

<b>MUNICIPALITY OF THE COUNTY OF ANNAPOLIS POLICY AND ADMINISTRATION MANUAL</b>		<b>AM - 2.5.2</b>
<b>Section Human Resource Development</b>	<b>Subject Educational Leave &amp; Assistance</b>	

**1. APPLICATION**

This policy applies to employees of the Municipality of the County of Annapolis. Conferences of municipal and professional associations attended by Municipal Council and staff are not covered under this policy.

**2. AUTHORITY**

Section 65, Municipal Government Act. Municipal Council Approval 95/11/21.

**3. BASIC POLICY**

Municipal Council determines the annual budget for education and training in the interests of improving individual and organizational performance. This budget is managed centrally by the Chief Administrative Officer.

Department Heads shall submit a human resource development plan to the Chief Administrative Officer annually identifying the education, training, and professional development needs of all department staff and indicating estimated costs and priority. Department plans should specifically address needs identified in the process of individual work planning and performance review. The Chief Administrative Officer shall submit an overall human resource development plan to Municipal Council in support of the proposed annual budget.

All long-term educational leave and assistance must be approved by Municipal Council. Upon Municipal Council approval of the annual budget, the Chief Administrative Officer shall authorize all expenditures contained in the education and training budget in accordance with the approved human resource development plan. The Chief Administrative Officer shall have discretionary authority to approve amendments and substitutions provided no expenditure which would cause the budget to be exceeded is undertaken without the approval of Municipal Council.

**4. POLICY INTENT**

To provide reasonable leave and appropriate financial assistance to personnel who:

- based upon their own personal and professional development goals make a request; and/or
- are requested by their Department Head to take further education or training to improve their ability to perform in present and/or new assignments.

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**5. ENTITLEMENT**

Educational leave and assistance is not a reward for service or a benefit to which every employee is automatically entitled.

Leave and/or assistance is granted based upon individual and organizational goals for career development and is based upon the Municipality's ability to meet continued operating requirements. Duration and timing of leave may also impact the granting of and financial assistance for such leave.

If leave and/or financial assistance is granted, the amount(s) will be specified and will be based upon management's assessment of the relative costs and benefits to the individual and the organization. The amount may range from unpaid leave and no cost sharing of expenses to fully paid leave and full cost sharing of expenses (as per Appendix B).

Granting of educational leave and assistance to any employee is at the discretion of the Municipality. The fact that an individual may comply with the eligibility requirements and qualify for the program does not mean that any leave or assistance will be granted to any given employee at any given time and the Municipality reserves the right to use its absolute discretion in awarding such leave.

**6. FINANCIAL ASSISTANCE**

Amounts paid to or on behalf of an employee for education and training during educational leave may include all or some portion of eligible costs including:

- salary or wages of the employee;
- tuition & term fees or program fees;
- travel expenses, meals and lodging (as per Municipal Policy);
- books and course materials;
- examination fees; and
- other legitimate related expenses.

**7. PROMISSORY NOTE**

An employee granted long-term or special educational leave is required to sign a non-interest bearing promissory note equal to the amount of financial assistance granted. The promissory note will be forgiven on a pro rata basis over the term of a return service agreement.

**8. RETURN SERVICE AGREEMENT**

Where financial assistance is granted for any long-term or special educational leave, the employee is required to sign a return service agreement. As a general guideline, return service required will be two months of service for each month of long-term or special educational leave granted. The actual term of any return service agreement will be negotiated at the time based upon cost of the program, duration, and nature of the leave.

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**9. EMPLOYEE REPLACEMENT**

In certain cases, the granting of long-term or special educational leave may require that a term replacement employee be hired. If an unpaid leave is granted, the salary or wages of an employee replacement shall be funded from the departmental budget for staff salaries. If a paid leave is granted, the salary or wages of an employee replacement shall be funded from the central education and training budget, unless some other arrangement is specified by Municipal Council as part of the approval. The salary or wages of a replacement is not included in the promissory note required under Part 7 of this Policy.

**10. TUITION REFUND**

The Chief Administrative Officer has discretionary authority to approve a reimbursement of all or a portion of tuition or course fees paid by an employee for a course(s) that does not require an absence from work or only requires brief or short-term absences, provided that the employee has successfully completed the course(s). The employee expense claim must be supported by a receipt and a transcript.

In addition the CAO may authorize for that employee:

- leave of absence with pay for writing examinations;
- payment of the expenses of writing examinations; and
- payment of travel expenses at prevailing rates provided by the Travel Policy and Directives.

**11. ELIGIBILITY FOR BENEFITS**

Vacation and sick leave credits continue to accrue during a long-term or special educational leave and if the employee is on unpaid educational leave, vacation leave may be used to receive pay during part of the period of the unpaid leave.

The employee’s anniversary date of employment will remain unchanged by the granting of long-term or special educational leave.

Any merit increase due on an anniversary date which occurs during a period of long-term or special educational leave shall be postponed, but may be granted by the Department Head effective the first day of the month in which the employee returns to work.

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## 12. RESPONSIBILITIES

Employees: Take advantage of opportunities to develop individual potential to make fullest contribution to present and future job assignments. Make the organization aware of personal and professional goals.

Department Heads: Plan staff development activities to ensure immediate and long-term program requirements are met, consistent with the Municipality’s goal of continuous improvement in service to the public. Submit a human resource development plan to the Chief Administrative Officer annually.

Chief Administrative Officer: Ensures each department develops, implements and maintains a human resource development plan in the interests of improving individual and organizational performance and enabling employees to have reasonable opportunities to meet their career aspirations. Exercises authority over short term educational leave (30 days or less) requests upon recommendation from the Department Head. Make recommendations on all requests submitted to Council.

Municipal Council: Sets overall budget for human resource development. Reviews all Department human resource development plans recommended by the Chief Administrative Officer and must grant approval prior to implementation. Reviews all requests for long-term (more than 30 days) or special educational leave (usually extended programs of study) and grants approval; approves with conditions or modifications; or rejects such requests.

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**APPENDIX B  
Evaluation Guide  
Educational Leave and Assistance**

**Points**

**Relationship to Job Duties**

- 0 - Not useful or directly related
- 1 - Useful but not directly related
- 2 - Generally related to position/duties
- 3 - Specifically related to most duties/responsibilities

**Beneficiary**

- 0 - Exclusively employee or no perceived benefit
- 1 - Mostly employee
- 2 - Generally equal benefit
- 3 - Mostly organization

**Need**

- 0 - Not needed for minimum standards of job
- 1 - Employee needs in order to attain minimum education standards for present job
- 2 - Employee needs to maintain knowledge and/or learn new techniques
- 3 - New or career plan duties or responsibilities require such development

**Total**

**Guidelines:**

- |            |                                       |
|------------|---------------------------------------|
| 0-2 points | No leave or financial assistance      |
| 3-5 points | Unpaid leave, no financial assistance |
| 6-7 points | Up to 50% of salary and expenses      |
| 8-9 points | Up to 100% of salary and expenses     |