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Global Individual Development Benefit | Policy

POLICY OWNER:	Human Resources
POLICY APPROVED BY:	Associate Director, Talent and Engagement Solutions, HR
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I. Policy Overview

Policy Statement

Water.org encourages every team member to continue developing knowledge and skills that align to their personal goals and the needs of the organization.

Purpose

The Individual Development Benefit supports this continued growth through the allotment of up to \$500 USD (or equivalent) for each team member.

Applicability

All full-time, permanent employees of Water.org in good performance standing are eligible for Individual Development Benefit each fiscal year.

Governance

The **Human Resources Department** is the owner of this policy and is responsible for administering, reviewing, and making recommendations for updates or changes to this policy in alignment with business needs.

Violations

It is the expectation of Water.org that direct supervisors proactively manage their direct reports' compliance with this Policy. Non-compliance, from an employee or a direct supervisor, may result in progressive disciplinary actions consistent with the organization's established HR procedures.

II. Policy

1. Approved Development Items

- Courses or professional memberships that contribute to the development of skills or competencies as agreed upon with the supervisor, that supports both the individual's development goals and the needs of Water.org.
- Similar offerings should not already be available or in development internally at Water.org.
- Coursework may be completed through traditional classes (e.g., college, university, technical school, conferences, etc.), learning opportunities offered online, or other programs and learning opportunities.
- Required travel to participate in the above activities.

2. Policy Specifics

- Staff should access the online approval form located on the Intranet > Learning page and complete the form in its entirety. HR will follow up within the week related to HR approval and seeking supervisor approval. Once the expense is fully approved, it may be incurred, and expense reimbursement requested via Concur. Expenses should be expenses as a Professional Development expense type, and a comment should be included to note the item is an approved Individual Development Budget expense.
- If the cost of development activity exceeds \$500 US (or equivalent), the remainder will be covered by the team member.
- Employees may redeem drops in Bucketlist (Water.org Rewards) toward additional Individual Development Budget funds (limit one redemption per FY).
- The benefit is limited to five total requests per fiscal year (up to \$500), even if the \$500 US (or equivalent) is not yet met.
- Beginning in Q3, the Learning & Development team will facilitate discussions with team members to reallocate funds from those whose development does not require the benefit to those that may cost more than \$500, to best utilize the budget as applicable.
- Reallocating funds from other budgets to cover individual development expenses is prohibited.
- Funds unused by an employee during a fiscal year do not roll over for use in future years.
- Employees will not receive reimbursement if they voluntarily leave the organization prior to completing a development activity for an incurred development expense. If the expense has already been reimbursed it will be deducted from the final paycheck. Prorated membership dues may also be deducted from the final paycheck.
- In the event an employee goes on an approved leave of absence and is unable to complete an activity for an incurred expense, employee will demonstrate effort to receive reimbursement from vendor as able. Employees will then remain eligible for the benefit for Water.org approved development item.

3. Means of Payment to Provider or Vendor

- Using a personal or corporate card is acceptable.
- If a credit card is required for registration but a team member doesn't have one, L+D may use their card on team member's behalf. This requires that any portion of the cost the employee is responsible for is secured via check or payroll deduction.
- Cash advances will not be provided for development items.
- Global offices only - If a check is the required means of payment, expenses must be coded to Professional Development- HR Budget (Talent Development).

Note: all expenses incurred under the Individual Development Benefit must be coded to Professional Development for reimbursement.

III. Approval and Responsibility

Application for Individual Development Budget funds should be made through the completion of the approval form, located on Water.org's Intranet (Learning > [Global Individual Development Policy and Fund Request](#)).

The request will be routed to Human Resources and the direct supervisor for approval. Once approved, employee may expense and/or request reimbursement for the approved amount via the process outlined above.

IV. Additional Resources

Contact for Support

HR@water.org

Related Policies

N/A

V. Appendices

N/A