



POLICY No. 2003-06 Professional Development and Education Financial Assistance Program

Originating Department	CS-HR-09-2003		
SMT Approval:	2003-03-27		
Council in Committee:	2003-04-14	Recommendation #:	10
Council Approval:	2003-04-22	Resolution #:	108-03
Revision History:			Click here for revision history

1. PURPOSE

Haldimand County encourages employees to continually upgrade and develop their work-related knowledge and skills through professional development and continuing education opportunities. This Professional Development and Education Financial Assistance program is provided for this purpose.

2. POLICY

Haldimand County's people are its most important asset and resource and this program is intended to ensure an environment that supports the development of employees in meeting their career and personal goals and objectives.

Funding for professional development and continuous learning opportunities for staff will be included in each Division's annual operating budget in amounts approved by Haldimand County Council. Additional funding may also be available through a Corporate account, where available and approved by the Chief Administrative Officer.

3. SCOPE

Permanent full-time and permanent part-time employees who have successfully completed their probation period are eligible to apply for financial assistance prior to their enrolment in a course of study.

Permanent full-time employees are entitled to apply for financial assistance up to 100% of the course cost and Permanent part-time employees are entitled to apply for financial assistance up to 50% of the course cost.

Financial assistance is available for courses / programs that

- provide a mutual benefit to both the employee and the County
- are offered by a recognized educational institution or professional organization, and
- are designed to expand and / or broaden an employee's knowledge or develop potential to assume greater responsibility within the organization.

In-house training opportunities are not eligible under this Program. If, for example, the County provides specific training (such as specific Supervisory Training, Transportation of Dangerous Goods), financial assistance will not be provided to employees who choose to obtain the same training through an external source.

In all cases, the employee and his / her Manager will discuss training opportunities that will benefit both the employee and the organization. If the Manager agrees that an opportunity meets the criteria to be funded, in part or in full by the County and the resources will allow such opportunity, they shall make recommendation for approval as follows:

- to the General Manager for Courses/Programs with a total expense of up to \$1,000
- to the Chief Administrative Officer for Courses/Programs with a total expense of more than \$1,000

Expenses related to *conferences, seminars and workshops* are dealt with in Haldimand County Policy #2001-05, Expense Remuneration Policy for Members of Council, Members of Staff, Volunteers and Appointees.

4. PROCEDURE:

Scenario One – Required Professional Development

When the Manager or General Manager directs the employee to take a job-related training course, the County will assume responsibility for 100% of the costs involved (including tuition, course materials, mileage, parking, meals and accommodation). The employee will be paid their normal hourly rate for seven hours / day (Monday to Friday) for the duration of the course. The employee is required to provide documentation to validate successful completion of his studies for retention on their personnel file in Human Resources.

Scenario Two – Beneficial Professional Development, Requiring Up-Front Financial Assistance

When a course/program is recommended by the Manager or General Manager as part of an employee's general development plan, including leadership development, the County will assume responsibility for 100% of the tuition and materials costs, provided that the employee is successful in the program.

When an employee requests the opportunity to participate in a course / program related to their work at Haldimand County and requires financial assistance, the County may assume responsibility of up to 100% of the tuition and material costs.

In both cases, the following will apply:

1. The employee will complete and submit the Application for Financial Assistance (Attachment A) and Promissory Note (Attachment C) along with a course outline to their General Manager and then if applicable (for courses over \$1,000) to the CAO, for approval prior to the commencement of the course of study.
2. If approved, the approved documentation will be forwarded to Finance, with a copy to the employee, and a copy to Human Resources. If not approved, the employee and manager will be notified in a timely manner.
3. The approved documentation will serve as authorization for the employee to proceed with enrollment.
4. At the end of the course, the employee will provide their Manager and Human Resources with proof of successful completion which will be retained on their personnel file in Human Resources.
5. Human Resources will track the timelines identified in the Promissory Note.
6. Any financial assistance issued will be shown as an employee advance and recorded in the County's financial records as an advance.

Scenario Three – Reimbursement of Costs for Beneficial Professional Development

When an employee requests the opportunity to participate in a course / program related to their work at the County and does not require up front financial assistance, the County may agree to reimburse for up to 100% of tuition and materials costs. In this case, the following will apply:

1. With the approval of the General Manager or CAO as applicable, the employee will enroll in the course. At the end of the course, the employee will provide proof of successful completion of the course and a REFUND REQUEST (Attachment B) to their Manager for approval.
2. The approved documentation will be provided to Finance with a copy to the employee and to Human Resources.
3. Proof of successful completion of the course will be retained on the employee's personnel file in Human Resources.
4. Finance will issue the refund cheque to the employee and Human Resources will track the timelines identified in the Promissory Note.

5. PROMISSORY NOTE:

A Promissory Note (Attachment C) must be completed when an employee has been approved for financial assistance (Scenario 2), or whenever an employee will be participating in a professional development opportunity in which they have not been directed by their General Manager or CAO to enroll in, but rather have personally chosen the development opportunity with a total expense of more than \$1,000

The purpose of the Promissory note is to confirm that:

1. The employee must remain actively employed by Haldimand County throughout the duration of the training opportunity.
2. If the employee is unsuccessful in completing the training opportunity, the employee will be required to repay the full cost incurred.
3. If the employee leaves the employ of the County up to eighteen months after completing the course, they will be asked to repay any professional development or education funding received pro-rated to eighteen months following completion of the course.

Note: Month is defined as a calendar month and employment of a minimum of 10 working days in such month shall qualify the employee for a full month's credit.

Attachments:

Attachment A – Financial Assistance Request Form
Attachment B – Refund Request Form
Attachment C - Promissory Note

**Haldimand County
Professional Development and Education Financial Assistance Program**

APPLICATION FOR FINANCIAL ASSISTANCE

Employee Name:		Div / Dept:	Date:	
I request approval of the following course(s) under the Professional Development and Education Financial Assistance Program. I understand that in order to be eligible; each course must be approved PRIOR TO ENROLMENT.				
Course Name, Course Number & brief outline of course content	To be taken at (educational institute)	Start Date	Anticipated End Date	Tuition Fee (including textbooks)
Please check (✓) one of the following. <input type="checkbox"/> The above course is being taken as part of a curriculum leading to _____ OR <input type="checkbox"/> The above course is an independent program and not related to a degree, diploma or consolidated certificate				
Why do you think this course will enhance your effectiveness as an Employee of Haldimand County and how does it relate to your current position? 				
I am requesting a Tuition Advance in the amount of \$_____.				
Employee Signature:			Date:	

DEPARTMENT APPROVAL

Briefly state why you are recommending approval.

The tuition advance requested above in the amount of \$_____ is authorized. YES NO

The requested cost of tuition advance is within the established divisional budget YES NO

Manager	General Manager (if up to \$1000) or CAO (if more than \$1000)	Date

REFUND REQUEST

(To be completed when the employee has already paid his / her own professional development / educational program or course costs and is seeking reimbursement following successful completion)

TO: Finance Division (Name of Employee) has paid for and successfully completed the following course: Course Name: Course Source: Course Duration:	
Direction: Please reimburse this employee in the amount of \$ Required receipts and / or proof of successful completion of the above-noted course are attached and submitted herewith.	
Manager's signature:	Date:
General Manager's /CAO Signature:	Date:
<small>Note: CAO signature required for training opportunities in excess of \$1000</small>	

PLEASE NOTE:

Full or partial repayment of Professional Development and Education Financial Assistance funding will be required if the employee leaves the employ of Haldimand County within 18 months of completing his / her course(s) / program.

Each situation is reviewed on its own merits.

The employee must sign a promissory note (Attachment C) agreeing to this condition once the course(s) / program costs have been confirmed.

The Corporation of Haldimand County

P.O. Box 400
Cayuga, ON N0A 1E0

Telephone: (905) 318-5932
Fax: (905) 772-3542

PROMISSORY NOTE

In the amount of \$_____

Financial Assistance Related to the Professional Development and Education Financial Assistance Program

This certifies that I, _____, as an employee of the Corporation of Haldimand County, did receive education financial assistance from Haldimand County in the amount of \$_____. This financial assistance relates to the following educational course/program taken during my employment at the County _____ over the following time period _____.

Should I fail to provide evidence of successful completion of the educational course/program, I promise to fully repay the amount of financial assistance received as stated above. I accept that my supervisor will determine the appropriate time period to repay this amount, that I will be ineligible for any further education financial assistance until the repayment has been made in full, and that in all cases the full amount owing will be paid within one year.

Should I leave the employment of the Corporation for any reason during the eighteen month period following the completion of said course/program, I promise to repay a prorated portion of the education assistance based on the percentage of months not employed following reimbursement to a maximum of eighteen months. This repayment will be made on or before my last day of employment with Haldimand County.

- In the case that I am required to repay the full or partial amount, an acceptable method of payment will be discussed with my supervisor, and I agree to repay the amount according to their preference for the situation. Possible methods include, but are not limited to: Direct Payment through Accounts Receivable (lump sum, or payments according to schedule)
- Reimbursement through Accounts Payable (to be recovered through future expense claims / other reimbursements)
- Reimbursement through Payroll Deductions (per an approved schedule)

Employee's Signature

Witnessed by Manager

Employee's Name (Please Print)

Manager's Name (Please Print)

Date Signed

REVISION HISTORY					
REPORT	CIC		COUNCIL		DETAILS
n/a	n/a	n/a	n/a	n/a	Policy revised by Senior Management Team in February, 2016
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	
	Date	Rec#	Date	Res#	