

GUIDELINES & PROCEDURES

Introduction & Purpose

This document is a reference tool for CUPE 1260 members regarding the administration of the CUPE 1260 Wellness Fund as outlined in Article 20 (o) of the SD35/CUPE Local 1260 Collective Agreement (2022-2025). The purpose of this document is to provide guidelines for how members may spend the funds, how the funds are allocated and distributed, and how the funds will be managed.

Allocation and Distribution of Funds

CUPE 1260 Wellness Funds have been allocated through the 2022-2024 Provincial Framework Agreement through BCPSEA to individual school districts. CUPE Union Local 1260's allocation of these funds is:

- In the 2022/23 year, \$66,792 will be allocated to the fund.
 - Approximately \$105 allocated per qualifying member.
- In the 2023/24 year, \$127,657 will be allocated to the fund.
 - Approximately \$165 allocated per qualifying member.
- In the 2024/25 year and following years, \$240,586 will be allocated to the fund.

Funds for each school year will be divided equally among CUPE 1260 members who meet eligibility criteria as of July 15th of the school year – e.g.: funds for the 2022/2023 school year will be divided by the number of CUPE 1260 eligible members on July 15th, 2023.

CUPE 1260 members may “gift” a portion, up to 100%, of their funds to another eligible CUPE 1260 member, should both parties agree. A *CUPE 1260 Member-to-Member Fund Allocation Form* is to be filled out by the employee gifting the funds and is to be signed by both employees. The funds will be reallocated, and notification of the transaction will be emailed to both parties.

If a CUPE 1260 member has money remaining in their account on of the following year, the funds will be rolled over and made available to that member for that school year. Note: CUPE 1260 Wellness Funds are available to CUPE 1260 employees only during employment. Funds shall not be paid out to individuals upon leaving the employ of the district.

Guidelines for Spending the Funds

The CUPE 1260 Wellness Funds will be used exclusively to support training, technology, skills development, and wellness initiatives for all CUPE Local 1260 employees. Note: CUPE 1260 Wellness Funds are derived from public funds; therefore, expenditures are subject to provisions of FOIPPA.

1. The CUPE 1260 Wellness fund is available to employees who, on July 15th are actively working as a continuing or term employee, who have, in the current school year:
 - completed a continuing or term assignment that has a minimum duration of five (5) months, or
 - completed a term assignment and have accumulated term assignment durations that add up to a minimum of five (5) months during the current school year.
2. CUPE 1260 Wellness expenditures for spouses and children will not qualify.
3. A list of pre-approved purchases/initiatives have been included at the end of these guidelines.

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- a. Please note, if you are unsure if the item/initiative would qualify for reimbursement, it is strongly recommended to submit a Joint 1260 Wellness Fund – Pre-Approval Form to receive confirmation prior to your purchase.
4. CUPE 1260 Wellness Funds approved for educational purposes are not intended to be used during regular workdays. Exceptions will be considered by the committee on a case-by-case basis. Any education requests that take place during working hours must be approved by the employee's direct supervisor.
5. New CUPE 1260 members commencing employment on or after July 15th each year will have access to funds commencing the following school year providing, they meet the eligibility criteria listed in paragraph #1 above.

Process for CUPE 1260 Wellness Fund Reimbursement

1. The employee completes the Joint 1260 Wellness Fund – Reimbursement Application Form, attaches receipts, and emails it to the Committee for processing – 1260wellnessfund@sd35.bc.ca
 - a. If unsure submit a pre-approval form.
2. The reimbursed amount will be deposited to the employee's bank account via EFT (Electronic Fund Transfer).

Accounting and Auditing Procedures

Accounting for the Joint 1260 Wellness Committee involves keeping track of all expenditures, ensuring the expenditures are eligible for reimbursement, and resolving any discrepancies between the calculated fund total and the balance in the account. On a monthly basis, the balance in the account should equal the opening balance less any authorized payments back to members.

The fund will be overseen by Human Resources representatives and CUPE 1260 representatives, who are members of the Joint 1260 Wellness Committee. A reconciliation spreadsheet will be maintained by HR that tracks the spending of each CUPE 1260 member.

As CUPE 1260 members submit their requisition form and original receipt for reimbursement, please ensure the following:

- All fields on the form are filled in
- Authenticity – i.e.: original receipt (preferred) or copy receipt should always be submitted
- Sufficient back-up to identify the transaction date, amount and type and eligibility of the expense

SD#35 purchase cards are not to be used to pay for any wellness expenses.

The committee will conduct a review of the records of the CUPE 1260 Wellness Fund once a year.

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Pre-Approved Purchases / Initiatives

The following list includes items that have been pre-approved by the Joint 1260 Wellness Committee. This is not an exhaustive accounting of all qualifying initiatives.

Please note, if you are unsure if the item/initiative would qualify for reimbursement, it is strongly recommended to submit a Joint 1260 Wellness Fund – Pre-Approval Form to receive confirmation prior to your purchase.

- Gym memberships
- Fitness trackers (Apple watch, fitbit, etc.)
- Fitness activities (yoga classes, dance classes, golf lessons, etc.)
- Exercise equipment (elliptical, treadmill, etc.)
- Fitness gear (running shoes, hiking shoes, etc.)
- Therapeutic devices or sessions (happy light, massage gun, float therapy, etc.)
- Music-related (instruments, lessons, etc.)
- Creativity and art (art supplies, painting classes, e-readers, etc.)
- Gardening (supplies, seeds, planters, etc.)
- Nutrition (vitamins, cooking classes, naturopathic / nutritional supplements, etc.)

Some items that would NOT be covered under this fund have been listed below:

- Alcohol or Drugs (recreational, over the counter or prescription)
- Vacations (flights, hotels, etc.)
- Entertainment (concert tickets, sporting event tickets, etc.)
- High Risk Activities (skydiving, etc.)
- First Aid Supplies (bandages, tape, etc.)
- Medical and/or Cosmetic Procedures and Aesthetic Services
- Cosmetic and/or Hygiene Products
- Electronics and/or Games (i.e., TV, gaming systems, etc.)
- Furniture and/or Appliances