

Learning and Development

Original Implementation Date:	May 28, 2015	Approved by:	Richard Butts, CAO
Date of Last Revision:	November 5, 2020	Approved by:	Jacques Dubé, CAO
Effective Date of Last Revision:	August 1, 2021	Approved by:	Jacques Dubé, CAO

1 – Policy Name

Learning and Development

2 – Purpose

Halifax Regional Municipality (the Municipality) supports employee professional development. The goal is to develop a highly qualified and motivated workforce that can respond to evolving organizational needs and achieve the Municipality's corporate goals.

3 – Objectives

To support employee professional development opportunities that:

- Meet the needs of the Municipality's corporate plan and business strategies.
- Support the goals of individual business units.
- Contribute to succession planning and employee retention goals.
- Contribute to developing key corporate-wide skills and competencies that aid in maintaining a flexible, adaptive and pro-active workplace able to meet the changing needs of the Municipality.
- Outline the conditions for which employees may be reimbursed for the costs of education and training.

4 – Scope

This Policy applies to all employees of Halifax Regional Municipality.

5 – Definitions

In the context of this document:

Ancillary Fees means any additional fees associated with the cost of completing an Approved Program including, but not limited to the following:

- Course materials, including textbooks
- Examination fees
- Parking fees
- Deferred or late payment fees

- Course credit transfer fees
- Required membership fees
- Student medical insurance
- Transportation, lodging and meal fees
- Professional membership fees
- Costs incurred due to lost wages while traveling to or attending courses
- Miscellaneous fees and supplies

Approved Program(s) means a course or program delivered by an accredited educational institution, agency or provider of continuous learning services. This includes, but is not limited to, undergraduate and graduate level programs, trades accreditations, and courses leading to a professional certification. The educational institution, agency or provider of continuous learning services must appear on either the [‘Master List of Certified Institutions’](#) or the [‘Master List of Designated Educational Institutions’](#) maintained by the Government of Canada. Any exceptions must be justified by a business case and approved by the Executive Director of Human Resources.

Career-Related Training means training related to succession or retention planning or career development initiatives which concern the employee’s future work assignments.

Operational Training means training needed for the employee’s current work assignment.

Professional Designation means a designation earned by a person to assure qualification to perform a job. Examples include but are not limited to: Chartered Professional Accountant (CPA), Certified Human Resources Professional (CHRP), Project Management Professional (PMP).

Trade Association means an institution that groups many businesses from an industry to increase political influence and create networking opportunities. Its members are industry participants that meet to tackle different subjects related to their work field.

Training means a formal event with the purpose of imparting skills or knowledge toward desired behavioral change or performance improvement.

Tuition Fees means required fees for completing an Approved Program and does not include ancillary fees.

6 – Roles and Responsibilities

Executive Directors

Executive Directors are responsible for:

- Ensuring that training and development plans are developed each year and that

allocated training budgets are used appropriately within the business unit.

- Monitoring and evaluating the success of training initiatives sponsored by the business unit.
- Ensuring management teams identify competencies, skills and abilities necessary for employee development.
- Fostering an environment that encourages learning and ensuring that all employees are offered equal opportunity for development and advancement.

Directors/Managers

Directors/Managers are responsible for:

- Undertaking needs analyses, validating training requirements and assigning priority to training opportunities.
- Ensuring that scheduled learning and development is carried out in a planned manner so effective work force levels are maintained.
- Ensuring that employees enrolled in training attend the sessions.
- Ensuring that a development and training plan is incorporated as part of the business plan including appropriate budget allocations to reflect the training needs.
- Assisting employees with recommendations for operational training or technical training that will enhance current or future business unit plans and service delivery.
- Provide opportunities for employees to use new skills and learning.
- Approving reasonable requests for learning & development as per this Policy.

Employees

Employees are responsible for:

- Taking responsibility for initiating their participation in any training and development opportunities offered by the Municipality.
- Helping to identify the skills, abilities and knowledge required to accomplish their current duties in the most effective way.
- Bringing their long-term career development and training interests to the attention of their director/manager.
- Applying themselves personally and professionally in developing their own potential.
- Exhibiting appropriate behaviors in alignment with the Municipality's values while attending training and development opportunities.

7 – Policy Regulations

Principles and Considerations:

- Provide fair and equitable opportunities for learning to all eligible employees, in alignment with this policy and applicable collective agreements.
- Ensure a commitment to training that is respectful and inclusive of diversity.
- Use existing training facilities whenever possible and/or provide an appropriate learning environment for all training.

Employee learning and development needs can be met in several ways and should be encouraged in all business units. Some practical ways include the following:

- Position Rotation (Cross-training)
- Coaching/Mentoring
- Internships/Apprenticeships
- Committee and Project Team Assignments
- On-The-Job Training
- Self-Directed Courses
- University/Community College Programs
- Workshops/Seminars
- Internal Learning and Development Opportunities

Approvals:

<i>Training Activity</i>	<i>Approval Authority</i>
A. Corporately offered training courses and programs	Director/Manager
B. Business Unit training courses and programs	Director/Manager
C. Training courses and programs at an educational institution for Career Related Training	Executive Director
D. Professional Designations	Executive Director
E. Training courses or programs involving out-of-town travel	Executive Director, CAO
F. Request for Education Assistance Reimbursement	Director/Manager

Funding of Training

Operational, Career Related Training, or Professional Designation costs/reimbursement are paid by the business unit provided that Manager/Director/Executive Director/CAO approval has been obtained (see previous section). Training may be fully or partially funded by the business unit. The amount of funding granted to an employee for training is proportional to the benefit that the business unit can reasonably expect to derive from its investment. Funding should therefore be determined according to the following guidelines unless otherwise stipulated by the provisions of a collective agreement:

A. Full Funding of Training:

Fully funded training may be granted when the training:

- meets a knowledge/skill requirement essential for the efficient and effective operation of a business unit program;

- relates specifically to the employee's present or planned work requirements; and
- primarily benefits the business unit.

B. Partial Funding (50%) of Training

Partially funded training (50%) may be granted when the training:

- contributes significantly to the department's operations but is not essential;
- is generally related to the employee's present or planned work requirements; and
- mutually benefits the department and employee.

C. Requests for Education Reimbursement

The cost of programs undertaken independently will be borne by the employee. This includes all education leading to the completion of a university degree or diploma. Employees may refer to the Education Reimbursement section of this Policy when the training/education:

- is not required by the department;
- is not related to the employee's present or planned work requirements; and
- primarily benefits the employee's career development but still has a potential benefit to the Municipality.

Education Leave

Business Units may provide education leave to accommodate the attendance of training during work hours. An employee may be paid for time missed due to the attendance of training under the *Funding of Training*, options A and B. All other educational leave will be unpaid and require completion of the *Application for Leave* form.

Professional and Trade Association Memberships

Business Units may cover the costs of professional or trade association membership providing any of the following criteria are met:

- A. The membership is obtained through examination and/or professional standing associated with education qualifications such as C.A., P.Eng, MCIP, or C.G.A.
- B. The organization provides literature relevant to the job description of the employee.
- C. The organization provides interpersonal relationships appropriate to the job discipline.
- D. The organization provides valued input to topical subjects that affect the short- or long-term operations of the business unit.
- E. Membership in the organization is seen as advantageous for corporate marketing and/or business development purposes.

Directors/Managers will authorize paid membership where membership is a job requirement, as stipulated in collective agreements and/or conditions of employment. Where membership in one organization requires a second membership in a larger organization as a condition of membership), the two memberships will be paid.

Education Reimbursement

The Municipality is committed to the continuous learning and development of our employees, developing stronger leaders, and attracting and retaining a diverse, highly skilled, high performing workforce. This commitment helps the Municipality maintain a strong and efficient public service. The Municipality may provide education reimbursement to permanent full-time and permanent part-time employees who have completed all probationary requirements of employment and are able to demonstrate their education development supports the Municipality in its objectives.

An employee must meet the following conditions to be eligible for reimbursement:

- A. Be a permanent full time or permanent part time employee of Halifax Regional Municipality.
- B. Have completed all probationary requirements of employment.
- C. Attain good standing for performance appraisals/requirements.
- D. Adhere to Halifax Regional Municipality policies and business practices including but not limited to the following:
 1. Workplace Rights Harassment Prevention Policy
 2. Substance Misuse Prevention Policy
 3. Workplace Violence Prevention Corporate Procedure

The Municipality may at its sole discretion, reimburse Tuition Fees subject to available funds under the following guidelines:

- A. Up to 50% reimbursement of tuition fees for Approved Programs for which an employee has been able to demonstrate their educational development has the potential to support the Municipality in its ability to provide a strong and efficient public service.
Reimbursement will be to a maximum of \$2500 CAD per employee, per fiscal year (April 1st- March 31st). This yearly maximum will be applied to the year in which the employee completes the Approved Program. Business units are not permitted to provide additional reimbursement (or to 'top up') beyond the scope of this Policy.
 - Where a collective agreement provides for a greater dollar amount or percentage of reimbursement upon course completion, the collective agreement applies instead of this Policy, not in addition to it.
- B. Reimbursement will only be provided for Approved Programs in which a passing grade is awarded. An employee who fails to complete a program or obtain a passing grade will not qualify for reimbursement.
- C. The Municipality will not provide reimbursement for any Ancillary Fees.

An employee **must seek pre-approval** for reimbursement before beginning an educational program by completing an 'Education Reimbursement Pre-Approval Form' and submitting it to their director/manager for approval.

Once the employee's director/manager approves the request, the form must then be submitted to the Municipality's Corporate Training office where it will be reviewed to determine if it meets the conditions under this Policy. An employee may request pre-approval for individual courses or for the entirety of a program leading to a degree or certificate.

An employee must submit the following to the Municipality's Corporate Training office within two (2) months of the Approved Programs completion:

- A. A completed 'Education Reimbursement Program Completion' form.
- B. Proof of successful completion of the Approved Program.
- C. Payment verification and original receipts.

No reimbursement will be provided until all documentation is reviewed by designated Human Resources staff. The Municipality may request additional supporting documentation as it deems necessary.

Upon receipt of all necessary documentation, Human Resources will verify the application and forward the necessary documentation to the appropriate employee, director/manager and Finance to complete the reimbursement request.

A written contract must be signed prior to the employee commencing the Approved Program whereby the employee agrees to repay The Municipality the reimbursed amount should they voluntarily resign their employment.

Repayment is prorated from the date the employee completes the Approved Program:

- 100% if the employee terminates their employment before 24 months less a day;
- 50% if the employee terminates their employment between 24 months and 36 months less a day;
- 0% if the employee terminates their employment after 36 months.

All reimbursement approvals are subject to the availability of funds. Should funding not be available, approval may be delayed or declined.

8 – Repeal

Replaces Employee Learning and Development Policy, Request for Education Reimbursement, Education Leave, Career Planning and Professional and Trade Association Membership.

9 – Effective Date

August 1, 2021

10 – Related Policies and Practices

N/A

11 – Policy Review

Review every year.

12 - Contact

Human Resources- Learning & Development, Corptrain@halifax.ca

13 - Attachments

Learning and Development forms:

<http://insidehrm/BusinessUnits/HumanResources/TrainingDevelopment.html>

- Education Reimbursement Pre-Approval
- Education Reimbursement Program Completion

Leave Application Form

<http://intranet.halifax.ca/BusinessUnits/HumanResources/Documents/LeaveRequestformFillableFinal.pdf>