

Directive – Learning and Development

This directive supports the Core Policy of “developing and maintaining a versatile workforce that can adapt to meet changing needs”. It covers funding for learning and development activities for all regular employees, including both bargaining unit and excluded employees.

The B.C. Public Service Agency is responsible for developing and maintaining a government-wide strategy for learning and development that ensures that available funding is strategically invested in the areas of greatest need.

Organizations within the B.C. Public Service are responsible for:

- Developing organization-specific training programs
- Ensuring that organization-specific training programs do not duplicate training programs available through the Agency
- Ensuring that workforce plans identify key training needs

Job-related Training

All training that is required for employees to be able to undertake their current job assignments or to enhance their job performance is considered to be *job-related* training. Auxiliary employees, co-op students, and other employees who do not have regular status are eligible for job – related training. Job-related training is provided by the organization at no cost to employees and at the request of the employer.

Job-related training is normally conducted during regular working hours and is treated as regular worked hours. If training needs to take place outside of normal working hours or overtime is required, employees are compensated based on the terms and conditions of their contract of employment. All training costs and expenses are either paid by the organization or reimbursed to employees.

Employees need to be given time off to attend job-related training; however, organizations may delay the training for a reasonable period of time to meet operational requirements.

Mandatory Training

All training that is required by legislation, policy, or collective agreements is considered to be *mandatory* training. An example of mandatory training is Joint Occupational Health and Safety Committee training. The same provisions for compensating employees for job-related training are applied to mandatory training.

Developmental Training

Supervisors will ensure that employees are provided with learning and development opportunities based on an assessment of their performance, potential, and role in the B.C. Public Service. This assessment is undertaken as part of the performance management process (see *Directive – Employee Performance Management*). Learning and development assessments are conducted with the active participation of the employee.

If an employee's job performance is not satisfactory, the supervisor and employee will determine the best way for the employee to gain the required competencies, knowledge, skills, or abilities.

If an employee's performance in the current job is satisfactory or better, the supervisor needs to assess the employee's potential for both career growth within the BC Public Service and related training needs. This training is voluntary and is intended to prepare the employee for more highly skilled positions, promotion opportunities, lateral positions, or staying in their current role. This training must be aligned with the program objectives of the organization or government of B.C.

For learning or development opportunities leading to a certificate, diploma, or degree, employees apply to the Pacific Leaders Scholarship for Public Services Program for funding assistance (see below).

Probationary and auxiliary employees, co-op students, and other employees who do not have regular status are not eligible for developmental training funds.

Employee/Supervisor Obligations

When learning and development activities have been identified as part of the performance management process to enhance employees' skills and abilities in their current job or to prepare them for future career opportunities, employees are required to participate in the learning activity.

When employees register for courses or workshops, they must:

- Attend the course/workshop, or if unable to attend, they must inform their supervisor to make alternate arrangements, such as cancel the registration within the cancellation period or find a substitute to attend.
- Participate actively to maximize the benefits of learning opportunity.
- Satisfactorily complete all requirements to successfully complete the learning event.
- Apply the new skills and abilities to improve performance on the job.

- Share the skills and abilities with others within the organization to enhance the performance of the organization as a whole.

Supervisors will ensure that employees who have successfully completed training or development activities will have an opportunity to use those skills and abilities in their current job by assigning relevant opportunities so they can practise what they have learned.

Pacific Leaders Scholarship for Public Servants Program

The Pacific Leaders Scholarship for Public Servants Program provides funding for learning or development opportunities offered by a post-secondary educational institution that lead to a certificate, diploma, or degree. The program is designed to ensure that all regular employees have equal access to funding for post-secondary training and education. Auxiliaries, co-op students and employees who are new to the Public Service and have not completed their probationary period are not eligible.

Pacific Leaders Adjudication Panel Role

On the advice of the Pacific Leaders Adjudication Panel the Deputy Ministers' Council on the Public Service decides:

- which applications will be approved
- level of funding
- criteria for any exemptions

Eligibility and Funding

The Adjudication Panel provides a scholarship of 75% of tuition and books to regular full-time or part-time employees who:

- Have a clearly defined career path established in their Employee Performance and Development Plan (see *Directive – Employee Performance Management*) that is aligned with the direction of the BC Public Service
- Have been accepted into an academic program that is consistent with their career path
- Have a satisfactory performance review from a supervisor
- Provide one or more letters of support, including one from a current supervisor
- Provide a maximum 500 word letter indicating how the program will support their career in the Public Service

For each 12-month period in which the scholarship is provided, one year return-of-service is expected from the recipient beginning on the course end date.

Requirements of Applicants

Employees submit their application to a supervisor for approval.

If the application requirements are met, the supervisor forwards the application package to their ministry contact, who will in turn forward the completed application to the Agency.

Employees must keep their supervisor updated on their educational progress during their mid-year and end-of-year performance reviews.

At the completion of the educational program, employees must provide proof to their ministry that they have completed or passed the course(s). If employees are unable, without good reason, to complete or pass an educational program funded through a Pacific Leaders Scholarship, they are expected to return the scholarship to the government of B.C.

Agency Role

The Agency receives applications at regular intake periods, liaises between the adjudication panel and the ministries, issues policy directives and provides general information on the program.

Ministry Role

The Ministries are required to:

- send a follow-up letter to approved recipients with information about the level of approved funding and instructions on how to receive their reimbursement
- ministries will process payment based on the approved funding level provided by the BC Public Service Agency and according to government financial policy and procedures, preferably prior to the beginning of the study period.
- ensure the recipients submit copies of completion and / or pass marks to the ministry contact person.
- report on recipient disbursements by October 31, January 31 and April 30 annually.

The Ministries may:

- request the repayment of the full amount of all scholarship amounts, pay, benefits and other expenses, or part thereof in the following instances:
 - a. failure to maintain a satisfactory standing in their course of studies;



- b. failure to resume employment with the public service on completion of the course of study; or
 - c. termination of employment with the public service before completing the return of employment agreement.
- provide recipients with an accountable advance, based on hardship. Where this is the case, please consult *Core Policy 4.3.9 Advances – Other Accountable Advances* for accountable advance procedures.

Ministries will not be permitted to top up applications beyond the approved level of funding. This decision is based on the principles that more people should benefit from this program and that there should be consistency across the B.C. Public Service.

Steps for Processing Applications

1) Verify Employee Via CHIPS:

- Go to: <http://www.bcpublicservice.ca/>
- Link to: CHIPS then CHIPSBC then Workforce Administration then Job Date.
- Enter an employee's IDIR then verify that they are a regular employee and have passed their six month probation period by viewing dates of employment; including auxiliary time worked.
- For a list of ministries/organizations that are both eligible and ineligible under the Public Service Act, see "Eligible Ministries, etc. Under PSA" file. If unsure if an applicant is part of the Public Service Act, contact Allan O'Neill in Performance Measurement & Corporate Recruiting at 356-2161.

2) Verify that School is Designated:

- Go to: https://www.aved.gov.bc.ca/sfas-bin/phcgi?PH_APP=SFASAPP&PH_QKC=phw_des_schl01.QKC&PH_HTML=%20phw_des_schl01.HTM to enter the school name under "School Name". Verify that the school is a designated institution.

3) Review Documentation:

- All documentation must be included and up-to-date. If any documents are missing, email the applicant requesting the missing piece to demonstrate trail of correspondence. Inform the applicant that the application is not considered complete and will not be included in the intake until all documents are received. Provide applicant with timeline of when missing documentation is expected to be received.
- Personal letter
- Letter of support
- Return of service - must be signed with accurate dates
- Current EPDP – must be signed and dated by applicant and supervisor
- Transcript of grades, if renewal application – may be a unofficial web version

It is recommended that you review a previous intake's spreadsheet and replicate its format.

The following is a guide to entering data in the various columns:

Renewal: Is it a renewal? (Yes/No)

Group: Approved/Denied, to be filled in after the results of the adjudication

First Name/Last Name: Self-explanatory

Address: Take great care to use a consistent format when entering addresses due to the sensitivity of the mailout of the congratulatory letters from the Premier's Office. If provided with both a street address and PO Box information, always use the PO Box

City/Province/Postal Code: Self-explanatory

Corporation: The name of the applicant's ministry or organization

Branch/Supervisor: Self-explanatory

Course: The applicant's program. Take care to be consistent with program names

Institution: The applicant's institution, to be checked at a later step

Backdated Request: Has the applicant requested a backdate?

Regular Employee: Does the applicant have regular status? To be checked at a later step in the process

Designated University: Is it a designated educational institution? To be checked at a later step in the process

Estimated Tuition 100%/Estimated Books 100%: The amounts that the applicant has entered for tuition and books

Estimated Total 100%: The sum of tuition and books. If the estimated total exceeds the funding maximum for the applicant's specific educational program, the funding maximum is entered instead

Funding Maximum: Based on the applicant's educational program. It is \$5000 for diplomas, bachelor degrees, and certificates (including Masters Certificates) and \$7500 for Masters and Doctoral degrees (including CMA)

Notes: If there is anything unusual about the application, this gets noted here. This includes if there is anything missing, any data that needs to be clarified, or anything in need of resolution

Employee number/Email Address: Self-explanatory

Requested Missing Info: This is the date upon which the PLS Administrator requests any missing information or documentation from an applicant

Received Missing Info: The date upon which any missing information or documentation was received/resolved

3) Check Applications for Completion and Data Integrity

1. Check the application for completion during data entry.
2. Every application must include:
 - a. Both pages of the application itself
 - b. A short letter from the applicant
 - c. A letter of support from their supervisor
 - d. Their most recent EPDP or equivalent performance evaluation documentation

If the application is a renewal:

1. The applicant must also submit a record of their grades.

This may come in the form of transcripts, though screenshots of an online record are also acceptable.

If anything is missing:

2. Record it in the **Notes** column.

3. Check the application for data integrity

*Applicants often make simple mistakes while filling out the application form. If anything is in need of clarification, record it in the **Notes** column.*

4. Ensure that both pages of the application are signed by both the applicant and their supervisor.

*If the application is missing a signature, record it in the **Notes** column.*

5. If any of the above are in need of resolution, contact the applicant by email and request the missing documentation/information.

*Record the date of the request in the **Requested Missing Info** column.*

6. When all of the problems with the application are resolved, reflect it in the **Notes** column.

*Put the date of resolution in the **Received Missing Info** column.*

3. If the applicant is not able to produce the required information or documentation by the absolute cut-off date, the administrator will:
 - a. mark them in the **Group** column as Denied
 - b. change the text color in the row to red
 - c. move the row to the "Not Approved" worksheet

4. Once all of the applications have been resolved, continue on to the next step.

4) Verify Applicants are still with Government

1. Check to make sure that all of the applicants are still with government.

Contact the BCPSA Executive Office (currently Yvonne Slater) to see who can do the check. Once the person is identified, forward to them the list of applicant names including organization and employee number information, and they will run the check.

5) Verify Regular Employee Status

1. Check to make sure that all of the applicants are regular employees.

Submit a request to Corporate Reporting, part of the Business Performance division, (currently Allan O'Neil) and send them the list of applicant names including organization and employee number information, and they will run the check.

6) Verify that Applicants do not already have an active Pacific Leaders Scholarship

1. To make this check, you must:
 - a. Compare the current intake's applicant list to the previous two to see if there are any instances of overlap.
 - b. If any are located, check the specific intake's spreadsheets to see if the applicant(s) in question had been backdated.

If any overlapping scholarships are found, then the applicant is considered ineligible.

7) Confirm that all Institutions are Designated Educational Providers

1. Confirm that all applicants have chosen a designated educational institution by:
 - a. Identify questionable institutions
 - b. Use Student AID BC's designated schools search tool, found here: [StudentAidBC website.](#)

Please note that there are a few providers that are acceptable but don't appear via the tool, including Certified General Accountants Association of BC, Certified Management Accountants Association of BC, the Certified Financial Analyst Institute, and the Canadian Institute of Chartered Accountants.

- c. If an applicant's institution is identified as ineligible then:
 - a. Inform the applicant that their application has been denied
 - b. Inform them that they can apply to have their institution designated via these [forms](#)

8) Confirm that the Applicant's Certification is Aligned with Government's Needs

1. For any unusual certifications/designations, the program administrator must determine whether or not it is considered to be useful for the needs of government.

In some cases, it will be obvious that the designation is ineligible but sometimes an employee pursuing an unusual designation will be part of an organization's plan. If this is suspected, move on to the next step.

2. Contact the applicant's ministry/organizational scholarship program representative to either confirm or disconfirm the suitability of the employee's chosen designation.

9) Confirm Applicant's GPA for all Renewals

1. For all renewal applications it must confirmed that the applicant is meeting the minimum grade point average or above, to do this the administrator must:

- a. Check the transcripts/record of grades for all renewing applicants to see if they meet the standard minimum GPA of 60%.
- b. If an applicant's grades fall below the minimum, you must consult with their ministry/organizational scholarship program representative to confirm whether the organization will continue to support their employee or not, despite their grades.
- c. If they agree to support the applicant, then processing continues.

10) Inform All Ineligible Applicants of their Disqualification

1. Inform all applicants who were rendered ineligible that their application for a scholarship has been denied.

Always make sure that this is reflected on the spreadsheet.

11) Process the Backdating Requests

1. For all instances where an applicant has requested to have their application backdated, contact their ministry/organizational scholarship program representative to confirm whether or not the backdating of their application is supported.

If support is not granted for the backdate, inform the applicant of the decision, and verify whether they want to go forward with the application with the standard scholarship year. If not, withdraw them from the program and update the spreadsheet to reflect this.

12) Create a Briefing Note for the Approval of Scholarship Applicants

1. The most efficient way to start the Pacific Leaders briefing note is to use a previous version (found within the briefing note subfolder within the most recent intake folder in the M:\Human Resources\Scholarships location) as a template and then:
 - a. Clear out all of the numbers, totals, dates and dollar values but leaving intact the individual intake summaries of previous intakes in the **Background** section as they will not have changed.
 - b. Add a summary of the current intake to the **Background** section, displaying the date of the intake and the amount of suggested approvals and denials.

There are four categories that the designations must be divided into:

- *Certificate/Diplomas*
 - *Bachelors*
 - *Masters*
 - *PhDs*
- c. Calculate and summarize all of the required business intelligence, including:
 - The total number of each degree.
 - The number of new vs. renewal applications for each degree.
 - The total number of applications falling into each category, and the amount of new vs. renewals that make up each total.
 - The total dollar value for each of the four categories. The following funding maximums are always used: \$5,000 for Certificates/Diplomas and Bachelors, and \$7500 for Masters, PhDs and CMAs.

The most efficient way to do this while retaining the required fields is to take a previous spreadsheet, clear out all of the data except the headings, and save it with the filename "[Month][Year]Intake" in the folder that you've created. You can find previous spreadsheets within their specific intake folders found in the folder M:\Human Resources\Scholarships.

- b. Create a second tab in the spreadsheet with the same column headings to display the application data of applicants who are not approved.
- c. Enter the data into the spreadsheet, one row per application.

It is recommended that you review a previous intake's spreadsheet and replicate its format.

The following is a guide to entering data in the various columns:

Renewal: Is it a renewal? (Yes/No)

Group: Approved/Denied, to be filled in after the results of the adjudication

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Corporation: The name of the applicant's ministry or organization

Branch/Supervisor: Self-explanatory

Course: The applicant's program. Take care to be consistent with program names

Institution: The applicant's institution, to be checked at a later step

Backdated Request: Has the applicant requested a backdate?

Regular Employee: Does the applicant have regular status? To be checked at a later step in the process

Designated University: Is it a designated educational institution? To be checked at a later step in the process

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Estimated Total 100%: The sum of tuition and books. If the estimated total exceeds the funding maximum for the applicant's specific educational program, the funding maximum is entered instead

Funding Maximum: Based on the applicant's educational program. It is \$5000 for diplomas, bachelor degrees, and certificates (including Masters Certificates) and \$7500 for Masters and Doctoral degrees (including CMA)

Notes: If there is anything unusual about the application, this gets noted here. This includes if there is anything missing, any data that needs to be clarified, or anything in need of resolution

Employee number/Email Address: Self-explanatory

Requested Missing Info: This is the date upon which the PLS Administrator requests any missing information or documentation from an applicant

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3) Check Applications for Completion and Data Integrity

1. Check the application for completion during data entry.
2. Every application must include:
 - a. Both pages of the application itself
 - b. A short letter from the applicant
 - c. A letter of support from their supervisor
 - d. Their most recent EPDP or equivalent performance evaluation documentation

If the application is a renewal:

1. The applicant must also submit a record of their grades.

This may come in the form of transcripts, though screenshots of an online record are also acceptable.

If anything is missing:

2. Record it in the **Notes** column.

3. Check the application for data integrity

*Applicants often make simple mistakes while filling out the application form. If anything is in need of clarification, record it in the **Notes** column.*

4. Ensure that both pages of the application are signed by both the applicant and their supervisor.

*If the application is missing a signature, record it in the **Notes** column.*

5. If any of the above are in need of resolution, contact the applicant by email and request the missing documentation/information.

*Record the date of the request in the **Requested Missing Info** column.*

6. When all of the problems with the application are resolved, reflect it in the **Notes** column.

*Put the date of resolution in the **Received Missing Info** column.*

3. If the applicant is not able to produce the required information or documentation by the absolute cut-off date, the administrator will:
 - a. mark them in the **Group** column as Denied
 - b. change the text color in the row to red
 - c. move the row to the "Not Approved" worksheet

4. Once all of the applications have been resolved, continue on to the next step.

4) **Verify Applicants are still with Government**

1. **Check to make sure that all of the applicants are still with government.**

Contact the BCPSA Executive Office (currently Yvonne Slater) to see who can do the check. Once the person is identified, forward to them the list of applicant names including organization and employee number information, and they will run the check.

5) Verify Regular Employee Status

1. Check to make sure that all of the applicants are regular employees.

Submit a request to Corporate Reporting, part of the Business Performance division, (currently Allan O'Neill) and send them the list of applicant names including organization and employee number information, and they will run the check.

6) Verify that Applicants do not already have an active Pacific Leaders Scholarship

Example: May 2011 intake compare names to Oct 10 and Jan 11 and look for any duplicates

Formatted: No bullets or numbering

1. To make this check, you must:
 - a. Compare the current intake's applicant list to the previous two **(Master list)** to see if there are any instances of overlap.
 - b. If any are located, check the specific intake's spreadsheets to see if the applicant(s) in question had been backdated.

If any overlapping scholarships are found, then the applicant is considered ineligible.

7) Confirm that all Institutions are Designated Educational Providers **(while entering)**

1. Confirm that all applicants have chosen a designated educational institution by:
 - a. Identify questionable institutions
 - b. Use Student AID BC's designated schools search tool, found here: [StudentAidBC website.](#)

Please note that there are a few providers that are acceptable but don't appear via the tool, including Certified General Accountants Association of BC, Certified Management Accountants Association of BC, the Certified Financial Analyst Institute, and the Canadian Institute of Chartered Accountants.

- c. If an applicant's institution is identified as ineligible then:
 - a. Inform the applicant that their application has been denied
 - b. Inform them that they can apply to have their institution designated via these [forms](#)

8) Confirm that the Applicant's Certification is Aligned with Government's Needs **(while entering)**

1. For any unusual certifications/designations, the program administrator must determine whether or not it is considered to be useful for the needs of government.

In some cases, it will be obvious that the designation is ineligible but sometimes an employee pursuing an unusual designation will be part of an organization's plan. If this is suspected, move on to the next step.

2. Contact the applicant's ministry/organizational scholarship program representative to either confirm or disconfirm the suitability of the employee's chosen designation.

9) Confirm Applicant's GPA for all Renewals (while entering)

1. For all renewal applications it must be confirmed that the applicant is meeting the minimum grade point average or above, to do this the administrator must:
 - a. Check the transcripts/record of grades for all renewing applicants to see if they meet the standard minimum GPA of 60%.
 - b. If an applicant's grades fall below the minimum, you must consult with their ministry/organizational scholarship program representative to confirm whether the organization will continue to support their employee or not, despite their grades.
 - c. If they agree to support the applicant, then processing continues.

10) Inform All Ineligible Applicants of their Disqualification

1. Inform all applicants who were rendered ineligible that their application for a scholarship has been denied.

Always make sure that this is reflected on the spreadsheet.

11) Process the Backdating Requests

1. For all instances where an applicant has requested to have their application backdated, contact their ministry/organizational scholarship program representative to confirm whether or not the backdating of their application is supported.

If support is not granted for the backdate, inform the applicant of the decision, and verify whether they want to go forward with the application with the standard scholarship year. If not, withdraw them from the program and update the spreadsheet to reflect this.

12) Create a Briefing Note for the Approval of Scholarship Applicants

1. The most efficient way to start the Pacific Leaders briefing note is to use a previous version (found within the briefing note subfolder within the most recent intake folder in the M:\Human Resources\Scholarships location) as a template and then:
 - a. Clear out all of the numbers, totals, dates and dollar values but leaving intact the individual intake summaries of previous intakes in the **Background** section as they will not have changed.
 - b. Add a summary of the current intake to the **Background** section, displaying the date of the intake and the amount of suggested approvals and denials.

There are four categories that the designations must be divided into:

- *Certificate/Diplomas*
- *Bachelors*

created. You can find previous spreadsheets within their specific intake folders found in the folder M:\Human Resources\Scholarships.

- b. Create a second tab in the spreadsheet with the same column headings to display the application data of applicants who are not approved.
- c. Enter the data into the spreadsheet, one row per application.

The following is a guide to entering data in the various columns:

Renewal: Is it a renewal? (Yes/No)

First Name/Last Name: Self-explanatory

Address: Use a consistent format when entering addresses due to the sensitivity of the mailout of the congratulatory letters from the Deputy Minister to the Premier. If provided with both a street address and PO Box information, always use the PO Box.

City/Province/Postal Code: Self-explanatory

Corporation: The name of the applicant's ministry or organization. Ensure it's correct and current.

Branch/Supervisor: Self-explanatory

Course: The applicant's program. Be consistent with program names

Designated Educational Institution: The applicant's institution, to be confirmed as eligible at a later step

Backdated Request: Has the applicant requested a backdate?

Regular Employee: Does the applicant have regular status? To be confirmed at a later step in the process

Estimated Tuition 100%/Estimated Books 100%: The amounts that the applicant has entered for tuition and books on application form

Estimated Total 100%: The sum of tuition and books. If the estimated total exceeds the funding maximum for the applicant's specific educational program, the funding maximum is entered instead

Funding Maximum: Based on the applicant's educational program. It is \$5000 for diplomas, bachelor degrees, and certificates (including Masters Certificates) and \$7500 for Masters and Doctoral degrees (including CMA)

Notes: If there is anything unusual about the application, this gets noted here. This includes if there is anything missing, any data that needs to be clarified, or anything in need of resolution

Employee phone number/Email Address: Self-explanatory

Requested Missing Info: This is the date upon which the PLS Administrator requests any missing information or documentation from an applicant

Received Missing Info: The date upon which any missing information or documentation was received/resolved

3) Check Applications for Completion and Data Integrity

1. As above, check the application for completion during data entry.
2. Every application must include:
 - a. Both pages of the application itself

Comment [DT1]: Do we get both here or is it a one or the other scenario?

Comment [J2]: Both - there are 2 separate columns

- b. A short letter written from the applicant supporting their application (no more than 500 words). The letter should outline the ways in which the program will support the career and contribute to the priorities of the BC public service.
- c. A letter of support from their supervisor
- d. Their most recent EPDP or equivalent performance evaluation documentation

Comment [DT3]: Be a bit more specific please

Comment [J4]: Done

If the application is a renewal:

1. The applicant must also submit a record of their grades.

Note: This may come in the form of transcripts, though screenshots of an online record are also acceptable.

If anything is missing:

2. Record it in the **Notes** column.
3. Check the application to make sure it is complete, eligible and we have all required documents.

Comment [DT5]: Be more specific or I wonder if this has already been covered in the previous section?

*Applicants often make simple mistakes while filling out the application form. If anything is in need of clarification, record it in the **Notes** column.*

4. Ensure that both pages of the application are signed by both the applicant and their supervisor.

*If the application is missing a signature, record it in the **Notes** column.*

5. If any of the above are in need of resolution, contact the applicant by email and request the missing documentation/information. (Usually give them 5 days to receive missing information)

*Note: Record the date of the request in the **Requested Missing Info** column.*

6. When all of the problems with the application are resolved, reflect it in the **Notes** column.

*Note: Put the date of resolution in the **Received Missing Info** column.*

7. If the applicant is not able to produce the required information or documentation by the cut-off date, the administrator will:
 - a. Applications cannot be forwarded, ask the applicant if they want the application returned or destroyed.
 - b. If returned, then move name from the "current intake" sheet to the "returned" sheet with reason

8. Once all of the applications have been resolved, continue on to the next step.

4) Verify Regular Employee Status

1. Check to make sure that all of the applicants are regular employees.

Note: Submit a request to Corporate Reporting, part of the Business Performance division, (currently Allan O'Neil) and send them the list of applicant names including organization and employee number information, and they will run the check.

5) Verify that Applicants do not already have an active Pacific Leaders Scholarship

1. To make this check:
 - a. Compare the current intake's applicant list to the previous two (Master list) to see if there are any instances of overlap.
 - b. If any are located, check the specific intake's spreadsheets to see if the applicant(s) in question had been backdated.

Note: If any overlapping scholarships are found, then the applicant is considered ineligible. If you find a duplicate contact applicant to verify if they have not used any of the scholarship funds. Then what would we do?

6) Confirm that all Institutions are Designated Educational ~~Providers~~ Institution (while entering)

1. Confirm that all applicants have chosen a designated educational institution by:
 - a. Check designated educational institutions
 - b. Use Student AID BC's designated schools search tool, found here: [StudentAidBC website.](#)

Note: that that there are a few providers that are acceptable but don't appear via the tool, including Certified General Accountants Association of BC, Certified Management Accountants Association of BC, the Certified Financial Analyst Institute, and the Canadian Institute of Chartered Accountants.

- c. If an applicant's institution is identified as ineligible then:
 - i) Inform the applicant that their application has been denied
 - ii) Inform them that they can apply to have their institution designated via these [forms](#)
 - iii) Applications cannot be forwarded, ask the applicant if they want the application returned or destroyed.
 - iv) If returned, then move name from the "current intake" sheet to the "returned" sheet with reason

7) Confirm that the Applicant's Certification is Aligned with Government's Needs (while entering)

1. For any unusual certifications/designations, the program administrator in consultation with the manager must determine whether or not the program is in alignment with the needs of government.

In some cases, it will be obvious that the designation is ineligible but sometimes an employee pursuing an unusual designation will be part of an organization's plan. If this is suspected, move on to the next step.

2. Contact the applicant's ministry/organizational scholarship program representative to confirm the suitability of the employee's chosen designation.
3. If it's not Applications cannot be forwarded, ask the applicant if they want the application returned or destroyed.
4. If returned, then move name from the "current intake" sheet to the "returned" sheet with reason.

Comment [DT6]: This update is not correct, let's chat. thx

Comment [j7]: Maybe change to Does career path meet government needs?

8) Confirm Applicant's GPA for all Renewals (while entering)

1. ~~For all renewal applications it must be confirmed that the applicant maintain 60% or passing grade as defined by their educational institution.~~
 - a. Check the transcripts/record of grades for all renewing applicants to see if they meet the 60% or passing grade as defined by their educational institution
 - b. If an applicant's grades fall below the minimum, you must consult with their ministry/organizational scholarship program representative to confirm whether the organization will continue to support their employee or not, despite their grades.
 - c. If they agree to support the applicant, then processing continues.
 - d. If not, then inform applicant, renewal application is denied.
 - e. Ask the applicant if they want the application returned or destroyed.
 - f. If to be returned, then move name from the "current intake" sheet to the "Returned" sheet with reason.

Comment [DT8]: This up-date is incomplete. thx

9) Inform All Ineligible Applicants of their Disqualification

1. Inform all applicants who were rendered ineligible that their application for a scholarship has been denied.
2. Ask the applicant if they want the application returned or destroyed.
3. If to be returned, then move name from the "current intake" sheet to the "Returned" sheet with reason.

10) Process the Backdating Requests

For all instances where an applicant has requested to have their application backdated.

1. Contact their ministry/organizational scholarship program representative to confirm whether or not the backdating of their application is supported.
2. If Approved, the application goes back into general application process.
3. If not approved, ask the applicant if they want the application returned or destroyed.
4. Then move name from the "current intake" sheet to the "Returned" sheet with reason.

11) Create a Briefing Note for the Approval of Scholarship Applicants

1. The most efficient way to start the Pacific Leaders briefing note is to use the previous version (found within the briefing note subfolder within the most recent intake folder in the M:\Human Resources\Scholarships location) as a template and then:

created. You can find previous spreadsheets within their specific intake folders found in the folder M:\Human Resources\Scholarships.

- b. Create a second tab in the spreadsheet with the same column headings to display the application data of applicants who are not approved.
- c. Enter the data into the spreadsheet, one row per application.

The following is a guide to entering data in the various columns:

Renewal: Is it a renewal? (Yes/No)

First Name/Last Name: Self-explanatory

Address: Use a consistent format when entering addresses due to the sensitivity of the mailout of the congratulatory letters from the Deputy Minister to the Premier. If provided with both a street address and PO Box information, always use the PO Box.

City/Province/Postal Code: Self-explanatory

Corporation: The name of the applicant's ministry or organization. Ensure it's correct and current.

Branch/Supervisor: Self-explanatory

Course: The applicant's program. Be consistent with program names

Designated Educational Institution: The applicant's institution, to be confirmed as eligible at a later step

Backdated Request: Has the applicant requested a backdate?

Regular Employee: Does the applicant have regular status? To be confirmed at a later step in the process

Estimated Tuition 100%/Estimated Books 100%: The amounts that the applicant has entered for tuition and books on application form

Estimated Total 100%: The sum of tuition and books. If the estimated total exceeds the funding maximum for the applicant's specific educational program, the funding maximum is entered instead

Funding Maximum: Based on the applicant's educational program. It is \$5000 for diplomas, bachelor degrees, and certificates (including Masters Certificates) and \$7500 for Masters and Doctoral degrees (including CMA)

Notes: If there is anything unusual about the application, this gets noted here. This includes if there is anything missing, any data that needs to be clarified, or anything in need of resolution

Employee phone number: Self-explanatory

Email Address: Self-explanatory

Requested Missing Info: This is the date ~~upon which~~ the PLS Administrator requests any missing information or documentation from an applicant

Received Missing Info: The date ~~upon which~~ any missing information or documentation was received/resolved

3) Check Applications for Completion and Data Integrity

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1. As above, check the application for completion during data entry.
2. Every application must include:
 - a. Both pages of the application itself
 - b. A short letter written from the applicant supporting their application (no more than 500 words). The letter should outline the ways in which the program will support the career and contribute to the priorities of the BC public service.
 - c. A letter of support from their supervisor
 - d. Their most recent EPDP or equivalent performance evaluation documentation

If the application is a renewal:

1. The applicant must also submit a record of their grades.

Note: This may come in the form of transcripts, though screenshots of an online record are also acceptable.

If anything is missing:

2. Record it in the **Notes** column.
3. Check the application to make sure it is complete, eligible and we have all required documents.

Comment [DT1]: Be more specific or I wonder if this has already been covered in the previous section?

*Applicants often make simple mistakes while filling out the application form. If anything is in need of clarification, record it in the **Notes** column.*

4. Ensure that both pages of the application are signed by both the applicant and their supervisor.

*If the application is missing a signature, record it in the **Notes** column.*

5. If any of the above are in need of resolution, contact the applicant by email and request the missing documentation/information. (Usually give them a maximum of five days to receive provide missing information)

*Note: Record the date of the request in the **Requested Missing Info** column.*

6. When all of the problems with the application are resolved, reflect it in the **Notes** column.

*Note: Put the date of resolution in the **Received Missing Info** column.*

7. If the applicant is not able to produce the required information or documentation by the cut-off date, ~~the administrator will:~~
 - a. Applications cannot be forwarded so ask the applicant if they want the application returned or destroyed. Ensure this conversation takes place via email so there is a written record.
 - b. if returned, then move name from the "current intake" sheet to the "returned" sheet with reason
8. Once all of the applications have been resolved, continue on to the next step.

Comment [DT2]: Is there any way you wouldn't move the name into the "returned sheet"?

4) Verify Regular Employee Status

1. Check to make sure that all of the applicants are regular employees. Only regular employees are eligible for the program.

Note: Submit a request to Corporate Reporting, part of the Business Performance division, (currently Allan O'Neil) and send them the list of applicant names including organization and employee number information, and they will run the check.

5) Verify that Applicants do not already have an active Pacific Leaders Scholarship

1. To make this check:
 - a. Compare the current intake's applicant list to the previous two (Master list) to see if there are any instances of overlap.
 - b. If any are located, check the specific intake's spreadsheets to see if the applicant(s) in question had been backdated.

Note: If any overlapping scholarships are found, then the applicant is considered ineligible. ~~if you find a duplicate contact applicant to verify if they have not used any of the scholarship funds~~ Then what would we do?

Return application as outlined above.

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6) Confirm that all Institutions are Designated Educational ~~Providers~~ Institution (while entering)

1. Confirm that all applicants have chosen a designated educational institution by:

- ~~a. Check designated educational institutions using~~
- ~~b. a. Use Student AID BC's designated schools search tool at found here:~~
StudentAidBC website.

Note: ~~that that t~~ There are a few providers that are acceptable but don't appear via the tool, including Certified General Accountants Association of BC, Certified Management Accountants Association of BC, the Certified Financial Analyst Institute, and the Canadian Institute of Chartered Accountants. Only those listed here are permitted exceptions.

- ~~c. b.~~ If an applicant's institution is identified as ineligible then:
 - i) Inform the applicant that their application has been denied
 - ii) Inform them that they can apply to have their institution designated via these forms

- ~~iii) Applications cannot be forwarded, ask the applicant if they want the application returned or destroyed.~~
~~iv) iii) If returned, then move name from the "current intake" sheet to the "returned" sheet with reason. proceed as above~~

7) Confirm that the Applicant's Certification is Aligned with Government's Needs (while entering

1. For any unusual certifications/designations, the program administrator in consultation with the manager must determine whether or not the program is in alignment with the needs of government.

In some cases, it will be obvious that the designation is ineligible but sometimes an employee pursuing an unusual designation will be part of an organization's plan. If this is suspected, move on to the next step.

2. Contact the applicant's ministry/organizational scholarship program representative to confirm the suitability of the employee's chosen designation.
- ~~3. If it's not Applications cannot be forwarded, ask the applicant if they want the application returned or destroyed.~~
- ~~4. 3. If returned, then move name from the "current intake" sheet to the "returned" sheet with reason. proceed as above.~~

8) Confirm Applicant's GPA for all Renewals (while entering)

1. ~~For all renewal applications it must be confirmed that the applicant maintain 60% or passing grade as defined by their educational institution:~~
 - ~~a. 2. Check the transcripts/record of grades for all renewing applicants to see if they meet the minimum program requirements of 60% or passing grade as defined by their educational institution, whichever is higher.~~
 - ~~b. 3. If an applicant's grades fall below the minimum, you must consult with their ministry/organizational scholarship program representative to confirm whether the organization will continue to support their employee or not, despite their grades.~~
 - ~~c. 4. If they agree to support the applicant, then processing continues.~~
 - ~~d. If not, then inform applicant, renewal application is denied.~~
 - ~~e. Ask the applicant if they want the application returned or destroyed.~~
 - ~~f. 5. If to be returned, then move name from the "current intake" sheet to the "Returned" sheet with reason. Proceed as above.~~

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9) Inform All Ineligible Applicants of their Disqualification

- ~~1. Inform all applicants who were rendered ineligible that their application for a scholarship has been denied.~~
- ~~2. Ask the applicant if they want the application returned or destroyed.~~
- ~~3. If to be returned, then move name from the "current intake" sheet to the "Returned" sheet with reason.~~

created. You can find previous spreadsheets within their specific intake folders found in the folder M:\Human Resources\Scholarships.

- b. Create a second tab in the spreadsheet with the same column headings to display the application data of applicants who are not approved.
- c. Enter the data into the spreadsheet, one row per application.

The following is a guide to entering data in the various columns:

Renewal: Is it a renewal? (Yes/No)

First Name/Last Name: Self-explanatory

Address: Use a consistent format when entering addresses due to the sensitivity of the mailout of the congratulatory letters from the Deputy Minister to the Premier. If provided with both a street address and PO Box information, always use the PO Box.

City/Province/Postal Code: Self-explanatory

Corporation: The name of the applicant's ministry or organization. Ensure it's correct and current.

Branch/Supervisor: Self-explanatory

Course: The applicant's program. Be consistent with program names

Designated Educational Institution: The applicant's institution, to be confirmed as eligible at a later step

Backdated Request: Has the applicant requested a backdate?

Regular Employee: Does the applicant have regular status? To be confirmed at a later step in the process

Estimated Tuition 100%/Estimated Books 100%: The amounts that the applicant has entered for tuition and books on application form

Estimated Total 100%: The sum of tuition and books. If the estimated total exceeds the funding maximum for the applicant's specific educational program, the funding maximum is entered instead

Funding Maximum: Based on the applicant's educational program. It is \$5000 for diplomas, bachelor degrees, and certificates (including Masters Certificates) and \$7500 for Masters and Doctoral degrees (including CMA)

Notes: If there is anything unusual about the application, this gets noted here. This includes if there is anything missing, any data that needs to be clarified, or anything in need of resolution

Employee phone number Self-explanatory

Email Address: Self-explanatory

Requested Missing Info: This is the date the PLS Administrator requests any missing information or documentation from an applicant

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3) Check Applications for Completion and Data Integrity

1. As above, check the application for completion during data entry.
2. Every application must include:
 - a. Both pages of the application itself
 - b. A short letter written from the applicant supporting their application (no more than 500 words). The letter should outline the ways in which the program will support the career and contribute to the priorities of the BC public service.
 - c. A letter of support from their supervisor
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If the application is a renewal:

1. The applicant must also submit a record of their grades.

Note: This may come in the form of transcripts, though screenshots of an online record are also acceptable.

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*Note: Record the date of the request in the **Requested Missing Info** column.*

4. When all of the problems with the application are resolved, reflect it in the **Notes** column.

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5. If the applicant is not able to produce the required information or documentation by the cut-off date,;
 - a. Applications cannot be forwarded so ask the applicant if they want the application returned or destroyed. Ensure this conversation takes place via email so there is a written record.
 - b. Then move name from the "current intake" sheet to the "rejected/returned" sheet with reason

6. Once all of the applications have been resolved, continue on to the next step.

4) Verify Regular Employee Status

Comment [DT1]: Is there any way you wouldn't move the name into the "returned sheet"?

Comment [J2]: Not sure what you mean?

1. Check to make sure that all of the applicants are regular employees. Only regular employees are eligible for the program.

Note: Submit a request to Corporate Reporting, part of the Business Performance division, (currently Allan O'Neil) and send them the list of applicant names including organization and employee number information, and they will run the check.

5) Verify that Applicants do not already have an active Pacific Leaders Scholarship

1. To make this check:
 - a. Compare the current intake's applicant list to the previous two (Master list) to see if there are any instances of overlap.
 - b. If any are located, check the specific intake's spreadsheets to see if the applicant(s) in question had been backdated.

Note: If any overlapping scholarships are found, then the applicant is considered ineligible. Return application as outlined above.

6) Confirm that all Institutions are Designated Educational Institution (while entering)

1. Confirm that all applicants have chosen a designated educational institution by:
 - a. Check designated educational institutions using Student AID BC's designated schools search tool at:
[StudentAidBC website.](#)

Note: There are a few providers that are acceptable but don't appear via the tool, including Certified General Accountants Association of BC, Certified Management Accountants Association of BC, the Certified Financial Analyst Institute, and the Canadian Institute of Chartered Accountants. Only those listed here are permitted exceptions.

- b. If an applicant's institution is identified as ineligible then:
 - i) Inform the applicant that their application has been denied
 - ii) Inform them that they can apply to have their institution designated via these [forms](#)
 - iii) Applications cannot be forwarded, proceed as above

7) Confirm that the Applicant's Certification is Aligned with Government's Needs (while entering)

1. For any unusual certifications/designations, the program administrator in consultation with the manager must determine whether or not the program is in alignment with the needs of government.

In some cases, it will be obvious that the designation is ineligible but sometimes an employee pursuing an unusual designation will be part of an organization's plan. If this is suspected, move on to the next step.

2. Contact the applicant's ministry/organizational scholarship program representative to confirm the suitability of the employee's chosen designation.

3. If it's not Applications cannot be forwarded, proceed as above.

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For all instances where an applicant has requested to have their application backdated.

1. Contact their ministry/organizational scholarship program representative to confirm whether or not the backdating of their application is supported.
2. If so, the application goes back into general application process.
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10) Create a Briefing Note for the Approval of Scholarship Applicants

1. To start the Pacific Leaders briefing note, use the previous version (found within the briefing note subfolder within the most recent intake folder in the M:\Human Resources\Scholarships location) as a template and then:
 - a. Clear out all of the numbers, totals, dates and dollar values but leave intact the individual intake summaries of previous intakes in the **Background** section as they will not have changed.
 - b. Add a summary of the current intake to the **Background** section, displaying the date of the intake and the amount of suggested approvals and denials.

There are four categories that the designations must be divided into:

 - i) *Certificate/Diplomas*
 - ii) *Bachelors*
 - iii) *Masters*
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 - c. Calculate and summarize all of the required business intelligence, including:
 - i) The total number of each degree.
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2. Contact the applicant's ministry/organizational scholarship program representative to confirm the suitability of the employee's chosen designation.
3. If it's not Applications cannot be forwarded, proceed as above.

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10) Create a Briefing Note for the Approval of Scholarship Applicants

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 - a. Clear out all of the numbers, totals, dates and dollar values but leave intact the individual intake summaries of previous intakes in the **Background** section as they will not have changed.
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 - v) The total number of applications encompassing all four categories, and the total number of all new and renewal applications.
 - vi) The Grand Total (maximum dollar commitment) of the four subtotals.

Scholarships for Public Servants

Manual

- If your **employment is terminated**, your participation in the program is cancelled immediately and your deferred funds are paid out that same calendar year.
- If you **die** while a participant in the Program, the deferred funds will be paid to the beneficiary specified on your DSLP application form.

Policy On Deferred Leave and Pac Leaders

(Email from Sean Gadsby)

From: Hucal, Jackie PSA:EX
Sent: Tuesday, August 2, 2011 8:05 AM
To: Gadsby, Sean C PSA:EX
Subject: Policy Question - Pacific Leaders Scholarships Program for Public Servants

Hi Sean,

I hope you can help me with a question we received here at Pacific Leaders, we have never had this question before.

If someone is on the Deferred Salary Leave Program (DSLP) are they eligible for a scholarship?

In our Pacific Leaders Scholarship FAQ's we have this question/answer for Maternity leave:

13. Are employees on maternity leave eligible to receive a Scholarship?

Yes, an employee on maternity leave may apply for and receive a Scholarship, start or continue an educational program, and receive reimbursement for money spent on tuition and books.

If you agree that they are eligible, we will then change our FAQ's to say "Maternity/Deferred Salary Leave Program"

Are there any other kinds of leave that we should be aware of?

I look forward to your response.

Thank you.

Jackie Hucal, Program Administrator
 The Learning Centre | BC Public Service Agency | 3rd Floor - 940 Blanshard Street
 Victoria, BC V8W 2H2 | tel: 250-356-5182 fax: 250-387-0749

From: Gadsby, Sean C PSA:EX
Sent: Wednesday, August 3, 2011 11:24 AM
To: Hucal, Jackie PSA:EX
Cc: Thomson, Drew PSA:EX; Ponton, Meagan PSA:EX; Weltz, Angela D PSA:EX
Subject: RE: Policy Question - Pacific Leaders Scholarships Program for Public Servants

Hi Jackie,

My view is that someone on the DSLP should be eligible for the PL scholarship program. The FAQ's on the PL website establish some relevant eligibility criteria:

M:\The Learning Centre\2. Admin, Facilities & Ops\Pacific Leaders\Applications of Interest\FOI - General\Records for FOI PSA-2013-00257\Research on Programs & Institutions.docx

Intakes

Last printed December 3, 2013

Who is eligible for this program? Full time and part time regular BC government employees who are covered under the Public Service Act and have passed their six month probationary period are eligible.

Why are auxiliary or casual employees ineligible for a scholarship? Only regular employees are eligible because Scholarship recipients must commit to continuing to work for a specified period of time for the BC Public Service after they receive the Scholarship. Since auxiliary employees are employed for a specified term only, they are not in a position to make this commitment to a "return of service". Auxiliaries and new employees are encouraged to consider the program after they achieve regular employee status.

If an employee is on long term leave without a planned return to work date, are they eligible to receive a scholarship? No, an employee would not be eligible as they could not commit to the return to service obligation. Once the employee has returned to work, they are eligible to apply as long as all other criteria are met.

Taken together, seems to me the main point is that a regular employee considering any type of leave should in principle be eligible for the scholarship program provided: (i) the leave is for a fixed period; (ii) the employee understands (and can commit to) the return of service obligation expected at the completion of their studies/leave and; (iii) the employee understands the implications of not completing their return of service obligation. The DSLP would meet this test given the leave is for a specified period (similar to mat leave) as would any other leave involving a fixed return to work date. Of course, the employee would also need to seek approval for any such arrangement from their employer.

All that said, this is just my view based on existing eligibility criteria. Amending your eligibility criteria and FAQs to include the DSLP (or other forms of paid or unpaid leave involving a fixed return to work date) is something to be sorted out as a matter of program administration.

Hope this helps.

Sean Gadsby, Policy Analyst

Policy and Research Branch | Employee Relations Division | BC Public Service Agency
810 Blanshard St. | Victoria, BC | V8W 9V1 | 250 356-9731



Where ideas work

**Scholarships for
Public Servants**

Intake Manual

November 21, 2013

Before the Intake Closes

- ❖ Paper and envelopes for letters from Office of the Premier
 - Order paper, if required. Paper stock number is #7530681002 from DCV (Distribution Centre Victoria)
 - This is ordered through the Learning Centre Branch Coordinator¹
 - There is a supply of paper in the upper filing cabinet to the left of the administrator's desk
- ❖ Confirm the "Out of Office" message on the Pacific Leaders Mailbox reflects the current stage of the intake. If you need to change the message, you must be in the Pacific Leaders Mailbox (not the view where you can see both your own mailbox and the Pacific Leaders, but the Pacific Leaders mailbox alone). See the "How To" section of the manual for information about how to change the message.
- ❖ Contact backdated applicants who are required to reapply for the open intake so that they do not have to submit another backdated application (ie: Applied at October 2012 and approved as backdated, would need to reapply in May 2013 to avoid submitting another backdated application request)
- ❖ Email the ministry/organization contacts listing to all current contacts, they may advise of changes at that time and it will be of use once the intake has closed for them to know who to contact if they need to go to another ministry directly.

Sample backdated application renewal reminder email (draft in Pac Leaders Outlook drafts):

Good Afternoon,

This is a reminder that while your last Pacific Leaders Scholarship for Public Servants program application (in the October 2012 intake) was backdated, backdating is not generally approved more than once and therefore your renewal application is due May 31, 2013 should you wish to continue studies in September 2013. If you do not reapply for the May 2013 intake your scholarship will **expire August 31, 2013**.

Please see the [website](#) and [FAQ's](#) for the renewal application requirements and the application form. Please note that renewal applications also require a copy of an unofficial transcript.

Lastly, please be reminded that the ministry requires a copy of your grades for courses supported by Pacific Leaders to ensure successful completion (a 60% minimum). If you haven't already sent in your marks, please do so.

Let me know if you have any questions or require any clarification.

Thank you,

During the Intake

Screening Applications

¹ See Intake Contacts list at the end of this section for name and contact information

- ❖ Applications come in by mail, email, fax, by hand and - at the end of the intake - in bundles from the ministries who pre-screen their applicants.
- ❖ Date stamp each application with the date received if only hardcopy version is received.
- ❖ Write the intake period in felt in the top right corner of the application of hardcopies received.
- ❖ Each application package should include the following:
 1. Application form
 2. Letter from applicant, signed
 3. Letter from applicant's supervisor, signed
 4. Copy of performance profile
 5. Transcript (renewal applications only)
 - Note: extraneous documents should be shredded (e.g. fax cover page, resumes etc.)
- ❖ **Application form** - check that:
 - Ministry is not one that requires pre-screening (if so, and the pre-screen has not been done, application must be returned as detailed in the Ministry Screening section below)
 - Backdated applications
 - Some applicants will indicate in their email that they are requesting an application to be backdated.
 - Email the ministry contact and confirm they are in agreement with backdating the application. You should scan the application and attach it, so the contact has the information on the applicant
 - Attach email stating ministry's okay to the application package and mark "Backdated" on the front page of the application to ensure you do not miss this when entering the application in to the database.
 - Some applications, especially those coming from ministries who pre-screen, may already have letters or forms indicating this permission
 - All fields filled out and that they are legible. Make sure the branch name is filled in.
 - The applicant has selected "No" in the field "Are you in receipt of any other scholarships". If the applicant has selected "Yes" bring this to the attention of the Team Lead.
 - Correct intake date.
 - University of choice is an eligible institution
 - Must be designated as eligible by StudentAid BC (Ministry of Advanced Education)
 - To search a university, go to https://www.aved.gov.bc.ca/sfas-bin/phcgi?PH_APP=SFASAPP&PH_QKC=phw_des_schl01.QKC&PH_HTML=%20phw_des_schl01.HTM and enter the name of the institution
 - Course of study chosen meets the needs of government and is a developmental rather than job-related program
 - For any unusual certifications/designations, the administrator should consult with the manager, as well as the applicant and their supervisor, to determine the eligibility for Pacific Leaders
 - Check that the program is not a requirement of the employee's position, as they would then be considered job-related. For further clarification on this, see the Learning & Development policy on MyHR, found at <http://www2.gov.bc.ca/myhr/article.page?ContentID=5e3ba7ea-410d-0aef-b0d5-49b57971939a>
 - Course of study is a certificate, diploma or degree. Individual courses are not eligible if the applicant is not enrolled in a program. Graduate certificate programs are still only funded at the certificate level.
 - If the application is a renewal check on the master list when their previous scholarship was awarded to make sure they are eligible to reapply. At least one year must have passed since their last application.
 - Signatures – signed and dated by both applicant and supervisor.
- ❖ **Letter from applicant:**
 - Read it over to make sure everything is in order and makes sense.
 - Check it is signed and the date is current.

❖ **Letter of recommendation from supervisor:**

- Read it over to make sure everything is in order and makes sense.
- Ensure there are no indicators that the course of study chosen is job-related.
- Ensure the supervisor's name on the letter matches the name of the supervisor on the application.
- Check it is signed and the date is current.

❖ **Copy of performance profile:**

- Ensure it is a current performance profile (not last year's – currently 2012/2013. The dates referenced should be future dates).
- Check that the specific course of study is mentioned in the "Learning Goals" section.
- Read it over to ensure there are not any issues of poor performance.

❖ **Transcripts:** Applications that are renewals require a transcript for the course of study taken on the last application.

- Check to make sure all grades for the course of study taken on the last application are passing level:
 - This does not have to be an official, sealed transcript from the institution however it does need to state the name of the institution and be clearly identifiable as originating from an official institution.
 - Screenshots of marks are also acceptable – this should have the name of the institution clearly visible.
 - Marks must be shown – a narrative from the applicant or their instructor saying they passed is not sufficient.
 - Marks must be at least 60%
 - Marks from some institutions are shown in formats other than percentage. There is a file folder labeled "Grading Scales" in the folder stand to the left of the computer at the workstation. If there is no guide accompanying the transcript check the folder to see if there is one for that institution. If not, ask the applicant to provide one. When they do make put a copy in the file folder.
 - If there are marks in the last scholarship year that are below the level above, follow-up is required:
 - Ask the applicant to provide written proof that either the applicant was not reimbursed by the ministry for this course or they have paid back the money for any course they did not complete or failed.
 - If the applicant was not reimbursed or has paid back the funds for any failed/incomplete course, they may be granted another scholarship.
 - If applicant was reimbursed and has not paid back the funds, they cannot be granted another scholarship until this is done.

❖ **Verify Applicants do not already have an active Pacific Leaders Scholarships for Public Servants**

- Compare the current intake list to the Master list
- If any applicant shows as having a pre-existing scholarship, you need to investigate the details
 - Was previous scholarship backdated?
 - Did applicant withdraw from previous scholarship, and it was not noted on the list? Only approved applications are shown on the Master List, so you must check the database from the intake date.
 - Did applicant not use previous scholarship?
 - If they did not, they could still withdraw from that and be considered for the current intake
 - This must be verified by ministry contact and/or the ministry area that handles the reimbursements
- ❖ If there are any problems, email the applicant right away to explain what is needed and set the application aside with a copy of the email until a solution has been found (e.g. applicant sends missing info, or new document with signatures) If the applicant doesn't resolve the issue within a day or two, keep following up periodically till the application is complete.
- ❖ Once you receive updated documents shred the old ones and replace with the new.
- ❖ The subject line for emails concerning incomplete applications should be "Pacific Leaders Scholarship Application - Incomplete (Name of Applicant)". Any correspondence with applicants regarding incomplete applications should be kept in the inbox. Always BCC the Pac Leaders email on any correspondence then mark as read in the

inbox. Delete previous emails from the same conversation.

- ❖ Please note that it is faster to have the applications updated via email rather than fax or regular mail so your email could include only that option to amend their application.
- ❖ Give people (or the prescreened ministries) a warning or their application will no longer be considered.

Sample Email:

Subject: Pacific Leaders Application Incomplete

Hello {employee first name}

Upon review, your Pacific Leaders Scholarships for Public Servants application package for the January 2012 intake was found to be incomplete. You still need to submit a signed letter from your current supervisor. Although you have provided three letters of reference, none of them is from Barb Clements, who is shown as your current supervisor.

We will require the missing documentation in order to process your application and move it forward for approval. Please submit this documentation to us no later than Tuesday, January 31st, 2012 or we will be required to remove your application from consideration. Please be aware that you may submit the missing documentation by regular mail, fax (250-387-0749), email to this mailbox or by dropping it off at our front desk (810 Blanshard Street, Victoria).

Thank you for your interest in Pacific Leaders Scholarships for Public Servants

Ineligible Applications

- ❖ If for whatever reason the application is ineligible, email the applicant informing them and letting them know the reason. If they have sent an original copy by mail ask them if they would like you to mail it back to them or shred it. If they sent an email or fax, inform the applicant you will be deleting/shredding it.
- ❖ Do not enter ineligible applications into the "Approved" tab of the intake's spreadsheet. If you have already done so remove it.
- ❖ Enter the applicant's information on the "Not –Approved" tab of the intake's spreadsheet filling in the fields as appropriate. Enter a detailed explanation of the reason the application was not approved in the Notes field. Add all relevant dates.
- ❖ Certifications or Professional designations are not eligible for a scholarship other than the CGA, CMA and CPA programs. Designations should be re-directed to training and development form and advised that they should consult their supervisor.