



Staff Development Request Form

The Staff Development Request Form tracks staff development and training request funding and supervisor approval for mandatory, required, and elective conferences and training. Operations staff must also have approval by their Superintendent and Director of Operations for requests to attend elective (non-mandatory, non-required) training. This procedure applies to all training requests. Requests submitted that do not follow this procedure may be returned as incomplete. Once section 2. Request and related forms are complete and section 3. Supervisory Assignment, Certification, Approval or Denial has been obtained, forward the Staff Development Request Form and supporting documents to Accounts Payable Box (#2), McLaren Lodge Annex.

1. EMPLOYEE(S) ATTENDING

Print Name(s)	Requested by (Printed)	Signature	Date
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2. REQUEST – Staff Development Event, Funding, Time

Staff Development Event Name (Full)		Start Date and Time
Location (i.e. City, State)	Vendor Name (if provided by CCSF, list Department)	End Date and Time

Describe How This Will Benefit You And The Department

EXPENSE TYPE	COST	PAYMENT			
		UNION REIMBURSEMENT*	UNIT OR DIVISION BUDGET**	EMPLOYEE PAYS***	RPD TRAINING PROGRAM
Registration	\$	\$	\$	\$	\$
Air fare, Lodging, Mileage, Public Transport/Shuttle/Taxi	\$	\$	\$	\$	Not Allowed
Total	\$	\$	\$	\$	\$

*Follow the Online Tuition Reimbursement Process and Requirements on <http://www.sfdhr.org>. Select the "Employees" tab. Complete the online pre-approval process and attach the completed CCSF DHR Tuition Reimbursement Request Form.

** Requires CCSF Employee Expense Preapproval Form, if employee was approved to be reimbursed and Unit or Division budget is charged; complete and submit to Accounts Payable. If approved to pay vendor and charged to Unit or Division budget, prepare Requisition Form, obtain approval and submit to Finance and Purchasing.

*** Employee will pay and will not be reimbursed.

Department required professional certification maintenance? No Yes – If yes, which one: CIH CSP Other (List):

3. SUPERVISORY ASSIGNMENT, CERTIFICATION, APPROVAL or DENIAL

Employee assigned to attend? No Yes – If yes, explain why you are requiring the employee to attend:

ALL REQUESTS – By signing below, the supervisor has indicated the assignment and provided an explanation (if applicable), certifies the employees request is appropriate and accurate, and has indicated approval or denial below.

SUPERVISOR – Print Name and Phone Number	<input type="checkbox"/> Approved <input type="checkbox"/> Denied	Signature	Date
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ELECTIVE REQUESTS – Superintendent and Division Director approval is required for Operations Division staff.

SUPERINTENDENT – Print Name and Phone Number	<input type="checkbox"/> Approved <input type="checkbox"/> Denied	Signature	Date
DIRECTOR OF OPERATIONS <p style="text-align: center;">D. Kern 831-2709</p>	<input type="checkbox"/> Approved <input type="checkbox"/> Denied	Signature	Date

FINANCE USE ONLY	DATE RECEIVED	CORRECT INDEX CODE AND SUB-OBJECT NUMBER <input type="checkbox"/> YES <input type="checkbox"/> NO	DATE TO EHS	EHS USE ONLY	DATE APPROVED	RPU NUMBER
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Approval Process for Staff Development Requests

For a flow chart detailing this process, go to the Employee Expenses Reimbursement Process [link](#) under Reimbursement Forms in the Intranet.

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Identify the course you want or need to complete. You can request a course offered by a trainer you find or a course offered through the Department's Training Catalog. The catalog is available through the RPD intranet (enter *sfirecpark* in the browser line on a computer linked to the Departments intranet, click on the Health and Safety Staff Training links).

Prepare your request.

- 1) Obtain and prepare a Staff Development Request Form.
- 2) **If you plan to use Union Reimbursement per your union's MOU, check your online tuition reimbursement system account** at sfdhr.org, under the Employees tab, and verify your Employee Development Fund and your Organization Allocated Amount has sufficient funds to cover your request.
 - a) To set up a new account call EHS at (415) 831-2780. Provide them with your job classification and DSW ID so that they can request an account be set up for you. Once your account is set up they will send you log in information via email which will include company ID, username, and password.

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- 3) Obtain the brochure, flyer, etc., and estimates for all expenses you plan to request for reimbursement.
 - 4) **Determine how you will pay** for the various expenses. Options include Union Tuition Reimbursement, Supervisors Budget, Employee Paid, and RPD Training program funds.
 - a) Staff Development program funds can be used to pay for course and conference registration costs only. Supervisors budget, union tuition reimbursement, and employee paid funds may also be used to pay for registration costs (all or in part). Staff Development funds cannot be used for travel costs (transportation, food, lodging, etc.).
 - b) Travel costs must be paid for from your supervisor's budget, union tuition reimbursement fund, and or your own funds (employee paid). Travel within the Nine Bay Area counties is not reimbursable for L21 staff.
 - 5) Complete the Staff Development Request Form and Tuition Reimbursement Request Form if applicable. MEA staff does not complete a Tuition Reimbursement Request Form.
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Obtain Pre-Approvals.

- 1) Submit the completed Staff Development Request Form and Tuition Reimbursement Request Form (if applicable) to your supervisor for approval.
- 2) Supervisor, if you are in Operations, and your employee's request is for an elective, submit the Staff Development Request Form to your Superintendant and Director of Operations for review and approval.
 - a) Elective training is non-mandatory and non-required training. Examples of electives include conferences, personal development classes, and professional development classes that are not needed to maintain a certification required by the department.
 - b) Mandatory and required training is identified in the Departments Injury and Illness Prevention Safe Work Practice, the Department's Mandatory Training Report, and by departmental memorandum or directive. Mandatory or required training does not require Superintendent and Director of Operations approval.
- 3) Supervisor, inform your employee if the request is approved or denied. If approved, provide copy of approval to employee.
- 4) Employee, if you are using Union Reimbursement, **log in** to your online tuition reimbursement system account and follow the pre-approval procedures. **Scan and upload** all forms, brochures, flyers, descriptions, estimates, etc., as requested.
- 5) Receive your Tuition Reimbursement Request pre-approval email form DHR and **print it**.
- 6) **Do not complete the class or conference yet!** You still need to complete the Department's Staff Development Request Form pre-approval process.

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- 7) Supervisor, deliver SDR Form and required documents (CCSF employee expense pre-approval form and travel expense voucher) signed by the Authorized Signatory to FINANCE box marked **Accounts Payable** at McLaren Lodge Annex. Plan ahead so that you submit your packet at least **30 days before** the course date.
 - 8) **Receive pre-approval from Environment, Health and Safety.**
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Complete the conference, course or training and obtain evidence of successful completion.

Submit training documentation to EHS for processing to ensure you get credit. Prepare and submit your reimbursement request and get paid.

Definitions

Official Business Travel: To constitute “official business of City and County of San Francisco”, the activities of an officer or employee must clearly demonstrate that there is a valid City and County interest to be served or gained through the travel; and there is:

- Relevance to City and County operations or the individual’s role in such operations; and/or
- The promotion or development of City and County programs, methods or administration; and/or
- Compliance with instructions or authorization of the Mayor or Board of Supervisors.

Professional Certification: By departmental procedure, “Required for maintenance of professional certification” is determined by the professional certification being listed on the on the job class description. Other suitable documentation can be used to satisfy this requirement. By checking yes in this section, the supervisor approving the request is certifying that the training is appropriate for maintenance of the certification cited in the job class description or can provide other suitable documentation to show the requirement of the certification.

Employee assigned to attend? The department is not obligated to pay for any staff development expense unless the training is required as described in Professional Certification above. This includes providing time to attend a staff development event during regular work hours and getting paid for that time. By checking “No” the supervisor is indicating that the employee is being allowed to attend the training but not on work time. By checking “Yes” the supervisor is indicating that the employee is being assigned to attend and that all allowable expense as described in Professional Certification and Official Business Travel are being requested to be paid by the Department.

Please direct any questions about this document to EHS at (415) 831-2780 or Maria Sutton (maria.sutton@sfgov.org).

Thank you!