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|-----------------------------------|--|-------------------------|
| <b>Guideline Title:</b>           | <b>Applies to:</b>   | <b>Reference #</b>      |
| <b>Long-term Learning Program</b> | <b>All Employees</b>   | <b>102-HR-11</b>        |
| <b>Approved by:</b>               | <b>Dates:</b>  | <b>Total # of Pages</b> |
| <b>Director's Forum</b>           | <b>Effective:</b> 25-Jul-2011<br><b>Revision:</b> 14-Mar-2013<br><b>Next Review:</b> TBD | <b>4</b>                |
| <b>Authority:</b>                 |  |                         |
| People and Organizational Culture |  |                         |

## 1.0 Purpose

The Long-term Learning Program is intended to bridge the gap between the current Tuition Subsidy program and a future policy that will govern the approval and allocation of funding for both long and short term professional development requests.

As an interim solution, these guidelines and procedures will be used as the authority to approve multi-year financial assistance for learning programs that extend beyond a single calendar year until such time that a full policy is adopted.

## 2.0 Scope

These guidelines apply to all City of Regina employees who have a minimum of 6 months full-time continuous service.

## 3.0 Definitions

**Long-term learning program:** A series of courses that culminate in a designation, degree etc. Examples include: Executive Master's of Business Administration (EMBA), Master's of Science (M.SC.), Project Management Professional (PMP), accredited vocational programs, PhD's etc.

**Successful completion of a course:** A passing grade, as established by the given program and/or institution.

**Financial assistance:** Refers to money paid to or on behalf of an employee for the purpose of participating in an educational program. Authorized expenses are outlined in an employee's approval letter and may include all or a portion of the program-related costs, including:

- Tuition

- Travel expenses (airfare, hotel, meals etc.)
- Books and other required materials
- Laboratory fees
- Registration fees
- Examination fees
- Any other related, legitimate expenses.

**Return-service obligation (RSO):** a prescribed number of consecutive calendar months whereby an employee commits to continue working for the City of Regina immediately following the completion of their education.

**Long-term Learning Agreement:** a contract that outlines the promissory terms that must be fulfilled by an employee in exchange for financial support through the LongTerm Learning Program (Appendix D). This agreement is a signed, legally-binding document.

#### 4.0 Guidelines

- This multi-year educational allowance may be approved to support long-term learning programs that pertain to the City’s existing or future business needs.
- Long-term Learning Agreements are awarded at the discretion of Divisional leadership and financed by Divisional/Department budget dollars.
- People and Organizational Culture is responsible for the administrative support of this program and ensuring consistent and equitable application of guidelines and approvals.
- A Professional Development Request form (Form B: Long-term Learning Program, Appendix A) and application package will be used to inform the approval process and funding decisions. Requests will be evaluated on a caseby-case basis according to business need, employee performance, availability of funds, proposed business case, and the overall fit with the City’s long-term strategic vision.
- Full or partial assistance may be granted. The level of funding is informed by way of succession planning strategies and the determined value of the investment (employee and educational program) to the overall corporation.
- Funds awarded through this program are considered a financial loan that is repayable through return-service (RSO) to the City for a prescribed period of time that will range from a minimum of six (6) months to a maximum of thirty-six (36) months.
- RSO is determined using the following scale:

| Return Service Obligation (RSO) Reference Chart |           |                     |           |
|---|-----------|---------------------|-----------|
| < \$5,000                                       | 6 Months  | \$15,000 – \$19,999 | 24 Months |
| \$5,001 – \$9,999                               | 12 Months | \$20,000 – \$24,999 | 30 Months |
| \$10,000 – \$14,999                             | 18 Months | \$25,000 >          | 36 Months |

- Return Service Obligation begins at such time that the employee submits written notification to their Deputy City Manager (cc. P&OC) requesting commencement of their RSO on the basis of the Long-term Learning Agreement. In addition to this request, the employee must provide documented proof of having successfully completed all requirements of the funded program.
- Continued funding is subject to the fulfillment of all provisions outlined in the program guidelines and the Long-term Learning Agreement. Documents must be submitted to P&OC on a regular basis to verify learning progress and/or successful completion of the sponsored program; copies of these documents will be retained and placed on an employee's personnel file.
- Employees must maintain an acceptable level of performance in their job and in their studies. If an employee fails and/or withdraws from the program, they are responsible for reimbursing any funds that have been issued and/or associated with the incomplete course(s)/modules, including payment for related travel, lodging, materials and other expenses. Agreement will be revised according to the total investment paid for successfully completed courses; RSO may be pro-rated based on the new total and the RSO Reference Chart.
- Repayment rate is calculated in accordance with the total financial investment and length of RSO - ranging from a minimum of \$150 to a maximum of \$1000 for each month of service subsequent to successful completion of the program.

## 5.0 Application Procedures

Step 1. Employee completes electronic application form and assembles all relevant documentation. **Incomplete applications will not be forwarded for consideration.**

To be included:

- Completed Application Form: All materials must be received on / or before any deadline dates.
  - Description of program and all associated fees
  - Any information and/or forms that would be necessary to set up direct payments with the educational institution
  - An updated resume
  - A Personal Statement of Interest: that outlines one's purpose for pursuing for professional development. This business case must include the following information:
    - a) How this education will support your career with City of Regina;
    - b) How you will use this education to help advance the City's corporate strategy;
    - c) How this education is reflected in your Personal Development
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Plan or CareerMAP;

- d) Your overall learning goals and objectives; and
- e) Any additional information that supports your application and request for funding.

- Step 2. Application package is forwarded to their Manager for review and recommendation.
- Step 3. Manager submits application package to Director for review and recommendation.
- Step 4. Director submits application package to DCM for review and approval.
- Step 5. DCM forwards approved application package to P&OC for administration.
- Step 6. HR supports office of DCM in advising employee.
- Step 7. HR prepares formal Long-term Learning Agreement.
- Step 8. Employee meets with HR to review and sign Agreement.

## **6.0 Reimbursement Procedures**

- Step 1. Employee completes Request for Reimbursement form (Appendix E) and prepares copies of all documentation to be submitted (receipts and record of grades etc.).
- Step 2. Form and copies are submitted to manager for review and signature.
- Step 3. Employee submits Request for Reimbursement form and copies to P&OC for processing.
- Step 4. Employee's reimbursement is deposited along with their usual payroll.

## **7.0 Related Forms**

Appendix A: Professional Development Request Form B: Long-Term Learning Program  
Appendix E: Request for Reimbursement

## **8.0 Reference Material**

See Appendices

## **9.0 Appendices**

Appendix A: Professional Development Request, Form B: Long-term Learning Program  
Appendix B: Out of Scope Guidelines (Tuition section only)  
Appendix C: Tuition Subsidy Policy

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Appendix D: Long-term Learning Agreement

Appendix E: Request for Reimbursement