



**UNIVERSITY OF CALGARY** | Human Resources

---

# LEARNING & DEVELOPMENT GUIDELINES MANAGEMENT AND PROFESSIONAL STAFF

June, 2017

# CONTENTS

I.	Introduction.....	3
II.	Philosophy.....	4
III.	Guiding Principles.....	4
IV.	Eligibility.....	4
V.	Learning and Development Programs.....	4
VI.	Professional Dues and Membership Fees.....	4
VII.	Tuition Support Program.....	5
VIII.	Wellness Spending Account.....	5
IX.	Training Courses, Conference Registration Fees, and Travel.....	6
X.	Obtaining a Professional Designation.....	6
XI.	Roles and Responsibilities.....	7
XII.	Glossary.....	8
XIII.	Contact Information.....	8
XIV.	Appendix I: Proposal for continuing Professional Development.....	9

# I. Introduction

This document and its appendices have been prepared to provide information to Management and Professional Staff and Managers of Management and Professional Staff on the Learning and Development benefits supported by the University of Calgary.

This document contains detailed information to help facilitate consistent and effective decisions by Managers. Section XII provides a glossary of terms for reference purposes.

The Learning and Development Program is continuously monitored and periodically evaluated; ongoing recommendations will be made to ensure it continues to align with the University's strategic direction. Further expansion or refinement of these guidelines will occur as required.

Please note these Learning and Development Guidelines **apply only to Management and Professional Staff (MaPS)**. While the University of Calgary fully intends to adhere to the guidelines contained in this document, the statements and guidelines neither provide nor intend to establish strict procedures in all instances. Rather, they define intent and provide direction; they **are not and should not be considered a contract of any kind**, express or implied. Although the guidelines reflect current intended practice, they may be changed or rescinded at any time, at the University's sole discretion.

# LEARNING AND DEVELOPMENT PHILOSOPHY AND GUIDING PRINCIPLES

## II. Philosophy

The University of Calgary values and encourages employee learning and development. There are many programs and services which support the ongoing development of our employees.

Learning and development opportunities should align with the organization's goals and objectives and apply to the work-related requirements of an employee's role or support future career planning at the University.

## III. Guiding Principles

Specific underlying principles include:

- Activities are intended to enhance or upgrade the knowledge and skills of employees and hence their value to the University.
- Activities are the mutual responsibility of the University and the employee.
- Model is affordable and sustainable
- System provides fair and equitable access to funding across the organization
- Decisions are decentralized and are based on organizational guidelines and Manager's discretion
- Sufficient to attract, retain, develop and motivate key employees

The University also commits that programs will be administered in a way which is fair, consistent, and promotes equality of opportunity.

## IV. Eligibility

All Full time, Part time and Limited Term Management and Professional Staff are eligible for participation in the learning and development programs and reimbursements noted. Temporary Relief employees are not eligible to be reimbursed for learning and development expenses.

# UNIVERSITY-WIDE SPONSORED PROGRAMS

The University of Calgary sponsors many organization-wide programs for MaPS. The following programs and services are offered at no cost to the employee or department.

## V. Learning and Development Programs

There are many learning, leadership, wellness, and development programs and services offered by Human Resources and other units on campus. Many can be customized and scheduled to fit the needs of a particular group. Detailed information can be found on the Training & Development Website, <http://www.ucalgary.ca/training/>

## VI. Professional Dues and Membership Fees

Dues and fees which are relevant to an employee's area of work and position are eligible for one hundred (100%)

reimbursement from the Central Benefits Account up to a maximum of one (1) per calendar year. Temporary Relief employees are not eligible to be reimbursed.

Other dues or fees required for your job may be covered by a faculty/unit budget; please check with your supervisor. A third option may be to use your Wellness Spending Account, if you have one.

Employees receive reimbursement for professional dues and membership fees by completing the following steps:

1. Submit a General Expense Claim through PeopleSoft. Please refer to this reference guide for step-by-step directions: <https://www.ucalgary.ca/training/files/training/general-expense-claim-godirectly-to-exp-report-qrg.pdf>
2. Use the following chartfields:
  - Account = 60255
  - Fund = 10
  - Dept = 63045

## VII. Tuition Support Program

After six (6) months of continuous service in a benefit eligible position, MaPS are eligible to participate in the tuition support benefit program for academic and continuing education courses offered through the University of Calgary. Eligible dependents of MaPS may access the tuition support program for academic University of Calgary courses after the employee completes one (1) year of continuous service. Tuition support is pro-rated for Part-time employees.

Detailed information on eligibility and coverage through the Tuition Support Program can be found at [https://www.ucalgary.ca/hr/tuition\\_support\\_program](https://www.ucalgary.ca/hr/tuition_support_program)

## VIII. Wellness Spending Account

Employees who have allocated group benefit credits towards a Wellness Spending Account can use this to support continuous learning and career development expenses such as:

- Courses, conferences, and seminars
- Professional membership fees
- Software and books for professional development courses
- Transportation to courses or seminars
- Hotel accommodation, parking, and meals associated with professional development activities

More information on the Wellness Spending Account can be found at <https://www.ucalgary.ca/hr/maps-wsa>

# FACULTY/UNIT SPONSORED PROGRAMS

During annual budget preparations, departments may want to consider earmarking funds to support ongoing learning and development for their Management and Professional Staff, aside from the programs sponsored by the University of Calgary. Professional development that is funded by this **discretionary funding** must be relevant to the employee's role and is subject to financial limitations of the department/unit.

Learning and development opportunities may be provided for a group or an individual.

Individuals wishing to receive funding support for paid time off and/or the costs associated with training courses, conference registration fees and travel, or pursuit of a professional designation are required to submit a proposal to their Director or Senior Leader detailing the relevance of the request to their role (Appendix I).

Proposals are to be submitted as soon as possible and a minimum of thirty (30) days prior to the date of the course or conference. Exceptions can be allowed where reasonable justification is provided. All proposals will be assessed on a case by case basis and require approval by the appropriate Senior Leader of the department/unit.

Where training has been funded by the department/unit, staff members should be required to share their learning experience with their peer group.

## IX. Training Courses, Conference Registration Fees, and Travel

Training courses that are relevant to an employee's current job or future career aspirations may be eligible for paid time off and reimbursement of costs. It is expected that University of Calgary courses eligible for tuition support will be considered first if they address the identified development needs. Where staff members are enrolled in a course that takes place outside of normal work hours, this is understood to be personal time.

For training that is not job related, employees should request the time off as a vacation day or personal leave day.

A MaPS employee may be approved to attend a work-related conference. The registration fees and associated travel costs may be a reimbursable expense by the employee's department.

A conference schedule should always be included when reimbursing for conference travel. Employees receive reimbursement by submitting a General Expense Claim through PeopleSoft. Please refer to this reference guide for step-by-step directions: <https://www.ucalgary.ca/training/files/training/general-expense-claim-godirectly-to-exp-report-qrg.pdf>

## X. Obtaining a Professional Designation

It is assumed that any necessary formal education has been completed prior to applying for or beginning study for a professional designation. In situations where a degree needs to be completed or courses need to be updated, the University's Tuition Support Program can be utilized to offset the cost of the courses.

Once enrolled in a pre-approved professional designation program, course and/or exam fees will be reimbursed once proof of successful completion has been submitted. This type of reimbursement is charged through the employee's department. Employees receive reimbursement by submitting a General Expense Claim through PeopleSoft. Please refer to this reference guide for step-by-step directions: <https://www.ucalgary.ca/training/files/training/general-expense-claim-godirectly-to-exp-report-qrg.pdf>

If successful completion is not achieved, the costs are the employee's responsibility. Costs for optional preparation classes, books, texts, software, etc. are not eligible for reimbursement.

After successful completion of a professional designation through department sponsorship, an employee is required to complete two (2) years of service. If the employee leaves the University's employ prior to completion of the required two (2) years of service, the fees will be recovered on a pro-rated basis as follows:

- Employee leaves prior to completing designation - 100% of fees will be paid back
- Employee leaves less than twelve (12) months after completing designation - 67% of fees will be paid back
- Employee leaves twelve (12) to twenty-four (24) months after completing designation - 33% of fees will be paid back

The Director or Senior Leader of the department/unit is responsible for notifying Payroll in Financial Operations to coordinate the recovering of fees paid prior to the employee's last day worked.

Employees pursuing a professional designation as supported by the University of Calgary will be entitled to paid days off as follows:

- ½ day off for final course exams
- 1 day off for study prior to writing final professional exam

## XI. Roles and Responsibilities

Governance of the University of Calgary's Learning and Development program is the responsibility of the Board of Governors. Management of the program is a responsibility of the Executive Leadership Team with support from Human Resources:

- **President and Vice-Chancellor**
  - Approves the overall Learning and Development framework
  - Approves changes to guidelines
  - Approves University sponsored learning and development budget
- **Senior Leadership Team**
  - Recommends changes to guidelines
  - Approves department sponsored learning and development activities
  - Manages the cost within the approved financial budgets
- **Human Resources**
  - Provides strategic support and direction to the University concerning Learning and Development Program guiding principles and best practices
  - Monitors and evaluates the effectiveness of the Learning and Development Program
  - Regularly surveys practices in the University sponsored programs to ensure continued alignment with the University's goals and objectives
  - Maintains a current and relevant learning and development program calendar
  - Provides group-specific support where requested
- **Manager**
  - Identifies and prescribes learning and development required for an employee's current role
  - Supports employees in pursuing development opportunities relevant to their career goals
- **Employee**
  - Determines and articulates their desired career path, required skills, and relevant training
  - Tracks their own professional development hours and ensures compliance with their professional association's professional development requirements, as applicable

## XII. Glossary

- Discretionary Funding: Funds which are available or earmarked in a faculty/unit approved budget.
- University-wide: Applies to all faculties/units operating within the University of Calgary
- Work-related: Connected to a defined set of job responsibilities

## XIII. Contact Information

For any questions, please contact your Human Resources Partner or Advisor: <https://www.ucalgary.ca/hr/about/hr-services>



#### XIV. Appendix I: Proposal for continuing Professional Development

### TO BE COMPLETED BY APPLICANT

<b>Staff Member Name</b>	Click here to enter text.
<b>Dates(s) of Training</b>	Click here to enter text.
<b>Course/Conference name and/or Number</b>	Click here to enter text.
<b>Location of Training</b>	Click here to enter text.
<b>Total Estimated Cost of Training</b>	Click here to enter text.
<b>Course/Conference Fee</b>	Click here to enter text.
<b>Travel</b>	Click here to enter text.
<b>Accommodation</b>	Click here to enter text.
<b>Meals/Other (Please Specify)</b>	Click here to enter text.

**Skills training will enhance**

Click here to enter text.

**How training will be shared with peer group**

**(ie: Lunch & Learn, Presentation at Staff Meeting, Article for Newsletter, etc)**

Click here to enter text.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# TO BE COMPLETED BY DIRECTOR OR SENIOR LEADER

<b>Approved (Y/N)</b>	Click here to enter text.
-----------------------	---------------------------

**Costs that will be reimbursed / Payment arrangements**

Click here to enter text.
---------------------------

**Reason for not approving (if applicable)**

Click here to enter text.
---------------------------

*Follow-up*

<b>Knowledge-Sharing Completed (Y/N)</b>	Click here to enter text.
--	---------------------------

Approver's Signature: \_\_\_\_\_ Date: \_\_\_\_\_