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| 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 - Leadership Development |
| **Policy:** | Education and Training | **OP Number** | SR 05.001 |
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1. **Program Categories**

There are two (2) categories of programs offered specifically for developing leaders:

* 1. ARROW Leadership Program:
		1. Offered by invitation only at the sole discretion of the leadership development department (LDD) in consultation with the individual’s supervisor and the endorsement of the territorial training and education council;
		2. Criteria for selection for the ARROW leadership includes all elements as described in the criteria section of OP education and training, as well as the following additional criteria:
* Consistent leadership development evidenced through the achievement of PEAC development goals
* Minimum of ten years of service/employment
* Minimum of five years’ experience and success in mid-level management roles, generally defined as roles where an individual leads the overall management of a complex organizational unit or process. These roles are broad in nature, with implications affecting multiple departments/ministry units.
	+ 1. Individuals identified for the ARROW leadership program will be engaged in discussions with their immediate supervisor and the LDD secretary to determine if the ARROW leadership program will be a good fit for both the individual and TSA.
		2. After the individual has received a formal invitation from LDD for the ARROW leadership program, the individual will complete the leadership development application form as well as the education and training agreement form and forward to their immediate supervisor.
		3. The supervisor will sign in the designated area, indicating their endorsement of the application and forward both forms to the LDD secretary for final consideration and approval. If approved, the LDD secretary will sign in the designated area indicating approval, ensure information is entered into the LDD database, and return a signed copy to the applicant’s supervisor.

NOTE: Applications from THQ departments will be sent directly to the LDD secretary once endorsed by the applicant’s supervisor.

* + 1. If not approved, an explanation will be provided in the designated area of the leadership development program application form.
		2. The supervisor will inform the applicant in writing if their application has been approved/not approved - copy to the applicant’s personnel file. If approved, the applicant will work with the LDD to process the required steps to secure their enrollment.
	1. Executive Coaching:
		1. Offered by invitation only at the sole discretion of the LDD in consultation with the individual’s supervisor and the endorsement of the personnel secretary. Coaching programs may include some or all of the following elements

360 LEADS Review Debrief:

* Completed by all individuals who are moving into mid-level leadership roles, e.g. large social services units, area commanders, DSBA, DYS, DSPRD, DC, THQ department heads, and Cabinet, within the first six months of their new role

Performance Coaching:

* Support provided by a certified coach to assist individuals in mid-level leadership roles to improve performance, navigate change points, and strengthen leadership capabilities

Executive Coaching

* Support provided by a certified coach to assist individuals as they move into senior-level leadership roles, e.g. DC, THQ department heads, Cabinet within the first 12 months of their new role
1. **The Leadership Development Program Application process is as follows:**

Step 1: Expression of Interest

Personnel who are interested in applying for leadership development program 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 the application.

Step 2: PEAC Development Plan

The applicant’s PEAC development plan should clearly indicate how the desired program will support the achievement of the applicant’s development goals, enhance LEADS capabilities, and provide a direct, positive impact on current role 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 education and training agreement form and the application - leadership development 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 they forward applications to the LDD secretary for review.

Step 4: Application Consideration & Review

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

1. **Completing the Application Leadership Development Form**
	1. If the application is for a program involving a number of courses taken over a period of time, the initial application will refer to the entire program of studies.
	2. The supervisor will review the application and if it meets the criteria of the education and training OP, and the requirements of staff expense OP, the supervisor will sign in the designated area indicating their endorsement and approval of the application.
	3. For MU’s and DHQ applicants, the supervisor will forward the application they have endorsed to the LDD secretary for consideration and approval.
	4. For THQ department applicants, the application will be sent directly to the LDD secretary once endorsed by the applicant’s supervisor.
	5. 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.

If not approved, an explanation will be provided in the designated area of the leadership development program application form.

* 1. 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 in the LDD.
	2. 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. **Additional Program Courses**
	1. Once the leadership development program application has been approved for a full program, additional courses and associated expenses required to complete the program are processed by the applicant completing the application - additional course form. This additional form is needed so payment can be tracked and processed in a timely manner and to ensure LDD is kept aware of the individual’s education program progress.
	2. The LDD secretary will approve the form and process for payment.
2. **Payment processing for approved applications:**
	1. The applicant will process for reimbursement through the travel and expense management system (TEM), which includes scanning and submission of all relevant receipts/invoices.
	2. Payment/reimbursement by TSA will only be provided for expenses that the applicant has listed in the training application.
	3. Application for tuition reimbursement must be submitted at the start of the program.
	4. 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.
	5. Processing of all receipts must meet the requirements of the staff expense OP. The applicant is responsible for submitting invoices and receipts within one month to receive reimbursement or payment. This includes receipts of travel, meals, accommodations, texts, and course fees.
3. **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 offering the program. Additional travel for study purposes may, however, be approved where it can be demonstrated that a course/program 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 program costs.
4. **Record Keeping**
	1. Upon completion of the leadership development program, the individual’s supervisor is responsible for ensuring a copy of the certificate, and any associated transcripts are processed as follows:
		1. For All 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 filing.
		1. For All Officers:
		* Copy of certificate and transcript are forwarded to LDD secretary for filing. The LDD secretary will ensure information is recorded in the OMS database, and copies are placed in the officer’s personnel file.
5. **Repayment Requirements**
	1. It is understood that education is an investment The Salvation Army 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 Leadership Development 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/Completion Date: Jul 1, 2015

Resignation Date: Jun 31, 2017

Months Worked post Completion: 24 out of 36

Prorated Repayment to TSA Required: 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 Leadership Development Program**
	1. TSA will take all reasonable steps to support individuals who are involved in leadership development programs. However, should an individual withdraw from a leadership development program, or receive a grade of “incomplete” or “fail,” their 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 leadership development program may require the applicant to fully reimburse 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.**

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