not identical characteristics, there are many tasks which can be done by more than one such product. If more than one type of hardware is purchased within 3 years of another type, the account holder will be asked to explain how the second product is to be used, that cannot be accomplished using the 1st product purchased.
- c) Accessories are not eligible expenses. For example, laptop cases, phone cases, toners/ink cartridges, sleeves etc are not eligible expenses.

V. FITNESS/GYM/HEALTH CLUB MEMBERSHIP (12 months and longer)

Membership may be purchased with account holder's accumulation. Membership agreement and a copy of receipt of purchase must be attached to application form.

Account holders are not permitted to use the funds to purchase:

- Short term membership (less than 12 months)
- Pay as you go fees
- Personal fitness trainer fees
- Fitness consultant fees
- Fitness/exercise equipment and sporting goods

VI. GENERAL

- a) Details and receipts are required for all expenses submitted for reimbursement. The receipt must indicate that payment was made in full.

All acceptable receipts contain all of the following:

- Vendor or business name and address
- Description and price of each item
- Total amount of purchases, including taxes and related fees
- Proof of payment
- Date of payment

- b) All claims must be submitted within 12 months of the date of receipt for reimbursement