

**TOWNSHIP OF SOUTHGATE**  
**Policy # 2**  
**Conference, Education & Training Policy**  
**Council Approval: August 18, 2022**



### **1. Purpose**

The Township of Southgate shall promote comprehensive training by providing employees and elected officials with the skills to effectively perform their jobs under a constantly changing work environment with the skills to effectively perform their jobs and fulfill their legislative duties.

The knowledge, experience and competence of Township employees are the fundamental building blocks of the Township's ability to improve the quality of life for its citizens through identifying its strengths and weaknesses. It is crucial that the Township recognize, support and encourage the development of its employees.

This policy promotes the benefits for both Employer and Employee that accrue from a collaborative, effective training and development program. Investing in improving competency and performance levels of individual employees also benefits the work area as a whole. Effective ongoing training and development plays a critical role in effective succession planning initiatives to ensure continuous improvement across the organization.

### **2. Scope**

This policy applies to all Council Members, staff and volunteer firefighters with the Township of Southgate.

### **3. Procedure**

The Township's expectation of staff that are being provided the opportunity to participate in professional development/training funded by the Township is:

- Appropriate requests for job-related professional development /training will be submitted by staff to their respective Department Head and included as part of the annual budget. Any additional requests throughout the year will require the CAO's approval;
- All costs related to succession planning initiatives will be approved by the CAO;
- An overview of the event, including current relative issues in the field will be shared with co-workers through a brief presentation at a staff meeting; and
- Following completion of all training and/or educational opportunities a "Course Report" will be completed and forwarded to the office for inclusion in the employee's personnel file. See Schedule A: Education Evaluation Report which may be shared in a Council agenda.

Members of Council will be expected to formally request attendance at training, conferences, and/or seminars through both the completion and approval of the Conference, Education and Training Request Form and the final approval supported by a resolution of Council. This resolution would allow for the Treasurer to budget and track financial costs appropriately.

For the purpose of this policy Training and Development has been grouped into the following seven categories:

- Type A – Legislated Training – training required by law
- Type B - Professional Certifications and Membership Training
- Type C – Conferences, Workshops and Seminars
- Type D– Job Specific training/development

#### **A. Legislated Training**

Legislated training is training that is required by law. Training required under the Occupational Health & Safety Act and the Ontario Clean Water Act would be examples of

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Legislated Training. Managers will include monies for Legislated Training in their budget submissions and provide a list of staff required to receive the training. A copy of this list will be forwarded for retention in each employee's personnel file along with a copy of the "certificate of training" when completed.

#### **B. Professional Certification & Membership Training**

The Township supports staff to attain professional certification in their areas of responsibility where the Township determines that professional status is a necessary qualification for the employee's current job. Training provided through these associations is specific and relevant to many municipal jobs and serves to enhance the knowledge and professionalism of our staff by providing them with the ability to work to a higher level of productivity and effectiveness.

The network of colleagues that is established by staff through membership in these Associations opens up the door to a wealth of knowledge and resources that the Township would otherwise not have access to.

Membership training (workshops, seminars or conferences) requires the completion of Schedule B: Staff Approval for Conferences & Training.

The following steps outline the process to be followed for reimbursement of professional association fees to those employees who are required to maintain a professional status as a job requirement.

1. Each manager will be responsible to submit his/her departmental requirement for professional fees to their Department Head/CAO. A summary of these memberships will be forwarded for approval in the department's annual budget. Appropriate backup to confirm the job requirement to maintain this certification/membership should be included with each submission. Membership requests outside of the budget process must be approved by the CAO.
2. Professional Association will mean an organization which is self-regulating and may accredit members to practice in the profession and to use the appropriate professional designation and/or those Associations that provide ongoing education and operational updates in a designated field.

#### **C. Conferences, Workshops & Seminars**

The Township encourages all members of Council and staff to increase their knowledge, keep current with changes in their field, and continually upgrade their skills. This improvement is often best accomplished through attendance at conferences.

##### **i. Conference, Workshop and Seminar Expenses: Council Members & Committee Member Appointments**

- All Councillors may attend 3 conferences, workshops/seminars per year (depending on budget availability and Council approval);
- Approval must be in the form of a resolution of Council prior to registration;
- All hotel and registrations must be completed by the Clerk's Office in order to properly manage records;
- A report must accompany the members expense claim for inclusion on the Open Government portal and the next available Council agenda so that other members of Council, staff and taxpayers benefit from the information obtained, sessions attended, learnings and copies of or links to the presentations.
- Registration fees, hotel expenses and parking fees will be paid by municipality when

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receipts are provided;

- Compensation rate for time away per day or for a half day will be the same reimbursement as set in the Council Compensation Policy #21 and only applies to Members of Council;
- Council members that attend the Committee of Adjustment OACA conference and/or Police Service Board conferences will count that event as one of their 3 eligible conferences each year.

#### **ii. Conference, Workshop and Seminar Expenses: Staff**

- Employees may attend 3 conferences, workshops/seminars per year based on approved Operating Budget, annual performance goals and justification with department responsibilities;
- Employees will be paid their regular working hours at their regular wage while attending conferences (not a per diem rate);
- Mileage paid on the basis of the Township of Southgate mileage policy which follows Grey County rate (carpooling where possible and encourage other modes of transportation where most cost effective); and
- Requests must be put in writing to the employee's immediate supervisor and forwarded to the CAO for review (see Schedule B: Council & Staff Approval Form for Conferences, Workshops/Seminars & Training). The request must demonstrate the following:
  - the program's ability to raise the competency and/or performance level of the individual employee,
  - a fit within the individual's Job Profile,
  - the ability of this specific training to impact the specific work area, and the performance of the employee within the work area.
- The request will then be forwarded through the budget process for approval. If the request is submitted after the budget process it must be approved by Council approval for members and by the CAO for staff.
- Township staff who attend a conference approved by the Township are responsible for completing and submitting a Summary Report of the training in a timely manner upon their return (see Schedule A: Education Evaluation Report). A copy is to be provided to the appropriate Department Head with an additional copy being placed in the employee's personnel file in Human Resources. Staff members are also encouraged to share what they have learned with co-workers through a presentation at a staff meeting, including copies of any relevant handouts and may be included in a Council agenda.

#### **iii. Volunteer Firefighter Staff**

- Volunteer firefighters will be paid for a full day or a half day rate determined by the Firefighter Pay Grid while attending workshops, seminars, local training upgrades, or Ontario Fire College training sessions;

It is recommended that conference, workshop/seminar expenses and training expenses be treated as two separate budget items.

#### **D. Job-Specific training/development**

The Township of Southgate encourages professional development opportunities through education programs, courses, training and certifications. Based on the annual Operating Budget,

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staff, upon approval from their supervisor, may submit a request for an education program, course or certificate.

1. Subject to recommendation by the employee's Department Head/CAO, available funding, and supported by employee's job description, employees may enroll in work related correspondence, in-class or night school courses;
2. Online learning opportunities are encouraged and preferred. In-class options will be approved based on annual Operating Budgets and departmental needs during extended periods or in class requirements. Opportunities that are available both online and in class, will be based on the preference of the individual, with approval by their supervisor.
3. Department Heads should ensure that appropriate funds are set aside for their staff in each year's budget for Council's consideration and approval;
4. All requests not included in the budget process must have the recommendation of the CAO and be approved by Council;
5. Employee must submit a course outline, registration application and completed Schedule C document tilted, Request to Enroll in Education Courses;
6. The Municipality will cover the costs of the program, course or certification whether the in-class or online option is preferred and provide the individual taking the in-class options the additional time off required. The employee may need to make up some of the time off depending on operational needs of the department.
7. For education programs, training, courses and certificates that directly relates to an individual's role or is mentioned as a preference in the job description, when an in class option is the only opportunity, mileage will be paid at the Township rate, with any additional expenses such as parking, be covered, with receipts. Overnight and meal expenses will be considered, depending on the location and budget availability.
8. Up to three (3) hours for exam time will be provided, whether in class, online or open book.
9. For University/College courses the employee may have the tuition fee reimbursed upon receipt of final grade transcript or completion certificate; and
10. The required course materials of study may also be eligible for reimbursement upon successful completion of the course, provided the textbook becomes the property of the Township. The Township will not provide reimbursement for "suggested or recommended" reading material.

#### 4. Reimbursements and Allowances

Staff and Council members shall be reimbursed the in accordance with the following:

- Meal allowance compensation per day will be reimbursed at rate of \$75 per day and receipts must be submitted with expense report forms;
- Alcohol will not be reimbursed.
- Tips and Taxes are reimbursed and are included in the maximum of \$75 per day allowance.
- Mileage will be reimbursed at the rate as set out in Policy #22: Vehicle Safety and Use Policy.

#### Attachments:

Schedule A - Education Evaluation Report;

Schedule B - Staff Approval Form for Conferences, Workshops/Seminars & Training; and

Schedule C - Request to Enroll in Educational Courses.



**Schedule A**

**Conference, Workshop/Seminar & Training Policy #2**

**Council and Staff Education Evaluation Report Conference, Training, Seminars & Professional Development/Self-Study**

Participant's Name: \_\_\_\_\_

Course/Workshop/Conference:	Overall Evaluation: Excellent Good Average Poor
Association /Institution Provider:	Name of Instructor:
Dates of Attended: (if online, indicate online)	
Purpose of Attending:	
Please summarize the contents and the main points of the course: (Attach additional pages if necessary)	
Will you use this information in your role? If yes, explain how:	
Do you recommend that other Council Members/Staff attend this course? If so, who and why:	
Should similar course material be presented in house? If yes, by whom?	
Signature:	Date:



**Schedule B**

**Conference, Workshop/Seminar & Training Policy #2 Approval for Conferences**

**Training Request Form for Staff, Council and Committee Members**

Please Circle one:            Staff            Member of Council            Member of Committee

Participants Name: \_\_\_\_\_ Department: \_\_\_\_\_

	<b>Date(s):</b>	<b>Location:</b>	<b>Registration Cost:</b>
<b>Conference</b>	<input type="checkbox"/>		
<b>Seminar</b>			
<b>Workshop</b>	<input type="checkbox"/>		

**Description:** \_\_\_\_\_

**Hotel costs:** \_\_\_\_\_ **Travel costs:** \_\_\_\_\_

**Note:** *Council and Committee Members that cancel without sufficient notice and/or a justified reason will be required to pay personally all unrecoverable event registration and hotel costs.*

Justification & Reasons for Attending:	
Additional Details or Information:	
Will this Qualify as a Job Training related to Job Description or Ministry Requirements:	
Yes or No	Training Hours: _____ (if applicable)
<b>Attach agenda, registration details or outline of the events or course description</b>	
Participant's Signature:	Date:
Department Head Approval:	Date:
Mayor or CAO Approval:	Date:
<b>Council Resolution# _____ (for Council &amp; Committees)</b>	
<b>Included in Budget Approval</b>	<b>Requires Additional Budget/Council Approval</b>



**Schedule C**

**Conference, Workshop/Seminar & Training Policy #2**

**Staff Request to Enroll in Educational Courses**

- 1. Job Related
- 2. Non Job Related

Name of Employee: \_\_\_\_\_

Name of Course of Study and Name of Provider (school):  
\_\_\_\_\_  
\_\_\_\_\_

Date Course Begins: \_\_\_\_\_

Date Course Ends: \_\_\_\_\_

Location: \_\_\_\_\_

Total Cost (provide details i.e. tuition, text):  
\_\_\_\_\_  
\_\_\_\_\_

Are those funds within approved budget? \_\_\_\_\_

Briefly explain why you consider this course to be related to your work with the Township:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature of Employee: \_\_\_\_\_

Authorization of Department Head: \_\_\_\_\_

Authorization of CAO: \_\_\_\_\_

Council Approved (please check):  Yes  No  Not Required