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POLICY

The Brenda Strafford Foundation (the Foundation) will provide education reimbursement funds to employee applicants who meet the criteria established by the terms of Employee Educational Reimbursement Funds program.

All employees across all sites of The Brenda Strafford Foundation (Bow View Manor, Cambridge Manor, Clifton Manor, Tudor Manor and Wentworth Manor) are eligible to apply. Staff of Institut Brenda Strafford (Haiti) and Village of Hope (Jamaica) are eligible to apply for the education reimbursement funds.

PURPOSE

To encourage and support professional and personal development of our employees; and to enhance employee recruitment, retention and career development within the Foundation and for the benefit of the Foundation. The Foundation supports the concept of career development and wishes to support all staff with requisite knowledge and skill.

TERMS

1. Educational reimbursements will be awarded twice a year in May and November at the discretion of the Foundation President & CEO, except when this changes due to unforeseen circumstances.
2. The Educational Reimbursement Fund Committee (the Committee) will call for applications for reimbursement 4-6 weeks in advance of the May /November dates.
3. Applications for reimbursement funds will be considered when the course of study broadens knowledge, upgrades the credentials in a current position or allows for career advancement or a change of career to a position required within the Foundation.
4. The amount of reimbursement funds for disbursement in any given year will vary; dependent upon number of applicants and other financial considerations; the Committee has the ability to limit the amount of reimbursement funds requested. Disbursement Criteria are outlined in this policy.
5. The Foundation will accept applications for reimbursement base on a year by year basis or a course by course basis; applications for the full amount of a 4-5 year course of study will not be considered for a lump sum reimbursement.
6. The Foundation expects that most applicants will assume a portion of the cost of their education; applicant's cost sharing demonstrates the applicant's commitment to the educational process.



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7. Applicants are invited to apply for reimbursement funds for as many courses/years as necessary to complete their course of study; provided that, the Committee is in receipt of a copy of an official transcript of grades which demonstrates successful completion of the course of study to date; a maximum reimbursement amount of \$20,000 per person within a 5 year period may be considered.
8. The reimbursement fund is intended to supplement the cost for tuition and books for a course of learning at a recognized /accredited university or learning institution.
9. All employees (full-time, part-time, casual) of the Foundation who have worked at least two thousand (2000) hours in the prior two (2) year period are eligible to apply for reimbursement funds. Only courses commencing after the completion of the required two thousand (2000) hours of service will be considered.
10. Courses that meet at least one of the following conditions will be considered:
 - Courses taken within 12 months prior to the application date; or
 - Courses currently enrolled in, and paid for by the employee; or
 - Courses registered for and paid for by the employee.
 - If courses have not yet been registered for the employee must provide the name of the course, the institution where the course will be taken and the date which the course will be taken.
11. Applicants are expected to remain in the employ of the Foundation during the course of study; if flexibility in work hours is required, the request will be in writing and the Foundation will do their best to accommodate the request.
12. Reimbursement recipients are expected to commit to a service agreement with the Foundation for a minimum of two thousand (2000) hours upon completion of the course of study. This commitment can be completed in a full-time, part-time, or casual capacity.
13. The Foundation does not guarantee a position of employment in the new position after completion of the course of study; the Foundation will work with the recipient to accommodate a position within the Foundation; this may necessitate moving employment to any one of the Foundation sites.
14. Failure of the employee to complete the course of study or to remain in the employ of the Foundation for at least one year post course completion may be considered a default under the terms of the receipt of the reimbursement agreement and will result in the repayment of the reimbursement funds to the Foundation. Further terms are outlined in the Reimbursement Fund Agreement.
15. The reimbursement recipient must provide a copy of an official transcript of grades for every semester completed and a copy of certificate or degree upon completion of the course of study to the Committee. The official transcript must



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be provided prior to applying for additional reimbursement funds.

APPLICATION PROCESS

1. The applicant will complete the Education Reimbursement Application Form, including the Employee Educational Reimbursement Fund Cover Letter, included with this policy; include a course description and outline from the intended university or learning institution.
2. The applicant will write a letter of consideration to the Committee detailing their history with the Foundation, career goals and objectives and the plan to achieve them; reasons the applicant feels deserving of the award and their career plans for the future.
3. The applicant will provide the Committee with the names of two references (one of which is the Administrator/Executive) who supports the employee in their educational goals. The application form must also be endorsed by the Administrator/Executive; the references will provide a letter recommending the employee for reimbursement.
4. The applicant must submit documents to the Chair of the Committee including the Application Form, the letter of consideration, information on course of study, name of college or university, letters from the references/ and all other documentation indicated on the cover letter, by no later than the specified close date, such date to be provided upon call for applications in May and November.
5. Applicants must provide in writing to their site/work location Administrator/Executive any request for flexibility of their employment schedule with the Foundation while attending study/course.
6. Proof of admission and receipt of payment to a recognized educational institution must be provided along with the signed Receipt of Reimbursement Agreement before any reimbursement funds are disbursed.
7. In the event that a reimbursement is recommended to an applicant where the applicant cannot provide evidence in writing of acceptance to the recognized educational institution, the reimbursement funds will be held by the Foundation until such time as the applicant can provide evidence in writing of acceptance into the course of study. In the event this information has not been received by the Committee within 6 months of the date of the award the reimbursement will be rescinded by the Foundation and the applicant must reapply at a later date.
8. Incomplete applications will be returned to the applicant without consideration by the Committee.



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SELECTION PROCESS

1. Educational Reimbursements will be considered by the Committee based on the merit of the application, the needs of the Foundation, employee in good standing, and assessment of the applicant's ability to meet the terms of reimbursement.
2. The Reimbursement Committee will meet twice a year in May and November.
3. The Reimbursement Committee will ask for applicants to submit requests for reimbursements at least one month in advance of the semi-annual meeting.
4. Applications will be reviewed and reimbursement candidates will be identified and recommended for reimbursement to the President, CEO.
5. The application review process will be an open, fair and equitable process for selecting recipients according to the terms of reimbursement; the integrity of the process will be maintained to ensure it meets the intention of the terms of reimbursement and to avoid any potential conflict of interest.
6. The Committee in conjunction with the President, CEO will notify the successful applicants of their Reimbursement Award.
7. The names of all successful applicants will be published on the Foundation website /careers section together with a photograph of the recipient receiving the award.

ACKNOWLEDGEMENT OF REIMBURSEMENT FUNDS

1. Upon acceptance and receipt of the Foundation Educational Reimbursement Award, the recipient will enter into a Receipt of Education Reimbursement Agreement (the agreement) in writing with the Foundation which will outline the terms of the agreement including: the amount of the reimbursement funds, the estimated time of completion of study, the special working arrangements during the course of study, and the terms of repayment of funds in the event the recipient does not complete the course of study , or is unable or unwilling to remain in the employ of the Foundation for at least one year from the date of completion of the course of study, or for any other reason the recipient defaults on the terms of the agreement.
2. The agreement between the Foundation and the reimbursement recipient will be a legally binding contract and will afford the Foundation all remedies under the law to collect the outstanding reimbursement funds in the event of default by the recipient, for any reason, on the terms of the agreement.



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3. An agreement will be provided to each recipient upon acceptance of the terms of the reimbursement fund award and will be signed by the parties upon receipt of the reimbursement funds; with a copy provided to each party.

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4. In the event of the need for repayment of the reimbursement fund award, the employee will reimburse the Foundation in the full amount of the reimbursement award together with interest at Bank of Canada prime rate from the date of default until all funds are paid in full.
5. In the event of default under the terms of the reimbursement fund agreement, the enforcement of the repayment provision will always be at the discretion of the Foundation President & CEO.

REIMBURSEMENT FUND: DISBURSEMENT CRITERIA

In order to ensure fair and equitable disbursement of the Education Reimbursement funds, the following criteria will be applied:

- Education that directly relates to current position or next level: payment of 80% of requested funding up to a cap of \$7,000.00 per fiscal year cycle;
- Education that indirectly relates to current position: payment of 60% of requested funding up to a cap of \$3,500.00 per fiscal year cycle.

Direct: To obtain knowledge and/or learn new skills for a current or a future position that aligns to the next progression. i.e.: HCA training for LPN, LPN to RN, and any position directly in continuing care.

- HCA certification
- LPN certification
- RN certification
- Health Care professional role (OT/PT, SW)
- Health Care administration
- Leadership

Indirect: To obtain knowledge and/or learn new skills that are outside of current scope. Areas that do not directly relate to HealthCare:

- Engineering
- Law
- Human Resources (where not current primary role)
- Personal interest courses
- Accounting and Finance (where not current primary role)
- Administration roles (where not current primary role)
- Support Services to Nursing
- Support positions applicants- discussion with the direct leader related to the application in determining criteria for direct, indirect disbursement options.



EMPLOYEE EDUCATIONAL REIMBURSEMENT FUND - COVER LETTER

To the Educational Reimbursement Fund Committee of The Brenda Strafford Foundation.

Attached is the Employee Educational Reimbursement Application Form.

I acknowledge that included with this application are the following documents:

Name of Applicant: _____

- Application form completed in full
- Applicant's letter to Reimbursement Committee requesting consideration for funds
- Letters of support from two (2) reference (one of which is from the Administrator or Executive)
- Approval of Application by Administrator or Executive
- Proof of acceptance and payment to College/University/or Accredited Institution
- I have read and understand the terms and conditions of the Employee Educational Reimbursement Fund Program

Signature

Date

All documents must be completed and submitted by the specified close date. Late or incomplete applications will not be accepted.

Please send to: Employee.Reimbursement@theBSF.ca



EMPLOYEE EDUCATIONAL REIMBURSEMENT APPLICATION FORM

Employee Name:		Employee #:		Date of Application:	
Street Address:				Date of Hire:	
Email Address:				Position:	
Facility Name:					
Department:					
Name of 2 References (one (1) of which must be Administrator/Executive):					
Plan of Study:					
Program:					
Flexible Work/Study Plan required: Yes or No: where yes, please speak to Administrator/Executive to review requirements. Assessment of current business needs may factor in the ability to accommodate, or accommodate fully.					
Course Name	Program	Institution	Start Date	End Date	Tuition
Keynotes:					
<ul style="list-style-type: none"> ➤ A copy of an official transcript of grades is required by the Committee upon completion of courses, prior to applying for additional reimbursement funds, and on completion of the program. ➤ There is a minimum one year service commitment to the Foundation, which time will 					
Enclose the following to complete the application:					
<ul style="list-style-type: none"> ➤ Applicant's Letter to Reimbursement Committee requesting consideration for funds ➤ Letters of support from two references ➤ Application signed off by Site Administrator ➤ Proof of admission to a recognized educational institution must be provided along with the signed receipt ➤ Any additional attachments such as course specific information that will support the request 					
Administrator/Executive Signature:				Date:	
I validate and acknowledge support for this application, and confirm that the applicant is in good standing					



PURPOSE OF COLLECTION, USE, DISCLOSURE AND RETENTION OF PERSONAL INFORMATION

Your personal information is being collected on behalf of **The Brenda Stafford Foundation** for the purposes of processing and evaluating reimbursement applications, selecting and processing reimbursement recipients and administering reimbursement payments once awarded. Your personal information will be collected from you and may also be collected from references, secondary and postsecondary educational institutions, government, community or other sources based on the information provided by you in this application. This process will include the release of any or all of your personal information to **The Brenda Stafford Foundation** and Reimbursement Committee members as well as any other third parties where such release is necessary for verification, reimbursement Evaluation, selection, and administration purposes. Your personal information may be used in the future for the purposes of contacting you in evaluating outcomes associated with the Reimbursement program. There will be no other uses or disclosures of your personal information unless required or authorized by law or unless you are contacted, and your permission is requested. The personal information being collected in the application is limited to only that information which is necessary for the full consideration of your reimbursement application and the purposes noted herein.

PROMOTION PURPOSES FOR RECIPIENTS

The Brenda Stafford Foundation may wish to announce reimbursement winners, their current educational institution, the university or college where they intend to study, and the course of study funded by the reimbursement, as well as the amount of the reimbursement, or to use or disclose recipient information for promotional purposes. **The Brenda Stafford Foundation** shall be responsible for obtaining the consent of recipients for such purposes.

RETENTION OF PERSONAL INFORMATION

The Brenda Stafford Foundation will securely retain personal information about applicants for the purposes of verifying applications, completing the assessment and evaluation, selecting a recipient, administering reimbursement payments, and addressing any concerns regarding reimbursement awards. Furthermore, **The Brenda Stafford Foundation** will retain certain personal information collected throughout the application process for the purposes of contacting you in the future, for assessing the efficacy of the reimbursement program.

CONSENT

You may refuse to provide personal information to us. You may also withdraw your consent at any time, subject to legal or contractual restrictions and reasonable notice. However, in either case, this may limit your reimbursement eligibility and our ability to administer the reimbursement payments. **By completing and signing [submitting] this application you are consenting to the collection, use, disclosure and retention of your personal information for the above stated purposes.**

Name Printed: _____ **Date:** _____

Signature of Applicant: _____



The Brenda Strafford Foundation - Employee Educational Reimbursement Fund

In compliance with Privacy Law, personal information about your application will not be released except where such release has been specifically authorized by you herein.

I certify that all information provided in this application form and attached documents are true and accurate to the best of my knowledge. I understand that acceptance of this application or receipt of any reimbursement/award issued to me may be revoked without notice if any information in this application is subsequently found to be false.

Name Printed: _____ **Date:** _____

Signature of Applicant: _____