



## Professional Activities Fund (PAF) Guidelines and Eligibility

### PAF (Professional Activities Fund) Guidelines and Eligibility

*This document refers to PAF Guidelines and Eligibility at the School of Engineering on UBC's Okanagan campus ONLY. The intent of this document is to formalize the structure of PAF, and to outline relevant roles and responsibilities in recommending projects. In order to qualify for PAF the student(s) must 1) follow the guidelines outlined in this document and 2) fall within the eligibility criteria outlined in this document.*

#### 1 General PAF Criteria

A professional activities fee is collected to enhance professional development activities in the School of Engineering's undergraduate program. The Professional Activities Fund (PAF) is used to support projects and activities that enhance the professional development of undergraduate engineering students.

1. PAF's purpose is to support co-curricular activities and projects that lie outside, but yet are complimentary to, the engineering curriculum.
  - a) This may include: (1) core, sustainable activities, and (2) student-initiated, short-term activities (ex. student projects, student teams, and student conferences). PAF is not intended to replace university-level or school-level funding that directly supports curricular activities. Rather, it is meant to support short-term, student-initiated projects, subsidize student travel, and support sustainable activities that benefit the student body.
  - b) PAF does not support individual or group research initiatives. This may include: (1) Attending conferences or competitions to present research based on a) research done at the university with a Faculty member and/or b) research done at the university as part of a course.
2. PAF does not support initiatives that have already occurred. PAF will not fund applications that project "carry over", produce any personal profit\*, or intend to run a deficit. *\*Profits produced to support school clubs and/or organizations are an exception.*
3. PAF does not accept applications for previous fiscal cycles.
4. PAF applications submitted for a future fiscal cycle will be reviewed on a case by case basis. In the event where the committee is no longer active or beginning it's change-over and the application needs to be reviewed immediately, the decision will be left to the discretion of the previous committee and/or the Associate Director of Undergraduate Studies at UBC Okanagan School of Engineering. For example, PAF applications submitted in W2019-2020 or S2020 for the W2020-2021 school year and future fiscal cycle, will either be reviewed by the W2019-2020 PAF committee or by the Associate Director of Undergraduate Studies, if immediate review is required.
5. Approved applicants must sign the *Funding Acceptance Agreement* form once approved.
  - a) As per the form, applicants are responsible for submitting reimbursement claims (in line with [UBC Policy #83](#)) and a final report within 14 days of the event end-date, otherwise they forgo reimbursement.



## 2 PAF Administration and the PAF Committee

Administrative support for PAF is provided by the PAF Coordinator, Engineering students, and the Engineering Society President.

The PAF Coordinator:

- Ensures that the PAF website is up-to-date
- Attends meetings of the PAF Committee
- Notes comments on unsuccessful applications
- Maintains a database of applications and the status of each
- Communicates with the PAF Committee and with applicants
- Coordinates reimbursements to PAF recipients

The PAF Committee has been established to adjudicate student-initiated, short-term activities for funding, and is comprised of the following members:

- Associate Director, School of Engineering
- Engineering Society President
- PAF Coordinator (non-voting member)
- Academic Advisor, School of Engineering (non-voting member)

6 student representatives:

- o 1 – Year One
- o 1 – Year Two
- o 1 – Civil
- o 1 – Electrical
- o 1 – Mechanical
- o 1 – Manufacturing

### 4.1 Voting

**Ties:** In the event of a tie the Associate Director of Undergraduate Studies at the UBC Okanagan School of Engineering will exude judgement to determine the outcome of the application.

**Time-sensitive:** If the PAF application requires immediate review for reasons pertaining to purchasing travel and/or conference tickets, the PAF Committee will vote electronically to ensure its fast processing.

## 3 PAF Website

The PAF website is used to provide information on PAF, membership of the PAF Committee, PAF Guidelines and Information, criteria and procedures, and all relevant application forms. Shortly after the end of each PAF cycle, the PAF website is updated annually to list all awards and uses of PAF. The PAF website will also contain all reports submitted by successful applicants.



## 4 Eligible Applicants and Expenses

### 4.1 Student Eligibility Regulations

1. All applicants and participants must be School of Engineering undergraduate students in good standing both at the time of the application and during the period of the project itself.
2. Applications will be accepted from undergraduate students or clubs affiliated with the School of Engineering. Applications will NOT be accepted from faculty members, staff, or off-campus organizations, or from UBC Okanagan students applying on behalf of off-campus organizations.
3. Students may submit multiple applications over the course of an academic year, but subsequent applications will not be approved if original applications are outstanding (ex. receipts / boarding passes not submitted).

### 4.2 Funding Eligibility Regulations

1. Student applications MUST meet eligibility regulations as listed in Student Eligibility Regulations above.
2. Applications must support co-curricular activities and projects that lie outside, but yet are complimentary to, the engineering curriculum. No curriculum-based activities or research-based activities are eligible for funding.
3. Applications should be received at least **4 weeks prior to the event**, project, or eligible activity to enable the Committee to make a funding decision. Funding decisions will be announced soon afterward. Applicants may only submit applications for a particular event once in the academic year.

***STUDENTS WILL RECEIVE A NOTIFICATION ONCE THEIR PAF REQUEST IS MADE, AND BE UPDATED ONCE A DECISION IS REACHED.\*\****

4. Students should be aware that applications by individuals on their own behalf are rarely, if ever, funded. Greater consideration will be granted to applications that benefit the student body, directly or indirectly. Project examples of indirect benefit to students could include:
  - a) Those that establish relationships between the School of Engineering and other institutions or companies.
  - b) Those that represent the School of Engineering by giving a presentation at a conference.
  - c) Something that would result in positive media attention for the School of Engineering.
  - d) Giving a presentation at the School of Engineering to share what you have learned with other students.



6. It is expected that students will secure additional sources of funding. Additional funding solicited and secured must be noted in the completed PAF Application to support the proposal.
7. Please note the following restrictions on funding:
  - a) Meal costs can be eligible expenses, but cannot exceed standard UBC per diem rates.
  - b) No alcoholic beverages will be reimbursed through PAF.
  - c) Where vehicle mileage is claimed, standard UBC rates will apply (refer to UBC Policy 83).
8. Travel, conference, and field trip funding should be allocated based on the region of travel with the following limits as guidelines.
  - a) \$200/student within 150kms
  - b) \$500/student within 600kms
  - c) \$1000/student within North America / International
9. Large group applications (including single applicants belonging to a larger group) and conference funding will be considered on a case-by-case basis.
10. **PAF Funding shall not exceed 75% of a trip's total budget.**
11. Self-funding and/ or out-servicing is encouraged for all initiatives, especially larger ones.

## 5 Criteria for Application Review and Awarding of Funding

Applications submitted will be evaluated using the following criteria:

1. Quality and rationale of PAF Application
2. Thoroughness, clarity and transparency of budget. Clear efforts in securing or attempting to secure outside funding via sponsorships, donations, etc.
3. Impact of project on UBC student learning. Ex. How many UBC students are involved directly and indirectly? How engaged are students in learning?
4. Articulation of student/team/group's role in the School, including purpose, history, achievements to date, and short/long-term goals.

Based on discussion of the PAF Committee, each application will receive one of the following ratings: Approved, Approved with Conditions, or Denied.

## 6 Notification

All successful applicants will be issued an email regarding the approval of their application and must meet with the PAF coordinator in person or virtually, to receive their funding letter with the funding amount. Emails to unsuccessful applicants will also be issued indicating the reasons why the application was not successful. If the application is received by the deadline listed in the chart in 'Eligible Applicants and



Criteria' Section #4, the applicant will be notified before the date listed in the Approval Notification column.

It is the applicant's responsibility to ensure that the email contact information listed on their application is current.

## 7 When Funding is Approved

### 7.1 Meeting with PAF Coordinator

Successful applicants are required to communicate via email, with the PAF Coordinator immediately following PAF funding approval email. Additionally, an in-person/virtual meeting may also be required depending on the circumstances of the application.

The following topics will be discussed:

- Travel Arrangements
- Consent Forms
- Expense Reporting
- Submission of Receipts / Boarding Passes
- *Funding Acceptance Agreement form*

### 7.2 Travel Arrangement Regulations

Through use of an online, self-serve booking platform, PAF can purchase flights for student travel, if informed within 8 weeks of approval notification. The following process will be followed.

1. The students will contact the PAF Coordinator indicating they wish to book travel.
2. The PAF Coordinator will provide instructions regarding the self-serve booking platform.
3. The PAF Coordinator will approve the appropriate approved flights, and pay for the booking.

**For group travel, (10 or more) the PAF Coordinator will connect the student group with a specialized travel agent for booking support.**

If students purchase flights in advance of an approved event, and those flights fall within the amount approved in the PAF Application, a student will be reimbursed post- travel, by following the reimbursement process outlined in this document and the PAF Approval Letter that is issued following the successful approval of an application.

It is the student's responsibility to request the appropriate amount of funds in consideration of a) the future date of the event b) the application deadline and c) the approval notification date. Upon approval notification, students should book flights within a reasonable time-frame to avoid fare increases. **If fare increases occur, PAF will not provide more funds to cover these costs.**

### 7.4 Reimbursement Regulations

**IMPORTANT:** As per the *Funding Acceptance Agreement* form, students forego reimbursement if their reimbursement package and final event report are NOT submitted within 14 days of the event end date.



## Reimbursement Claims

All payment reimbursements are receipt-based and must be accompanied by an original receipt and a properly completed expense claim form (found [here](#)). Proof of payment in the form of credit card or bank statements are required.

Please note that if travel is involved, all receipts and travel documents (ex. boarding passes) for each application are required before reimbursements are issued. Please refer to [UBC's Travel Policy #83](#) for further information.

Students must follow the process outlined below when putting together your reimbursement package:

1. Completely fill out the expense claim form, linked above.
2. Include all PDF copies of all receipts and any credit card statements.
3. Include a copy of this PAF Approval letter with each reimbursement package submitted.
4. Submit all reimbursement packages to the PAF Coordinator via email ([grant.topor@ubc.ca](mailto:grant.topor@ubc.ca)), within 14 days of the project/travel completion as per the *Funding Acceptance Agreement* form otherwise, the student forgoes reimbursement.

## Final Event Report

As per the *Funding Acceptance Agreement* form, students must submit a final report that is a minimum of 500 words and includes a) a summary of the event/project/conference/competition/field trip that they attended, b) how this event/project/conference/competition/field trip enhanced their professional development, and c) a piece of visual media from the event (ie. Photograph or video).

This report must be [submitted online here](#).

## 7.5 Payment Processing Regulations

Processing times vary slightly depending on method of reimbursement (cheque vs. direct deposit). UBC uses Direct Deposit to reimburse employees. Cheques are used for all other reimbursements, and are issued from the Vancouver campus.

From the time a reimbursement package is submitted and verified complete, the School of Engineering will process within 30 business days. From there, UBC Finance will be responsible for reimbursement. Their processing times can be [found here](#). Credit card statements are not always needed, but should always be made available upon request by UBC Finance. UBC Finance can ask for credit card statements at any time for any reimbursement if they require clarification on an expense (this applies to faculty, staff, and students).



To apply, fill out a [PAF application online](#).

Please direct all PAF-related questions to PAF Coordinator: Grant Topor at [grant.topor@ubc.ca](mailto:grant.topor@ubc.ca)