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Team Lead: Recruitment and Retention Officer	Program Area: Human Resources
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POLICY SUBJECT:

Professional Development, Training & Educational Assistance

PURPOSE:

Professional development and training opportunities allow employees to contribute to the quality and effectiveness of the organization and serve to motivate and retain employees. These opportunities also ensure that all employees maintain or obtain current required technical or professional certification and/or registration to carry out specific job responsibilities.

Educational assistance provides a tool for managers and employees to support academic activities that directly relate to the organization’s identified knowledge, skills, and behaviors (organizational competencies), and support the mission, vision, and values of the organization.

BOARD POLICY REFERENCE:

Executive Limitation (EL-3) Treatment of Staff
 Executive Limitation (EL-8) Compensation and Benefits

POLICY:

Southern Health-Santé Sud recognizes the need for professional development and training in order to achieve personal and professional growth, and to equip the region with a highly skilled staff. Professional development and training is recognized as a joint responsibility and benefit to the region and to employees. Southern Health-Santé Sud provides reasonable educational leave and/or reimbursement of academic costs within its financial capability to permanent employees unless identified otherwise in their respective collective agreement.

DEFINITIONS:

Operational

Regional Orientation: The manager arranges and schedules the mandatory regional orientation which provides new employees with knowledge of Southern Health-Santé Sud philosophy, goals, objectives, policies, procedures and professional expectations. The regional orientation familiarizes

new employees to their workplace, minimizes stress associated with a new job, assists the employee in reaching an optimal level of functioning and promotes harmonious interpersonal relationships.

Professional Credentialing: The manager ensures all employees whose jobs require formal registration with an authorizing standards body present a valid registration or graduate testing marks prior to commencing work in that classification and upon annual registration renewal.

In-Service: Employees are expected to attend in-services deemed required by their manager and are asked to provide verification of attendance. In-services should be offered to all permanent employees during normal working hours without loss of pay. Managers accommodate shift changes where the in-service schedules cannot.

Workshops, Courses and Conferences: Attendance is initiated by managers or is approved as equitably as possible based on such factors as applicability for the employee, demonstrated participation in in-services, no opportunity to attend in recent years, demonstration of personal responsibility for self-development, and if requested an agreement to provide an in-service or written report immediately following attendance. Employees forward their requests to managers for approval which will be based on relevancy and available funding.

Consideration is given on a case by case basis for requests where employees are enrolled in courses to upgrade or maintain their technical/professional registration, or initiate a request to attend a workshop, conference or short course which is not considered essential, and for which there are no available operating dollars within their facility/program.

In all cases, employees submit verification of attendance and claim for reimbursable out of pocket expenses on the Expense Claim form.

Employees experience no loss of service, seniority or benefits during time away from the workplace to participate in the education and training opportunities referred to above unless identified otherwise in their respective collective agreement.

Professional Development

Allowance: Southern Health-Santé Sud commits to supporting memberships relating to management and/or programs and services for the purpose of professional development that benefit the organization. Full-time or part-time employees seeking to develop and enhance their skills and prepare themselves for additional responsibilities through continuing education may be eligible for a Professional Development Allowance provided by Southern Health-Santé Sud. Professional Development Allowance is not available for acquiring the required qualifications of their current position. Consideration will be made for exceptions relating to regional initiatives, including casual employees, based on Senior Leadership approval. The implementation of this plan will conform to Revenue Canada's regulations pertaining to taxable benefits to individuals and the ability of Southern Health-Santé Sud to exercise control over funds. The organization provides reasonable Educational Leave and/or reimbursement of academic costs within its financial capability to permanent employees unless identified otherwise in their respective collective agreement. This amount will be inclusive of funds from any other source within Southern Health-Santé Sud.

Professional Development Allowance is available by application for financial assistance to be paid towards an employee's cost of furthering their education of an approved recognized course from an

acceptable educational institution. It may include all or a portion of the eligible costs including; salary and wages of the employee, tuition, books, registration or examination fees or any other related legitimate expenses as approved by a Senior Leader, or designate. Proof of progress, successful completion and receipts are required to support all claims.

Return of Service Agreements: Southern Health-Santé Sud considers Return of Service Agreements for employees who are approved for financial assistance for educational purposes or who are provided with specialized training within their work area. The agreement is for minimum hours of service required to be returned and may be equal to the length of time taken to obtain the educational standing.

Interest Free Loan – Promissory Note: Employees approved for financial assistance sign an Interest Free Loan - Promissory Note in exchange for a Return of Service Agreement. The period of return of service specified in the agreement is for minimum hours equivalent to a full time service for twelve (12) months or equal to the length of time taken to obtain the educational standing.

Short-Term Educational Leave: Short-term educational leave refers to a leave of absence from work for the purpose of taking professional, technical, or skills training where the employee will be absent from work for a period of thirty (30) working days or less.

Long-Term Educational Leave: Long-term educational leave refers to leave of absence from work for the purpose of taking professional, technical or skills training where the employee will be absent from work for a period exceeding thirty (30) working days.

PROCEDURE:

Tuition - Course Registration Fees Refund

The employee completes a Request for Leave form.

The Senior Leader, or designate, will approve payment of the employee's tuition/course registration fees, or a part thereof, where the claim is supported by a receipt and the course is successfully completed.

In addition, the Senior Leader, or designate, will authorize for that employee:

- Leave of absence with pay for the purpose of writing examinations;
- Payment of the expense of writing the examinations;
- Payment of traveling expenses in accordance with the travel regulations.

Interest Free Loan - Promissory Note

1. The employee completes an Interest Free Loan – Promissory Note.

An Interest Free Loan – Promissory Note request is considered on an individual basis for employees who wish to take education while continuing to work in their position. Monies approved must be used towards the attainment of an approved recognized course from an acceptable educational institution. A promissory note is determined by the minimum bi-weekly payroll deduction repayment schedule. Typically, the amount to be repaid to Southern Health-Santé Sud is received within a one (1) year time period.

An employee who does not satisfactorily complete the educational program, the outstanding

balance of the loan is repaid in full within sixty (60) days. The Senior Leader, or designate, may grant an extension of the loan repayment if satisfied that the circumstances for timely repayment is beyond the employee's control. Approved expenses are limited to tuition, books and other fees and expenses imposed by the educational institution.

Short-Term Educational Leave

1. The employee completes a Request for Leave form.

A Short-Term Education Leave does not require the employee to sign a Return of Service Agreement.

Long-Term Educational Leave

1. The employee completes a Request for Leave form.
2. The employee completes and signs a Return of Service Agreement for Existing Employees.

Minimal length of service specified in the Return of Service Agreement for Existing Employees:

Length Of Long Term Educational Leave	Return Of Service Required based on Equivalent Full Time (EFT) Status
Thirty-One (31) to Ninety (90) days	Six (6) months
Three (3) to Six (6) months	One (1) year
Six (6) months to One (1) year	Two (2) years

Where an employee does not complete the Return of Service Agreement or does not satisfactorily complete the course of training, they are obligated to pay back the funds provided to them on a prorated basis unless the Senior Leader, or designate is satisfied that the failure to satisfactorily complete the course of training is due to a cause beyond the employee's control.

Continuation of Benefits

An employee on a paid Educational Leave is eligible to accumulate sick leave credits and vacation leave credits. No carry-over of vacation credits is permitted where educational leave is granted for a period of twelve (12) months or more.

Merit increase occurring during the period of an Educational Leave is postponed and may be granted by the Senior Leader, or designate, effective the first day of the month in which the employee returns to work from successful completion of the course or training.

As per Canada Revenue Agency legislation, employees receive a T-slip at the end of the calendar year.

SUPPORTING DOCUMENTS:

- [ORG.1310.FORM.001](#) Employee Expense Claim
- [ORG.1510.PL.014.FORM.01](#) Request for Leave Form
- [ORG.1511.PL.008.FORM.01](#) Return of Service Agreement for Existing Employees
- [ORG.1511.PL.008.FORM.02](#) Interest Free Loan – Promissory Note

REFERENCES:

- [ORG.1511.PL.007](#) Professional Credentialing