

Title: Learning and Development Policy		Number: 8014
Reference: Administrative Committee – procedures approved – March 16, 2011	Adopted by City Council: May 3, 2011	Supersedes: Policy Adopted August 20, 1990
Prepared by: HUMAN RESOURCES DEPARTMENT		

STATEMENT:

Superior public service begins with competent and engaged staff. Establishing an organizational expectation of continuous learning and then actively supporting staff in their development efforts is a cornerstone to fulfilling Council's *Organizational Strength* policy objective. It is also a key component of attracting and retaining competent employees plus succession planning for the future. The purpose of this policy is to clearly set out the City's values, expectations and commitments with respect to staff learning and development.

PRINCIPLES:

1. The City considers staff learning and development an "investment" directly contributing to the above Policy Statement.
2. Procedures that support this Policy shall encourage decisions throughout the organization that achieve a "return" on the investments made in staff learning and development.
3. Guided by this Policy and Procedures, Management shall set clear expectations to employees on positional competency requirements, ongoing personal development objectives and shared responsibilities to contribute to the development of other staff.
4. Considering those expectations, employees shall have the responsibility to be self-directed and demonstrate personal commitment in their own development.
5. Organizational support of learning and development activities shall be focused upon two key areas: building capacity of individuals and teams in their current roles – and - growing competence of individuals for potential future roles.
6. As training is only one strategy to support staff development, Executive shall adopt Procedures that encourage and support a variety of "action learning" strategies.
7. Fair access to learning and development opportunities shall be afforded to all employees. This does not mean universal nor equal access. Unless otherwise directed by collective agreements or City Council, Management shall be responsible to determine support for staff development on a case by case basis relative to the established Procedures, organizational needs, established budgets and an individual's demonstrated performance and potential.

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ROLE OF COUNCIL

Receive, review and adopt any recommended changes to the Staff Learning and Development Policy.

Address any requests from Council's direct reports for Career Development assistance.

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1. DEFINITIONS

- 1.01 **Action Learning** – essentially learning-by-doing and teaching through examples and repetitions, usually done in conjunction with others, particularly suitable for adults to guide future action and improve performance. The method stands in contrast with the traditional training that focuses on the presentation of knowledge and skills.
- 1.02 **Competency** – knowledge, skills, traits, motives and values required to satisfactorily carry out a role.
- 1.03 **Continuous Learning** – is the ability to ‘learn to learn’ and the expectation that members of an organization will constantly strive to grow their competence.
- 1.04 **Development** – refers to skills and knowledge attained for both current roles and potential career advancement, encompassing all types of learning opportunities ranging from very structured and formal (e.g. college degrees) to informal and learn-by-doing (e.g. on the job training).
- 1.05 **Corporate Training Reserve** – Corporate funding managed by HR and set aside for Organizational and Career categories of learning and development.
- 1.06 **Leadership** - is about people; influencing a group of people to achieve common goals by listening, visioning, inspiring, persuading, building relationships and establishing team work.
- 1.07 **Learning** – process of acquiring new understanding, skills, knowledge, behaviours, values, etc.
- 1.08 **Management** - is about things or activities; facilitating efficient and effective production of useful outcomes from a system through planning, budgeting, staffing, directing, coordinating, problem solving and decision-making.
- 1.09 **Training** – subset of Learning, normally in current job and referring to the acquisition of pertinent knowledge and skills as a result of the teaching by others.
- 1.10 **Succession Planning** – is a process for identifying and developing internal staff with the potential to fill key leadership positions thereby increasing the availability of experienced and competent employees that are prepared to compete for these roles as they become available.
- 1.11 **Workforce Planning** – ensuring that an organization has suitable access to talent to sustain future business operations including considering all potential sources (employment, contracting out, partnerships, altering service levels to modify the types of talent required, etc.).

2. RESPONSIBILITIES

- 2.01 Employees to:
 - (a) Work together with their direct supervisor to ensure a suitable Personal Development Plan is developed, carried out and reviewed annually.
 - (b) Demonstrate personal commitment in all learning and development activities as required under this set of procedures.
 - (c) Strive to provide a return on the City’s investment in their learning and development by integrating new skills into their roles and by sharing learning with others.

This policy is subject to any specific provision of *The Municipal Government Act* or other relevant legislation or Union agreement.

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- (d) Successfully complete the requirements of all learning and development initiatives (employees shall be responsible for their own time and expenses if subsequent attempts are required to reach successful completion).

2.02 Department Management to:

- (a) Ensure that departmental employees are familiar with this Policy and Procedures.
- (b) Work together with employees to ensure suitable Personal Development Plans are developed, carried out and reviewed annually for each employee.
- (c) Make decisions, forward recommendations and/or provide learning and development supports to employees as called for under this set of procedures.
- (d) Ensure a return on the City's investment in employee learning and development by facilitating opportunities for employees to put new learning into practice and then following up on progress.
- (e) Ensure necessary Technical and Legislated learning and development opportunities are provided to employees.
- (f) Communicate with Executive and HR on Organizational and Career learning and development opportunities that would benefit their employees.

2.03 Executive to:

- (a) Carry out similar roles as expected of Department Management for all direct reports.
- (b) With HR support, periodically review these Procedures and recommend Policy changes to City Council.
- (c) With HR support, annually review corporate expectations for Organizational learning and development including competencies and accountabilities for leaders / managers.
- (d) With HR support, CAO & Commissioners are to approve (for their divisional employees) all external programs related to both Organizational Development and Career Development requests valued at over \$5,000.
- (e) Ensure the Corporate Training Reserve is adequately funded and that organizational programs are prioritized within budget parameters.
- (f) Keep City Council aware of learning and development strategies employed to meet City Council's Organizational Strength policy objectives.
- (g) CAO only may approve exceptions to these Procedures.

2.04 Human Resources Department to:

- (a) Act as a resource to employees, department management and executive in interpreting and applying all aspects of these Procedures.
- (b) Consult on, coordinate and (where most effective / efficient) deliver Organizational learning and development strategies.
- (c) Create and retain Learning Contracts (where required).
- (d) Manage the Corporate Training Budget.
- (e) Provide information and consultation necessary for Executive to carry out its role including annual review of all Organizational and Career learning and development needs and strategies.

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3. PROCEDURES

3.01 Personal Development Plans

- (a) All learning and development activities shall originate from an agreed upon set of needs/priorities between each employee and their supervisor. Needs/priorities shall be focused on one or both of the following:
- (1) Improving employee competence and performance in current roles
 - (2) Developing employee competence and potential for future roles (work force planning & succession planning)
- (b) Such discussions shall occur no less frequently than annually and, ideally, be documented in the “Personal Development Plan” section of the employee’s annual Achievement Plan and Review Document (where utilized). *Refer to the Achievement Planning and Review process documentation on the Intranet.*

3.02 Required Competencies

- (a) Competencies required for a particular position should drive learning and developments activities. These can normally be referenced from several sources including:
- (1) Position (job) descriptions and line-of-progression plans (where they exist as prepared by departments).
 - (2) Work Style Patterns profile for a position.
 - (3) Behaviours valued at the CoMH (i.e. see Commitment to a Constructive Culture).
 - (4) Any competency model or framework that is endorsed by the City for a particular role or position.

3.03 Categories of Learning and Development

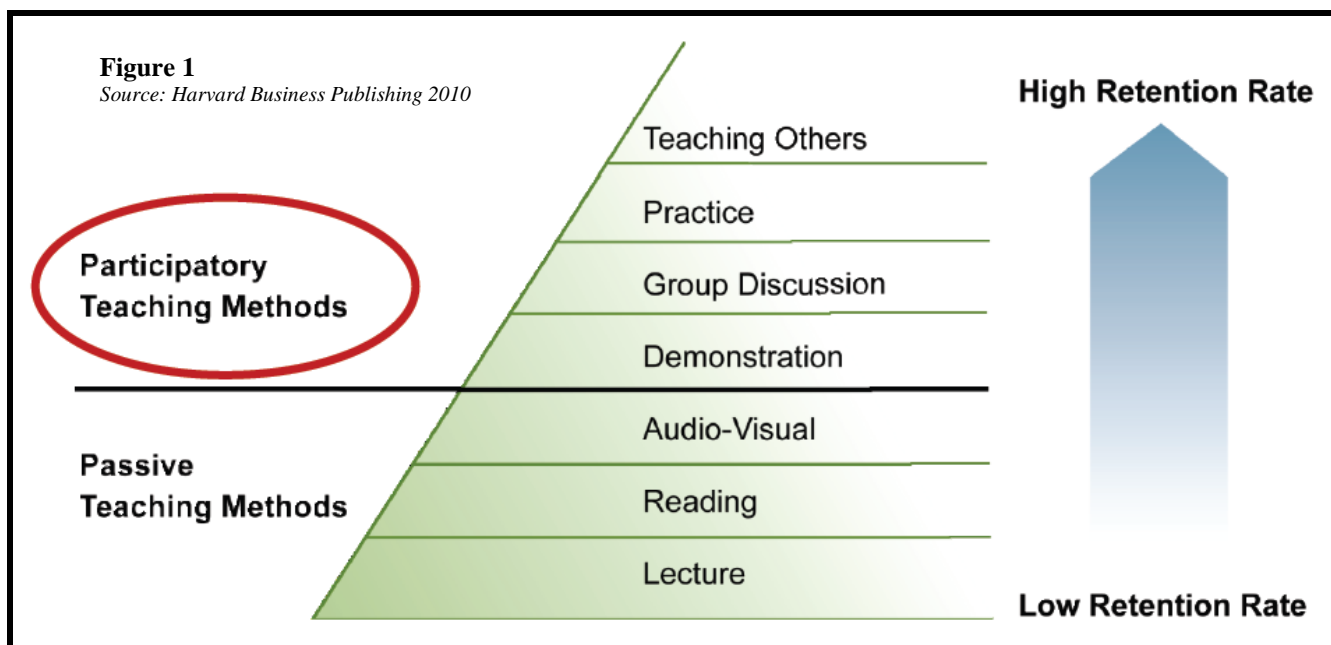
- (a) For the purpose of this Policy, learning and development categories will be set out as follows:
- (1) **Technical** – specific to maintaining or improving technical competence and/or understanding of operating procedures within current position or for typical line-of-progression with departmental operations (e.g. equipment operation).
 - (2) **Legislated** – ongoing requirements to comply with standards set by professional associations (e.g. Professional Engineers or Certified Management Accountant) and/or government regulations (e.g. *Occ. Health & Safety or Environment Acts*).
 - (3) **Organizational** – related to City’s core values and organizational objectives common across all departments / positions (e.g. Leadership and Management Development).
 - (4) **Career** – related to employee career aspirations and organizational succession planning requirements (e.g. post-secondary diplomas / degrees, executive development and local government certificate programs).

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- (b) Details regarding such items as eligibility, approvals, cost sharing, types of learning strategies, etc. are set out in **Schedule A**.
- (c) Guidelines for establishing corporate support of Career Development initiatives are set out in **Schedule B**.
- (d) Considerations intended to assist an employee in creating an effective Career Development proposal are provided in **Schedule C**.
- (e) Apprenticeship programs are outlined separately in applicable Collective Agreements.

3.04 Learning and Development Strategies

- (a) The City will encourage and support a variety of learning and development strategies within the established categories. In particular, all managers and staff should be aware that best adult learning practices are based upon action learning principles and participatory teaching methods. **See Figure 1**.
- (b) In situations where initial learning occurs through passive teaching methods, managers and staff are encouraged to work together to create action learning opportunities whereby skills learned are shared, practiced and ultimately retained.
- (c) HR will strive to engrain best adult learning practices in all learning and development strategies that it maintains responsibility to offer and/or consult upon.
- (d) HR will ensure Organizational learning and development opportunities and/or requirements are clearly communicated across the organization to all employees and shall be available to consult on Career related options.
- (e) Department Management will maintain responsibility to ensure its employees meet Technical and Legislated learning and development requirements.



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3.05 Continuing Education Units / Hours of Learning

- (a) The City will support employees in their efforts to attain the necessary continuing education units (CEU's) as per the employee's Professional or Legislated obligations related to the position currently held or when clear value to the organization exists.
- (b) The City expects that all employees who hold a leadership / management position with direct supervisory responsibilities over others will achieve no less than 30 hours of leadership and/or management learning and development each year through either Organizational or Career Development initiatives. This 30 hour commitment can be fulfilled through a combination of "skill acquisition" and "skill application" strategies – *refer to the Achievement Planning and Review process documentation on the Intranet.*

3.06 Learning Contract

- (a) A learning contract is required when:
 - 1) the City's investment in one individual employee's learning and development exceeds \$5,000 in any one year and/or exceeds \$10,000 across three years.
 - 2) the City's investment relates specifically to the Career Development Category or is driven by the employee's request for financial assistance in the other 3 categories (rather than by corporate requirement).
- (b) The learning contract will set out the responsibilities of both the City and the employee including items such as time off from work, payment of out-of-pocket costs, expectations for program completion and return to work commitments. See **Schedule D** for sample.
- (c) All learning contracts must be developed in conjunction with HR, approved by Executive and retained in the employee's personnel file.
- (d) Return to work commitments:

Amount of City Investment	Required Return to Work Commitment of Employee
\$5,000 - \$9,999	12 months after successful program completion is confirmed
\$10,000 - \$19,999	24 months ----- " -----
> \$20,000	36 months ----- " -----

- (e) Repayment obligations when return to work commitment not fulfilled:

Total City Investment \$ X	# of months short of fulfilling RTW commitment # of months of original RTW commitment
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3.07 Employee Education Leaves of Absence

- (a) Formal application shall be made in accordance with the HR procedures for applying for any leave of absence.
- (b) Due to the rarity of such requests, any application made will be reviewed on its individual merits with due consideration to the City's return on investment and only with CAO approval.

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3.08 Team Development

- (a) Refer specifically to HR Protocol - Departmental Access to Corporate Training and Development Funds. **See Schedule F.**

3.09 Reimbursement of Eligible Career Development Costs

- (a) It is generally expected that the employee will self-fund the up-front cost for any career development initiative and that the City will reimburse the agreed upon portion of those costs when proof of successful course / module completion is provided.
- (b) Where upfront costs of the course / module exceed \$1000, then the employee may request to have 50% of the City's agreed upon portion funded up front with the final 50% payable at successful completion of the course / module.
- (c) Requests for reimbursement shall be made by submitting a Career Development Reimbursement Form. **See Schedule E.**

4. ATTACHMENTS

- Schedule A – Categories of Learning and Development
- Schedule B – Guidelines for Corporate Support (Dollars & Time)
- Schedule C – Creating an Effective Career Development Proposal
- Schedule D -- Sample Learning Contract
- Schedule E – Career Development Reimbursement Form
- Schedule F – Dep't Access to Corporate Training and Development Funds (HR Protocol)

Schedule A – Categories of Learning & Development

	<i>Technical</i>	<i>Legislated</i>	<i>Organizational</i>	<i>Career</i>
Dev't related to: (examples within this category)	<ul style="list-style-type: none"> o <i>Current position or line-of-progression within dep't operations</i> o Technical competence re: position duties o operating procedures o trades apprenticeship 	<ul style="list-style-type: none"> o <i>Mandated from Professional Associations or Provincial Authorities</i> o Comply with prof. certification req'ts: e.g. PEng, CMA, CHRP, etc. o Comply with gov't regulations: e.g. Safety Training under OH&S Act 	<ul style="list-style-type: none"> o <i>CoMH core values and organizational objectives common to all positions</i> o Leadership & Mgmt dev't o Core competencies: e.g. communication skills and customer service o Team development 	<ul style="list-style-type: none"> o <i>Personal aspirations and organizational succession planning requirements</i> o Executive dev't o Academic upgrading o Leadership & mgmt dev't programs including those specific to local gov't
Typical types of Learning Strategies:	<ul style="list-style-type: none"> o Conferences, seminars & networking meetings o Short courses or workshops o Certificate programs o On-the-job training, peer mentoring received from others 	<ul style="list-style-type: none"> o Conferences, seminars & networking meetings o Short courses or workshops o Certificate programs o Contributions to profession; serve as peer mentor to others 	<ul style="list-style-type: none"> o Personal leadership program or individual courses o Work Group Leader programs / courses o Mgmt training re: corp. expectations, policies, procedures o Team building 	<ul style="list-style-type: none"> o Executive MBA, CMA, etc. o university degrees & college diplomas, certificates o Certificate in Municipal mgmt & Leadership; Certified Local Gov't Manager
Competency / Dev't Standards set by:	<ul style="list-style-type: none"> o Dep't Management 	<ul style="list-style-type: none"> o Professional Assoc. or Provincial Legislative Authority 	<ul style="list-style-type: none"> o CoMH Executive with input from HR 	<ul style="list-style-type: none"> o Academic Institution
Who is eligible:	<ul style="list-style-type: none"> o Permanent Employees o Contract and temporary employees only when clear, direct benefit to organization or legislated requirement exists as determined by Dep't Management o <u>Specifically for Work Group Leader or Management Learning & Dev't:</u> Only permanent employees currently in supervisory roles or who have satisfactory performance and demonstrate potential for promotion to a supervisory role 			<ul style="list-style-type: none"> o Perm. employees who formally apply under this policy, have satisfactory performance and demonstrate potential for promotion to a position requiring the sought-after academic credential
Approval by:	<ul style="list-style-type: none"> o Dep't Management (subject to available dep't budget) 		<ul style="list-style-type: none"> o Dep't Mgmt for established internal programs and external programs costing <\$5,000 o Executive for any external programs >\$5,000 o Requests for Corporate Training Funds subject to consultation and support from HR 	
Approval Criteria:	<ul style="list-style-type: none"> o Necessary to meet Legislated, Professional, Operational or Collective Agreement requirement? Or, required hours for Leadership/Management Dev't? o Clearly fits with employee's Personal Dev't Plan? Organizational Succession Plan? o Clear benefit to both organization and employee? o Less costly / disruptive alternatives available? o Employee potential for advancement? o Employee has proven ability to incorporate new learning and share with others? 			<ul style="list-style-type: none"> o Same criteria – plus - a formal Learning Contract may also be required. See Policy Clause 3.06 and Schedule 'C'.
Cost Sharing:	<ul style="list-style-type: none"> o Opportunities provided in-house –or- 100% of related expenses (registration, materials, travel, accommodation, meals) covered by City as per Personal Expense Policy #0107 o Employee paid regular wages unless applicable collective agreement overrules 			<ul style="list-style-type: none"> o See Schedule 'B' for guidance on determining corporate financial support
Funding Source:	<ul style="list-style-type: none"> o 100% from Dep't operating budget 		<ul style="list-style-type: none"> o Internal Programs – fully funded from Corp. Training Fund (Reserve) o External Programs - first \$2000 of City's portion (per separate program) comes from Dep't operating budget and balance from Corp. Training Fund (Reserve) 	

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Schedule B – Guidelines for Corporate Support (Dollars and Time)

This schedule will be used in conjunction with Schedule A as a guideline for determining the amount of corporate support (dollars and time) to be allocated to Career Development requests. Final determination of any corporate support will be made by Executive with due consideration to the benefit the organization can realistically expect to achieve through the applicant’s anticipated growth and expanded contribution to the organization (i.e. probable return on investment - ROI).

Eligible costs that may be considered include: registration fees, books and related material costs, travel, accommodation, meals and any other item normally addressed under Personal Expense Policy #0107. It also includes necessary time away from work to attend offsite classes and write examinations.

For the purpose of this Policy, ROI considerations include:

1. the degree to which this Career Development request will prepare the applicant to potentially fill a hard-to-fill succession planning need within the City;
2. the realistic timeframe within which the applicant may attain a position within the City that enables him/her to contribute to the organization at a higher level, consistent with the sought-after academic qualification (considering both applicant readiness and potential position vacancies);
3. the applicant’s demonstrated initiative and proven ability to develop new skills, apply learning in practical ways that add value and create positive results for the organization.

Guidelines:

These are guidelines only. Final determination of corporate funding to be subject to Executive approval. An employee applying for corporate support should address these considerations in their written request – refer also to **Schedule C**.

ROI Factors/Considerations	Guidelines for Corporate Support (\$ and Time)									
	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
1: To what degree does this career development request fit a hard-to-fill succession planning need at the City?	very low	very low	low	low	medium	medium	high	high	very high / unique	very high / unique
2: What is the realistic timeframe within which the applicant may attain a position within the CoMH that requires the level of formal education being sought? (consider both applicant readiness and potential vacancies)	Approx more than ten years	Approx nine to ten years	Approx seven to eight years	Approx six years	Approx five years	Approx four years	Approx three years	Approx two years	Approx one year	Already in such a position
3: Over what period of time has the applicant clearly demonstrated initiative and proven his/her ability to develop new skills, apply learning in practical ways to add value and create positive results for the organization?	one to three years			four to seven years				eight years or more		
4: Average of Considerations 1-3 above.	This policy is subject to any specific provision of <i>The Municipal Government Act</i> or other relevant legislation or Union agreement.									

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Schedule C - Creating An Effective Career Development Proposal

Making the decision to pursue advanced education is an exciting one, and one that requires much thought and planning. The City of Medicine Hat is committed to providing various learning opportunities for staff, and believes that these opportunities are an investment. Before committing to a course or program, consider the following;

1. Am I ready to return to school?

It may have been many years since you have attended school, and your lifestyle and familial role might have changed considerably since you last attended – you may now be married and/or a parent and probably working full-time at a regular day job. These factors can make returning to school as an adult challenging and demanding.

2. Am I ready financially?

Even with assistance, returning to school comes with a cost. Keep in mind that under most circumstances, you will be required to pay for the cost of each course up front. As an adult, you may have financial obligations that impact your ability to fund your educational pursuits. Consider your budget and be cautious about overextending yourself financially as the additional associated stress can impact your ability to be successful.

3. What type of learner am I?

Spend some time evaluating your learning style. There are a variety of learning options, from in class training to online learning. Online learning provides learners with the ability to study at their own pace and allows a student to study when they want, where they want. However, unless you are a very self-disciplined and committed learner who can strictly set and follow deadlines, you might want to consider a form of learning that requires at least some level of physical class attendance and actual contact with course lecturers if this option is available for your course or program of choice.

4. Do I have the time required to dedicate to my studies?

Returning to school, by whatever mode of learning you choose, isn't just a financial investment, it also requires a significant investment of time. Attending an online program adds convenience, but there's still a lot of work involved, even as a part-time student. Familial obligations can make returning to school a challenge. Regardless of the mode of study, the time required to be successful in your studies can be a challenge for relationships. Being well organized is certainly the key. Ensure you have considered the impact on your family and considered how to be as well organized as possible to help ensure success.

Once you have seriously evaluated your readiness to begin studies, you will need to prepare a written Career Development Proposal to submit to your Manager for consideration. Provide a written submission highlighting the benefits of your proposal and the direct and indirect costs involved in the undertaking. In your submission you should address the following:

- 1) The nature of the course or program and mode of study.**
- 2) A summary of the immediate and long-term benefits to you and the City.**
- 3) A calculation of the total course costs, including fees, text books and other course materials.**
- 4) An estimate any time you will be required to be off work to attend to your coursework.**
- 5) What type of assistance you are requesting – cost-sharing of course costs, travel costs, time off work and so on.**

Examples of well written proposals can be provided by Human Resources if requested to assist you in developing a well written and complete submission.

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Schedule D: Learning Contract

THIS AGREEMENT made in duplicate this Day day of Month, 20Year.

BETWEEN

THE CITY OF MEDICINE HAT
(Hereinafter called the "City")

-and-

EMPLOYEE NAME.

The City has committed to provide assistance for Employee Name to pursue advanced studies towards a Programme at School from Click here to enter a date. to Click here to enter a date.. Employee Name has committed to successfully complete the program by Click here to enter a date., unless unforeseen circumstances occur and the City and Employee Name mutually agree to extend this agreement.

Based upon the application of City Policy 8014, the City agrees to fund the following costs:

Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.

Employee Name will be responsible for the following costs:

Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.
Category, i.e.Tuition.	Click here to enter text.%	\$ Approximate Cost.

Employee name shall be 100% responsible for required time away from work, through use of earned vacation or days off.

From the time that confirmation is provided to the City that all program requirements have been successfully completed, Employee Name. agrees that he/she will remain employed with the City for a period of no less than # of months months. Failure to fulfill the post program completion return service commitment, including termination from the City for any reason, will require repayment by Employee Name to the City as per the following formula:

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Total City Investment \$ X # of months short of fulfilling RTW commitment
of months of original RTW commitment

In the event it is deemed that income tax was to have been paid on the portion of tuition paid on behalf of the employee, Employee Name agrees that he/she, and not the City of Medicine Hat, will be responsible for the income tax liability.

SIGNED ON BEHALF OF THE
CITY OF MEDICINE HAT

MAYOR TED CLUGSTON

EMPLOYEE NAME.

ANGELA CRUICKSHANK, CITY CLERK

WITNESS

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Schedule E - CAREER DEVELOPMENT REIMBURSEMENT FORM

EMPLOYEE NAME: _____ **EMPLOYEE NUMBER:** _____

DEPARTMENT: _____

PROGRAM OF STUDY: _____

EDUCATIONAL INSTITUTION: _____

APPROVED REIMBURSEMENT PERCENTAGE: _____

GRADE ACHIEVED: _____ *(NOTE: Please attach a copy of official course grade or transcript.)*

REIMBURSEMENT DETAILS

(See back of this page for Help Guide)

(a) TOTAL COURSE COSTS	\$ _____
(b) TRAVEL COSTS	\$ _____
(c) BOOKS/MATERIAL COSTS	\$ _____
(d) OTHER COSTS	\$ _____
TOTAL (add lines a through d)	\$ _____

PLEASE NOTE

Employees are **NOT** eligible to claim a personal tax deduction on their tax returns when receiving a tax-free reimbursement from the City of Medicine Hat for tuition.

Employee Initials _____

DEPARTMENT G/L CODE: _____

FOR HUMAN RESOURCE USE ONLY

Total \$ _____ X _____ % = \$ _____ TOTAL ELIGIBLE REIMBURSEMENT

GST PAID: _____

PAID ON DATE: _____ PAYROLL INITIALS _____

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CAREER DEVELOPMENT REIMBURSEMENT FORM HELP GUIDE

(A) TOTAL COURSE COSTS: Record the total cost of course registration. An official receipt from the issuing institution must be attached which demonstrates that the full cost of the course has been paid in full. If you have challenged a course for credit, or have had to pay a fee for evaluation of previous coursework, include that amount on this line and submit a detailed receipt.

(B) TRAVEL COSTS: If your Career Development Proposal approved the reimbursement of travel costs, record the total of these costs on line B. Eligible travel costs include; airfare, accommodations, fuel, meals and any other item normally addressed under the Personal Expense Policy (#0107). Itemized receipts for all eligible expenses are required to be attached to the reimbursement submission. Debit and/or Credit card summary receipts are not acceptable.

(C) BOOKS/MATERIAL COSTS: If you were required to purchase any text books or other learning materials separately from your course registration costs, record these costs on line C. Any examination fees, lab fees, or associated costs should be recorded on this line as well. Detailed receipts must be attached to the reimbursement submission form. Debit and/or Credit card receipts are not acceptable.

(D) OTHER COSTS: Any other costs that have been approved and do not fall under any other category can be recorded on line D. Attach detailed receipts and an explanation of the cost for each item claimed.

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Schedule F – Departmental Access to Corporate Training & Development Funds

H.R. PROTOCOL

Title:	DEPARTMENTAL ACCESS TO CORPORATE TRAINING & DEVELOPMENT FUNDS	
Prepared by:	Human Resources (Staffing and Development)	June 8, 2009

STATEMENT

Council has a standing Policy Objective of "Organizational Strength" plus it has a 2008 Strategic Priority for a "Unified Constructive Culture" (*specifically item 2(c)ii – Implement one team building day in every work unit once per year*). Rather than add budget to individual operating departments for the purposes of funding team building / development initiatives, Executive has directed that individual operating departments will be entitled to access funds from the corporate Employee Training Reserve in accordance with this protocol.

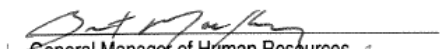
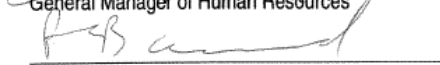
PROCEDURE

All existing and future leadership development programs including Personal Leadership and Work Group Leadership as well as corporately offered sessions such as coaching, emotional intelligence, effective writing, project management, etc will continue to be funded directly from Corporate Training (no change from past practice).

All technical and professional development training currently funded from individual operating department budgets will continue unchanged from past practice.

For initiatives related specifically to team development:

1. Departmental requests for corporate training and development funds shall be focused on "team development" as opposed to individual learning (i.e. no corporate training support to send "Joe or Judy" away to XYZ Program)
2. The maximum amount any department can access from the Corporate Training & Development Reserve in any calendar year = \$200 / staff / year (e.g. a dep't with 60 employees could access up to \$200 x 60 = \$12,000 in any given year).
3. Funding shall be on a use it or lose it basis; no carry-overs to the subsequent year. Any extra costs incurred by department in a given year over and above \$200 / employee shall be born by the individual operating department. (**Note:** The Police Service is eligible for funds only related to their CUPE staff because the department does not contribute to Corporate Training for its Officers).
4. The Corporate Training section of Human Resources, Staffing and Development will have the opportunity to consult and help the department be solid on what they want to achieve, why, who is the best service provider for that type of initiative and when and where. This will be initiated by completing and submitting to Corporate Training a "Request for Corporate Training & Development Funds" Form (*see example attached and/or refer to the intranet under "Forms"*). The intent of this step is to help ensure departments have the best opportunity to contract with a service provider that is best suited to the particular initiative and is also cost-effective. Corporate Training will also assist in the process to contract with facilitators.
5. Departments will only have the opportunity to access Corporate Training & Development Funds if step #4 has occurred. Invoices shall be submitted to and be processed centrally in HR. All costs will be recorded against the established corporate training accounts in HR. Any costs over and above the \$200 / employee upset amount will be journal vouchered back to the requesting operating dept'.
6. A report on team building initiatives and costs will be provided annually to Administrative Committee.


 General Manager of Human Resources

 Chief Administrative Officer

June 23/09
 Date
June 24 09
 Date

This policy is subject to any specific provision of *The Municipal Government Act* or other relevant legislation or union agreement.



REQUEST FORM
ACCESS TO CORPORATE TRAINING & DEVELOPMENT FUNDS

Please refer to the HR Protocol “Departmental Access to Corporate Training & Development Funds”.

The intent of this request form is to provide HR with information to help ensure departments have the best support and opportunity to create effective team development events that meet business objectives. Human Resources is committed to providing consultation, facilitation, and/or coordination of information and resources. We will support you to ensure you develop a process best suited to the particular initiative that is also cost-effective. This support may include assistance in the process to contract with facilitators and other service providers as required.

Today's Date:	Desired Date of Training Delivery:
Contact Name:	Position Title:
Telephone:	Dept/Business Unit:
Tentative Number of Participants:	Approx. Corporate Funding \$ Amt :
GM (or designate) Signature:	

OBJECTIVES: Please identify or explain the overall objective and/or nature of the initiative you want HR to support.

Nature of Initiative	Provide details or √ as many as apply (attach additional info as required)
Annual Retreat	
New Team	
New Team Leader	
General Team Building (Explain)	
Strategic Planning	
Conflict Resolution	
Specific Training Need (examples)	
Other	
Date Contacted (HR Use Only)	

Advance Consultation call 403-529-8326. This will assist us in making a preliminary assessment or provide support on urgent needs.

PLEASE FORWARD THIS COMPLETED REQUEST TO THE HUMAN RESOURCES DEPARTMENT FOR CONSIDERATION.