|  |  |
| --- | --- |
| Operating ProcedureCanada and Bermuda Territory | **N:\A - Personal\Locker\Personal\Pictures\Graphics\SA\Shield & Crest\SA_GivingHopeToday_red_hor_lrg_rev_black.jpg** |
| **Procedure:** | Application - Training |
| **Policy:** | Education and Training | **OP Number** | SR 05.001 |
|  |

1. **The Training Application process is as follows:**

Step 1: Expression of Interest

Personnel who are interested in applying for training support should initiate a discussion with their immediate supervisor so their supervisor is aware of their interest and can indicate if they will be supportive of their application.

Step 2: PEAC Development Plan

The applicant’s PEAC development plan should clearly indicate how the desired training will support the achievement of the applicant’s development goals, enhance LEADS capabilities, and provide a direct, positive impact on current role’s responsibilities. A copy of the applicant’s current PEAC development plan is required for submission along with the application.

Step 3: Application Submission

The applicant will fully complete the Agreement - Education & Training Form and the Application - Education and Training Form and submit both to their immediate supervisor for consideration and endorsement.

Individual MU's, DHQ's, and departments may have additional review and endorsement steps that they require before forwarding applications to THQ leadership development department (LDD) for review.

Step 4: Application Consideration & Review

Supervisor endorsed applications are forwarded to the LDD secretary, where approval is considered.

1. **Completing the Application Training Form**
	1. If costs are $1,500 or less per instance:
		1. The supervisor will review the application and if it meets the criteria of the OP education and training, and the requirements of OP staff expense, the supervisor will sign in the designated area indicating their endorsement and approval of the application - copy placed in the applicant’s personnel file, copy forwarded to the LDD secretary (for information only).
		2. The supervisor will ensure that funds have been allocated for this training in the MU/DHQ/Department’s current budget.
		3. The applicant will be informed in writing if their application has been approved/not approved - copy to the applicant’s personnel file. If approved, the applicant will take the next steps to secure enrollment.

NOTE: LDD funds are not available for training costs are less than $1,500

* 1. If costs are greater than $1,500 per instance:
		1. The supervisor will consider the application, and if it meets the criteria of the OP education and training and the requirements of OP staff expense, the supervisor will sign in the designated area indicating their endorsement of the application, and forward to the LDD secretary for consideration.
		2. The LDD secretary will sign in the designated area, indicate in the appropriate checkbox, either "Approved" or "Not Approved," and return a signed copy to the applicant's supervisor.
		3. If not approved, an explanation will be provided in the designated area of the education application form.
		4. The supervisor will ensure a copy of the application is placed in the applicant's personnel file. The LDD secretary will ensure information is entered into LDD database, and a copy of the application is filed at LDD.
		5. The supervisor will inform the applicant in writing that their application has been approved/not approved - copy to the applicant's personnel file. If approved, the applicant will take the next steps to secure their enrollment.
1. **Payment processing for approved applications:**
	1. If payment is from the applicant’s MU/DHQ/Department, the supervisor will give direction to the applicant about how payment will be processed.
	2. If payment is from LDD, the applicant will process for reimbursement through the travel and expense management system (TEM), which includes scanning and submission of all relevant receipts/invoices.
	3. Payment/reimbursement by TSA will only be provided for expenses that the applicant has listed in the training application.
	4. Reimbursement for training costs must be submitted at the commencement of the course.
	5. No reimburse shall be granted in cases where the individual has failed to attain a passing grade in the course or where the individual has withdrawn from the course.
	6. Processing of all receipts must meet the requirements of OP staff expense. The applicant is responsible for submitting invoices and receipts through TEM within one (1) month to receive reimbursement or payment. This includes receipts of travel, meals, accommodations, texts, and course fees.
2. **Travel Costs**
	1. Due to the high cost of travel, transportation expenses relative to course attendance will be approved only when completion of on-site courses is essential to meet the residency requirements established by the institution from which the degree is being sought. Additional travel for study purposes may, however, be approved where it can be demonstrated that a course (or courses) required for degree completion is not available through any other means than on-site attendance. Where possible, individuals are encouraged to engage in distance learning options (e.g. online courses) to minimize course costs.
3. **Record Keeping**
	1. Upon completion of the training program, the individual’s supervisor is responsible for ensuring a copy of the training certificate, and any associated transcripts, are processed as follows:
		1. For Employees:
		* Copies of certificate and transcript are placed in the individual’s personnel file be that in the MU, at DHQ, or at THQ
		* Copies of certificate and transcript are forwarded to LDD secretary for all training funded by LDD
		1. For Officers:
		* Copy of certificate and transcript are forwarded to LDD secretary for all training funded by LDD. The LDD secretary will ensure information is recorded in the OMS database, and copies are placed in the officer’s personnel file.
4. **Repayment Requirements**
	1. It is understood that training is an investment The Salvation Army (TSA) makes in its personnel. If an individual (employee or officer) chooses to end their working relationship with TSA in less than 36 months from the date of their training program completion/graduation, either through resignation or early retirement, the individual will repay to TSA the costs of their program (text, tuition, course fees) on a pro-rated basis.

Example:

Program Cost: $5,000

Graduation Date: Jul 1, 2015

Resignation Date: Jun 31, 2017

Months Worked post Training Completion: 24 out of 36

Repayment to TSA : 24/36 x $5,000 = $3,333

* 1. The individual is required to reimburse TSA for the pro-rated payment amount and will be given two years (24 monthly installments) to make full restitution, commencing 30 days from the date of separation from TSA. The individual has the option to pay off the balance owing in less time than two years or to clear the full amount in a single lump-sum payment.
1. **Early Withdrawal or Non-Completion of Training Program**
	1. TSA will take all reasonable steps to support individuals who are involved in training programs. However, should an individual withdraw from a training program, or receive a grade of “incomplete” or “fail,” their training program will be suspended, and their application will be reviewed. The outcome of that process may result in the individual resuming studies or the suspension of further course/program involvement.
	2. Withdrawal or failure to complete the training course(s) may require the applicant to fully reimbursement all costs to TSA

**Approved by:**

Territorial Management Board

Canada and Bermuda Territory

**Only the electronic version of this OP Procedure is official and current.**

|  |
| --- |
| **Document Control Information** |
| **Policy:** | Education and Training |
| **Office of Oversight:** | Leadership Development |
| **Created Date:** | 26 May 1999 | **Next Review Date:** | 05 Aug 2022 |
| **Document History** |
| **Version** | **Date Revised** | **Summary of Changes** |
| V-01 | New |  |
| V-02 | 05 Aug 2020 | Inclusion of PEAC requirements, update to process |