



Professional Development Training, Webinars, and Conferences Expense Reimbursement and Approval Policy

Scope:

This policy provides guidance related to:

- The approval process for professional development activities
- Employee eligibility
- Expense coverage

Purpose:

The purpose of this policy is to provide consistent guidance for professional development approval.

The philanthropic collaborative encourages employees to enhance their knowledge and skills as well as network with other professionals. Our employees are our greatest asset, and the success of our business directly reflects the quality of our workforce. We recognize that for development purposes, employees may need to attend training seminars or workshops conducted off-site or join professional associations that will enable them to remain up to date on best practices. Please note that this policy is subject to annual company budgets. Budgets are discussed in August and finalized in December.

Employee Eligibility Criteria:

This policy applies to active, full-time, non-exempt and exempt CICF employees. Excluded from eligibility are temporary employees, contingent/contract workers, and those on educational or other personal leaves of absence. Employee eligibility is not contingent on the length of service.

The eligible employee must **not**:

- Have an active corrective action plan.
- Currently be on a Performance Improvement Plan (PIP) unless the development activity is required as a necessary action for the PIP.
- Have utilized funds more than once in the calendar year.

Expenses not covered:

- Registration and membership fees paid without first obtaining approval.
- Any other professional development-related expenses accrued without first obtaining approval.
- Expenses that fail to meet the standards and/or guidelines defined in this policy.
- Expenses for personal entertainment or activities unrelated to the approved training.
- Costs associated with unapproved extensions of travel.

Expenses Covered:

- **Registration Fees:** The company will reimburse the full cost of approved registration fees for the training, webinar, or conference.
- **Travel Expenses:** Reimbursement will be provided for reasonable and necessary travel expenses, including airfare, mileage, and ground transportation.
- **Lodging:** Reasonable lodging expenses will be reimbursed for the duration of the approved event.
- **Meals:** Employees may be reimbursed for reasonable meal expenses during the training, webinar, or conference.

Note: Employees are required to retain all receipts obtained during the development activity. Failing to provide support for expenses would result in having to cover them personally.

Request and Approval process:

- The employee expresses interest in a development activity with their manager. This discussion should focus on how the development activity aligns with the needs of the employee's role and how they plan to apply the skills acquired through this professional development opportunity. If the manager approves enrollment, the employee will proceed with the enrollment process.
- The employee must complete the [Professional Development Application](#). (located in SharePoint under Quick Links). Once the application is submitted, it will go directly to your supervisor. Once the supervisor has approved or denied the application, it will be delivered to the Vice President of People and Culture.

Managers should consider the following when discussing and approving.

- Relevance to the employee's current role, development needs, career aspirations, and the needs of the entity overall.
- Ensure the professional development activity is a beneficial investment of the employee's time and resources.
- Ensure the cost of the development activity has been appropriately planned for and is available in the department's budget.
- Managers should provide a written response either approving or denying the application request. If the request is approved outside the policy guidelines, the percentage paid is at the manager's discretion. The agreed-upon percentage should be listed in the application, along with the manager's documented approval.
- If the manager denies the request, the manager must provide details explaining the reason for the denial as well as any potential options for more appropriate development activities.

Once the manager receives, approves, and signs the application, People and Culture will be notified through an email notification.

All requests must adhere to expensing guidelines set forth by Operations to ensure funds are dispersed and or reimbursed in a timely manner. If an employee does not have access to a Corporate Card, they can either pay personally for the expenses and request reimbursement via an expense report in Paylocity, or have the manager expense it with a Corporate Card deducted from the departmental budget.

- Receipts/invoices are required to validate expense amounts for reimbursement.
- Employees must adhere to expense guidelines determined by Operations.
- Employees must file an expense report through Paylocity no later than 30 days after incurring the expense and should provide detailed receipts/invoices for all expenses, including a detailed breakdown of fees.

For some development activities, supplemental financial support may be available to offset a portion of the costs. If the employee receives assistance from other sources such as sponsorships, fellowships, scholarships, private foundation grants, and government assistance, the company assistance will apply only to that portion of costs not otherwise covered. The participant must notify the approving manager of the amount, type, and timing of the additional aid.

Clause: Training necessary for licenses and certifications for specialized roles, such as CPA and SHRM, is exempt from the once-a-year requirement.

Policy Review: This policy will be reviewed annually to ensure relevance and effectiveness. Any updates or revisions will be communicated to all employees.

Date of Implementation: Effective Immediately