

Learning and Development Request Policy Guide

Introduction

This guide is an extension of Interior Health Authority (IH) [AU1150](#) Learning and Development Request Policy. It is designed to provide essential information for persons engaging in IH education processes.

As stated in AU 1150, IH promotes employee training and development to support safe, quality care. Educational opportunities help support positive learning environments, retention and job satisfaction. 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 and the organization's ability to pay.

LEARNING PLAN

Interior Health Education personnel adhere to the principles of adult learning. Research findings acknowledge that the reasons most adults enter any learning experience is to create change. This could encompass a change in their (a) skills, (b) behavior (c) knowledge level or (d) attitudes (Adult Education Centre, 2005). Factors that impact learning for adults include: motivation, the amount and type of previous experience, the level of engagement in the learning process and applicability of the learning.

All IH employees are encouraged to develop a learning plan which will provide assistance to the manager in understanding the learning needs of their staff. In addition, a collection of unit / department learning plans will provide Education personnel with an opportunity to plan learning sessions more effectively.

How to complete a Learning Plan:

Staff should examine their role responsibilities during their probationary period and then annually review their learning plan, utilizing job description and or competency tool reviews. This may be in conjunction with professional regulation requirements (licensing). By creating a learning plan, employees are more committed to achieve the goals listed on the plan. The plan can be used in conjunction with performance management processes.

Employees are asked to complete a learning plan, save to a personal folder and share with their education designate and manager. The purpose of sharing the plan is to collaboratively discuss options to help achieve identified learning goals.

Employees should ensure they have logged their attendance at an education event in their learning plan.

EDUCATION OPPORTUNITIES

Learning opportunities can come in a variety of ways. For example: reading an article, practicing in a simulation lab, engaging in an in-service, taking a course or attending an event such as a conference, seminar or workshop.

- To be fiscally responsible, internal education opportunities should be considered over external ones. Education personnel have lists and resources to locate internal education opportunities.
- There are many subject matter experts within IH, which should be accessed prior to the use of consultants or presenters outside IH.
- Any education outside of the province, must be approved by the Vice-President of the portfolio.

Once a learning opportunity has been recognized and fits within the learning plan, employees must complete a Request for Education Opportunity form.

How to complete a Request for Education Opportunity

All employee fields must be completed prior to submitting to the designated approval body. Incomplete forms will be returned to the employee which may delay decisions. The form includes two parts: Request for Education which describes the education opportunity and justification which provides rationale for the request.

Request for Educational Opportunity: [Form # 807277](#). Educational expenses can include registration, tuition, resource material (textbooks) and associated travel (accommodation, flights, car rental, parking).

Submissions will not be considered retroactively (courses that have already happened).

CAREER PATHS

Career paths are routes or a process used by an employee to chart a course within an organization for his or her career. It may include one job or a series of jobs, and refers to the growth of the employee over time within the organization.

Within Interior Health there are two main pathways: clinical or non-clinical. In a clinical pathway, employees enter the workforce with entry level healthcare education. They may remain within this area of focus but progress through the multiple facets of patient care: Surgical to Critical care, Home Health to the Renal program, Radiology to Ultrasound, Respiratory Therapy to the Operating Room. A non-clinical pathway also has various opportunities: Laundry Services to Food preparation, Administrative assistant to Executive assistant, Research and Leadership Management.

Interior Health promotes staff development. A conversation with a manager or an education designate is encouraged to assist in the determination of a career path.

- Advanced education**
 Employees interested in advancing their education beyond role requirements are encouraged to connect with their manager or education personnel for information. This may include but is not limited to career changes (e.g. Licensed Practical Nurse to Registered Nurse) or career enhancement (e.g. Master’s Degree). Supporting such opportunities will depend on operational capacity.
- Specialty education**
 Interior Health supports employees in obtaining education in specific areas of focus that require additional education above entry level competency. Please see the [Specialty Education](#) webpage for additional information.
- Leadership Talent Management**
 Interior Health continually advocates for succession planning. The Leadership Talent Management is a process of creating a talent pool of qualified individuals. In addition the program develops individual competencies for these key positions. Individuals are selected by their Senior Leadership team to participate in the [Leadership Talent Management](#) program. Interested employees are encouraged to contact their direct Manager for discussion around performance and criteria to be nominated.
- Leadership and Development**
 The Organization and Leadership Development department at IH is responsible for developing and delivering programs and services centered around team development, professional and personal growth. Please see the [Pathways to Leadership](#) .
- Specific Program/Department Opportunities**
 Connect with the manager or education personnel for specific educational opportunities within the department/unit (e.g. Quality Academy, Executive Leadership, Instructor Development, Code White Training)

FUNDING FORMULA

Interior Health has a finite budget and must be fiscally responsible of taxpayers’ contribution to healthcare. As such, a defined funding formula for education has been created. For Required education, IH will cover 100% of the expenses. For Beneficial learning, IH will cover up to 50% of the expenses.

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

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

CONFERENCES

Conferences are defined as an event at which there are groups of talks on a broad subject. The talks are provided in presentation styles (often the sharing of the speakers perspectives rather than evidence informed data) rather than traditional learning formats (e.g. classrooms, e-learning)

All conference requests must be fully justified, with details of the sessions the individual plans to attend and specifically how each chosen session will align with components of the learning plan. The designated approving body is responsible for determining whether the justification is sufficiently aligned with the employee's learning plan.

Points for a Manager to consider:

- Budget allocation for the year / return of investment
- Time available considerations
- Benefits of attending conferences for the whole team and or the portfolio.
- Benefits for recruitment and or long-term investment.
- The individual has met all objectives in their yearly performance reviews
- Is the purpose of the conference well defined?
- Is the conference of good quality (e.g. speakers, agenda, association)
- Does the targeted audience match the employee?
- Is the top benefit of attending the conference a networking value?

To organize an Interior Health conference, please refer to [Administrative Policy AU 3000](#) Conferences.

VICE-PRESIDENT APPROVAL

Out of the province learning and development requests (which include conference attendance) requires the endorsement of the portfolio Vice President. The application for this opportunity must include a completed Request for Education form, including justification of the education opportunity, and manager approval prior to submitting the form for final authorization to the Vice-President.

REIMBURSEMENT REQUIREMENTS

Significant investment in education requires a commitment of the recipient and therefore, any educational opportunities over \$600 will require the applicant to sign an Education Reimbursement Agreement document. This document reflects repayment of service/funding to the amount of the education event if the applicant has dropped out, cancelled or failed to complete the requirements of the opportunity / course without due notice or reason.

In addition, any educational opportunity of \$5000 - \$10,000 will require a commitment of the employee to 1 year service within the Health Authority, commencing when the education is completed.

Any educational opportunity over \$10,000 will require a commitment of the employee to 2 years of service within the Health Authority, commencing when education completed.

How to complete a [Reimbursement Agreement](#)

Read the form in its entirety and ensure you understand the requirements. This is a contract agreement between you and Interior Health which carries significant commitments. Print clearly your name, IH

mnemonic and employee number. Sign and date the document. Submit with your Request for Education form.

EDUCATION REIMBURSEMENT

Employees will be reimbursed for expenses associated with their education opportunity as per the funding formula (Table 1). Employees are required to complete a Travel Education Expense Requisition ([TEER Form NO. 807000](#)). The IH [Travel Policy AF 0300](#) applies.

Expenses must be submitted within 30 days of event. Year-end financial policies/mandates apply to education opportunities.

How to complete a TEER form

1. Complete the personal information at the top of the form.
2. Enter the education event you are seeking reimbursement for. For example: BCIT NSCC 7150, Provincial conference Our Future Healthcare System, IH Diabetes Workshop.
3. Enter the date or date range of the education opportunity.
4. Record amounts to be reimbursed according to the section titles.
 - a. For mileage, please use the i-Site claim process. Gas expenditures cannot be included if claiming mileage.
 - b. For staying with family or friends, claim IH Travel policy amount. In the comments section, provide location of stay.
 - c. Total the amount.
5. Attach detailed receipts.
6. Sign the bottom left box indicating the information is correct.
7. Submit to your manager or designate for approval signature. Ensure manager forwards to VP as necessary.
8. Reimbursement is linked to payroll. The value of the reimbursement is recorded in the second section of the pay stub and is not included in taxable income.

KNOWLEDGE TRANSFER AND SHARING

To enhance Interior Health's culture of learning, employees are encouraged to share their education experience and learning opportunities with others. Employees should actively seek out opportunities to share their experience with new employees in preceptor or mentorship roles. In addition, employees will be accountable for bringing newly acquired knowledge back to their workplace and sharing with colleagues. Managers will ensure that there are opportunities for such sharing of new learnings.