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AU 1150 Learning and Development Requests

1.0 PURPOSE

Interior Health (IH) promotes employee learning and development to support safe, quality care. Employees are encouraged to enhance their knowledge and skills related to their current or future role within the health authority based on an established learning plan.

IH recognizes that training, development and associated costs are the responsibilities of both the employer and the employee. Any funding allocated will be subject to organizational need, the terms of the collective agreements / contracts and the available budget (e.g. department /program).

Interior Health strives to provide fair and equitable access to education funding to all employees. This policy includes physicians who are salaried IH employees (excludes fee for service, service contract and sessional physicians).

2.0 DEFINITIONS

TERM	DEFINITION
Beneficial Learning	Education that supports and enhances the employee's ability to do their job.
Competency	The knowledge, skills, judgment, and behaviour associated within role requirements.
Education / Learning	Synonyms that define the process of receiving or giving instruction, the process of gaining knowledge.
External Education	Education events offered by external providers. Education events outside of Interior Health (may include conferences).
Designated Approval Body	The individual or group with the authority to approve learning and development requests. This may include but not limited to a Manager, Executive Medical Officer, Professional Practice Lead or an Education Committee.
Internal Education	Education events offered by Interior Health. Education events within Interior Health.
Learning Plan	A formal document that defines the learning and development goals of the employee. This may include professional development, training, required learning or individual competency maintenance (practice review).

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	The learning plan is for the individual employee and is completed by the employee. The Manager is not responsible for completion but will utilize the learning plan in approving education requests and within the IH performance management process.
Operational Learning	Education on best practices or innovation that will influence operations. Typically engages management positions. Examples include LEAN, Quality Academy.
Professional Development	Those education programs/courses (internal or external) that are directly related to ongoing or enhancing professional competence or career advancement and are related to a specific professional discipline. Professional development encompasses all types of facilitated learning opportunities.
Required Learning	Education required by the employer and/or licensure, and or contractual negotiation (e.g. neonatal resuscitation, WHMIS, Nurse Practitioner service agreement). Includes employer assigned attendance at conference for operational learning.
Specialty Education	Formal education programs above entry-level requirements (i.e. critical care course, renal, cardiac ultrasound).
TEER	Travel Education Expense Requisition form.
Training	Those activities that provide an employee with the additional skills needed to do their job. Examples include computer application programs, electronic mail, ordering of supplies, documentation of care, program specific preparation.

3.0 POLICY

- 3.1 If applying for financial assistance related to a Learning or Development opportunity, the employee will have a learning plan. (HYPERLINK and example in [Appendix A](#)) This learning plan is the responsibility of the individual employee and not the manager.
- 3.1.1 It is recommended that employees develop a learning plan, update as necessary and review/renew it annually.
 - 3.1.2 Educational goals will be identified by the individual employee with input from the manager and or designate. The goals may link with the IH performance management process or professional licensure requirements.
 - 3.1.3 Collaborative planning is encouraged between the staff member and their manager to ensure appropriate learning needs are addressed.
- 3.2 Support for courses should be offered in the following priority: local, geographical area, health authority, provincial and then national/international.
- 3.3 The Physician Continuing Medical Education (CME) is a separate education program as subject to the terms of the Physician Master Agreement. The CME program is intended to support physician education as part of their ongoing licensure requirements. All other learning and development needs (e.g. management skills, leadership development) should be considered through the processes within this policy.

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- 3.4 Internal expertise for education will be utilized before accessing external providers.
- 3.5 All employees will complete a [Request for Educational Opportunity \(Appendix B\)](#) and submit to their designated education approval body (manager, education committee) for any education opportunity with associated costs. Internal-department / unit specific education available while on duty/shift are not included in this process.
- 3.6 Expenditures for learning and development are categorized as required or beneficial.
 - 3.6.1. Required Learning - the employer will pay full salary for any scheduled work days, plus all reasonable expenses including accommodation, meals and transportation (IH Travel Expense Policy [AU0300](#)).
 - 3.6.2. Beneficial Learning - the employer will consider reimbursement in keeping with collective agreements, operational budgets, and the Funding Formula below.
 - 3.6.3 Beneficial Learning – Post / Graduate studies. At the discretion of the Vice President, and within the unit/department budget allocation, post-graduate / career or professional development support may be provided. Examples may be a portion of tuition or a paid education leave. Pre-hire job qualification requirements are excluded.

Table 1: Funding Formula

Educational Opportunity	Reimbursable Expenses				Wages
	Tuition	Travel	Accommodation	Meals	
Required Operational	100%	100%	100%	100%	100%
Beneficial	Up to 50%	Up to 50%	Up to 50%	Up to 50%	Up to 50%*

* give a day/take a day, no overtime if possible (rebook to another date)

- 3.7 Out of the province education requests require the approval of the portfolio Vice President as per [AP 0300 Travel Policy](#).
- 3.8 Significant investment in education requires a commitment of the recipient:
 - 3.8.1 Any educational opportunities over \$600 will require the applicant to sign an Education Reimbursement Agreement document which reflects repayment of service/funding to the amount of the education event ([Appendix C](#)) if the applicant has dropped out, cancelled or failed to complete the requirements of the opportunity / course without due notice or reason.

This includes leaving IH before the term agreement of one or two years:
 - 3.8.2 In addition to 3.7.1, any educational opportunity exceeding \$600 and up to \$5,000 will require a commitment of the staff member to 1 year service within the Health Authority, commencing when education is completed.

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3.8.3 In addition to 3.7.1, any educational opportunity over \$5,000 will require a commitment of the staff member to 2 years' service within the Health Authority, commencing when education is completed.

The signed reimbursement agreement will be forwarded to Employee Services to be placed on the employee's file.

- 3.9 Any fees paid or owed due to applicant cancellation, may be assigned to the applicant, pending examination of the reason for cancellation by the designated approval body.
- 3.10 Successful financial reimbursement will depend on timely application. Incomplete applications will be returned and may result in missed deadlines. Reimbursement may require evidence of attendance and successful completion of the event. The designated approval body will respond to/process Requests for Education/Reimbursements within two weeks of receiving.
- 3.11 Education Reimbursement (per [TEER Form NO.807000](#)) must be submitted to the designated approval body within 30 days of the event and within the fiscal year it was budgeted (no later than March 15th) for consideration. Any forms that come after the fiscal close will not be accepted.
- 3.12 Staff engaged in established Interior Health Education programs (e.g. Next Generation Clinical Leadership, Educators' Pathway, Talent Management, Specialty Education) will adhere to the specific processes outlined within that program.
- 3.13 In extenuating circumstances, the Vice-President of Human Resources may vary the application or terms of this policy and fully disclose the exception to the Senior Executive Team.

4.0 PROCEDURES

4.1 Employees

4.1.1 Employees considering or requiring education/training should:

- Review their individual learning need(s) plan and discuss with their Manager. This may include a second Manager if considering specialized education opportunities.
- Review local and health authority wide education event calendars; discuss with clinical educator/resource individuals; actively search for event/programs that will meet identified educational needs.
- Promote the culture of learning by sharing their learning with fellow staff members.

4.1.2 When applying for Educational funds, employees must complete the Request for Education document and follow process steps outlined within the Learning and Development Request Policy Guide.

4.1.3 All staff attending a selected educational opportunity are required to adhere to the IH Standard of Conduct ([AU0100](#)).

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4.2 Designated Approval Body

4.2.1 When evaluating requests for all learning events consider:

- If attendance at the requested learning event is required in order to continue the operation of the unit/department within accepted clinical standards (e.g. operationally mandatory).
- If attendance at the requested learning event is required for ongoing certification of an individual's position.
- How the learning opportunity contributes to or allows the individual to meet, a stated objective within their formal Learning Plan (e.g. beneficial).
- If the learning opportunity being considered is the most cost effective way to gain the knowledge/information that will be provided (consider not just the cost of the course/opportunity itself, but also travel/accommodation/backfill).

4.2.3 Apply the Funding Formula (see [Table 1](#)), follow the [Travel Policy](#) and any other applicable policies or mandates.

4.2.4 Provide an opportunity for the attendee to present their newly acquired knowledge or skill to other staff members as applicable (e.g. staff meetings, in-service opportunity)

5.0 REFERENCES

Health Service Area Education Leads, 2007 – 2008

Interior Health Authority. (2004). Kelowna General Hospital Administrative Policy AC060.

DEVELOPED BY:

2008: Dr. Abdul-Salem (EK/KB Education) Monica Adamack (Professional Practice Office) Deb Austin (KB Education) Linda Comazzetto (TCS Education) Karen Skillings (TCS Education, with clinical educators).

REVISED BY:

2016: Monica Adamack(Professional Practice Office) Leslie Bryant-McLean (Community Integration) Mona Hazel (Residential Services), Lane Sherman/Juanita Yuill (Transformation, Innovation and Change) Jennifer Steida, (Quality and Safety), Kathy Williams (Allied Health, Professional Practice Office).

REVIEWED BY: LS Steering Committee, LS Advisory Committee

ENDORSED BY: 2008 Brenda Redman, COO Human Resources
2016 May, Strategic Risk Management Committee
2016 July, Senior Executive Team
2019 Jan, Strategic Risk Management Committee

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APPENDIX A: Learning Plan

LEARNING PLAN for Name: _____ Date: _____

- What do I need to learn to maintain the knowledge, skill and judgment requirements within my role (beneficial)? Refer to competency tools, job descriptions, roles and responsibility documents.
- What required education do I need to complete this year?
- What career path objectives do I need to consider?

Learning Goals	Learning Methods	Timeline	Evidence the Goal has been met	Date/Initials

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APPENDIX B: Request for Education
OBTAIN ACTUAL FORM FROM DOCUMENT SERVICES

[FORM # 807277](#)

Part I

Please print clearly. All fields must be completed or the request will not be processed in a timely fashion. Follow the Learning and Development Request Policy (AU1150) and Travel Policy (AP0300) during completion of this form.

EMPLOYEE INFORMATION		
Employee Name		Mnemonic
Employee Number	Facility	Department/Unit
EDUCATION REQUEST		
Course/Event:		
Location		
Dates of event	Hours of attendance	
Dates of travel	Hours of travel	
This is (<i>pick one</i>) <input type="checkbox"/> Required Learning <input type="checkbox"/> Beneficial Learning <i>Complete Part 2 - Justification on the reverse of this document.</i>		
To attend the above education, I need (<i>select from below</i>) for the following dates and times.		
<input type="checkbox"/> Planned Leave		
<input type="checkbox"/> Off duty payment		
<input type="checkbox"/> Switched Shifts		
FUNDING (final reimbursement will be based on submitted TEER forms)		
ITEM	TOTAL ESTIMATED COST	FUNDING APPROVED
Tuition/Registration		
Course Material / Textbooks		
Travel (vehicle, airplane, bus)		
Accommodation*		
Meals*		
APPROVAL / DENIED		
<input type="checkbox"/> Approved	COST CENTER:	
<input type="checkbox"/> Denied		
RATIONALE:		

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Manager Name	Manager Signature
VP Name	VP Signature

*Do not exceed allowable maximums per Travel Policy.

PART 2 - JUSTIFICATION

To assist you in justifying your learning opportunity request, please complete the following questions, attach to your learning opportunity request form and give the package to your manager.

Employee Name	Departmental Affiliation
Contact Information	Manager Name
Learning Opportunity (please also list other learning opportunities you've had in the past 12 months)	
What is the relevance of this learning opportunity to your current work? How does it apply to your desired career path?	
Describe the learning outcomes expected from this learning opportunity. How will this opportunity change/adjust your practice?	
How does this learning opportunity align with the IH Strategies Goals and Objectives?	

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How will you share the learning outcomes of this opportunity within Interior Health? (Some options include: lunch and learn presentation, development of a webinar or in-service learning opportunity for colleagues, write up for communications, etc.) Please note that managers are to negotiate this with the requestor and record the agreed upon commitment here.

Where and how will you implement the knowledge from this learning opportunity?

APPENDIX C – Education Reimbursement Agreement

OBTAIN ACTUAL FORM FROM DOCUMENT SERVICES

FORM No. 807428

EDUCATION PARTICIPANT: *This document affects your legal rights and liabilities. Please read carefully.*

NAME (please print): _____

I have read and understand the Learning and Development Request for Education Policy (AU 1150) and the accompanying Guide.

IT IS UNDERSTOOD AND AGREED that should I withdraw from the education program after the penalty free withdrawal/registration date or fail to complete, I will repay the unit/department/program who supported me, the amount of the tuition and textbook awarded me. I will not receive any compensation for my contact (study) time.

IT IS UNDERSTOOD AND AGREED that should I resign from service or leave the province of British Columbia prior to the terms listed within the Education policy, I will repay the amount of the registration/tuition and resource material/textbook awarded me as per provincial collective agreements or health discipline specific contractual requirements and

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