POLICIES & PROCEDURES

INTRODUCTION

The Educational Support Program (ESP) was adopted by the Board of Supervisors in April 2006 to meet the County's staffing needs now and in the future by developing the County employee workforce to their full potential. To meet the goals of this plan, the Board centralized the various County educational initiatives for its employees into this one ESP program thus allowing a unified approach to meet workforce needs.

GOALS

Goal 1: To encourage employees to pursue careers and education relevant to the County's needs now and in the future, and especially those related to difficult-to-recruit positions.

Goal 2: To ensure that employees pursue realistic career goals that match their aptitudes and values.

Goal 3: To ensure that neither lack of funds nor lack of direct relevance to a given department will discourage educational support or successful completion of education.

Goal 4: To develop necessary incentives to motivate and retain competent and educated employees.

Goal 5: To focus special emphasis on difficult-to-recruit positions and occupations with targeted fast-track programs.

Goal 6: To maximize the use of available funding sources and partnerships to meet the educational needs of the County's workforce.

PURPOSE

To encourage and facilitate career development through a program whereby employees of the County may be:

A. Reimbursed for the cost of textbooks, tuition, registration, and laboratory fees for courses required to obtain an undergraduate or graduate degree, or a license or certification in an approved Career Development Pla (CDP);
B. Provided with a reduced work schedule while continuing to be paid as a full-time employee, to allow time to complete training or educational requirements for a degree or certification within an approved Career Development Plan (CDP);

C. Provided with alternative support to achieve educational and training goals within an approved Career Development Plan (CDP); and/or
D. Provided with educational loan repayment assistance as a hiring or retention incentive under Section 127 of the Internal Revenue Code.

PROGRAM OVERVIEW

ESP provides educational support through a multi-faceted approach. This program identifies which method is best suited to an employee's identified and agreed-upon career goal to meet with County's workforce needs. Therefore, employees will apply to the program and follow the procedures outlined below to receive funding. The County will work with educational institutions to develop further educational options that will meet County workforce planning needs.

As part of determining the career development plan, ESP Staff may use any of the following to best meet the County's needs:

1. Textbook and Tuition Reimbursement Program: Participants are reimbursed for the costs of textbooks, tuition, and laboratory fees for courses required to obtain an undergraduate or graduate degree, or a license or certification in an approved career development plan.

2. The 20/20 Work-School Program: Employees are provided with a reduced work schedule while continuing to be paid as full-time employees, to allow time to complete field work or clinical hours requirements for a degree or certification. This program is primarily designed to degree programs that require completion of clinical or fieldwork hours, in addition to classroom and study time, to earn the educational degree.

   The basic structure of this program consists of an agreement that the County will provide paid release time for up to three years while the employee attends school full time and continues working at the County for 20 hours per week. In exchange, the employee signs an agreement to continue working at the County on a year-for year basis after completion of their degree or certification. The policies contained herein regarding eligibility, program entry, and eligible coursework apply to this program as well.

Department Commitment – The department will be able to use companion positions or temporary employees through TAP to fill behind those in the 20/20 program.

3. Other Fast-Track Educational Options: Other fast-track programs in partnership with accredited colleges, including focused programs held on-site at the County's facilities, will be developed within the Educational Support Program where possible. Participation in one of those programs may involve a 20/20 schedule, payment of tuition and books, or another combination of monetary support and schedule accommodation, as determined by the Human Resources Director or their designee with the school and sponsoring departments.

ELIGIBILITY

This program is open to the following:

For educational reimbursement, regular full-time employees who have completed their initial probationary period are eligible to apply. In addition, any temporary or Per Diem employee working in a nursing classification in any County agency/department who works a minimum of 520 hours in any fiscal year, may take advantage of the Educational Support Program. Temporary or Per Diem employees regularly scheduled to work less than 36 hours per week are eligible for a pro-rata level of reimbursement.

Employees must have completed their initial probationary period and be in good standing with no documented performance or behavioral issues for the past 12 months from the date of the ESP Application.

ESP staff will develop partnerships with accredited colleges and universities and specific programs for the internship program.

PROCEDURES

1. Interested employees will complete and return the Educational Support Program Application to the Human Resources (HR) Department ESP staff, with proper signature authorizing participation in the application process and verifying that the employee is in good standing and has completed the initial probationary period.

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2. Applications will be processed by ESP staff. The following criteria will be utilized by staff to determine priority:
    - County needs, including designated difficult-to-recruit classifications
    - Date received in Human Resources
    - Likelihood of success
    - Funding availability
    - Employment status
    - Other priorities as determined

3. Based on the above priorities, ESP staff will contact employees to schedule the employee for a career assessment test. The participant cannot continue to the next step without completing the required testing approved by the ESP.

4. After completion of the career assessment, the ESP staff will provide a link for the employee to schedule an appointment with an ESP Career Counselor. At this meeting, the counselor and the employee will:
    - Review the results of the career assessment
    - Review educational transcripts of any college coursework completed
    - Review educational options and support programs available
    - Review employee responsibilities and funding documentation requirements
    - Discuss job shadowing and career research resources, if needed

5. If the employee is identified as a “best fit” for the career goal, has successfully completed 12 semester / 16 quarter units with a minimum overall G.P.A. of 2.5 and all required documentation is provided by the employee, the Career Counselor will develop a Career Development Plan which will outline the County career goal, degree program, educational institution, number of units needed to complete degree program, each course required to earn degree, expected graduation date, cost per term, estimated annual cost, and estimated total program cost.

6. To finalize an approved program agreement, the employee and his/her Department Head must sign the Career Development Plan approving the participation in the program and understanding of the department’s responsibilities.

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7. Employees approved to participate and receive support must make progress toward the completion of the goals stated in the Career Development Plan and remain in good standing with all the requirements. Employees must promptly notify ESP staff of any changes that deviate from the approved Career Development Plan.

REIMBURSEABLE COSTS

1. Courses:
    - Undergraduate and graduate level coursework is eligible for reimbursement only if courses are pre-approved and required to obtain a degree, license, certificate, or other qualification approved through the Educational Support Program.
    - Courses must be satisfactory completed. A minimum grade of "C" for undergraduate and a minimum grade of "B" for graduate level work is required for reimbursement. (A "B-" in a graduate degree program may be reimbursed on a case-by-case basis contingent upon a review of student cumulative GPA and degree completion progress.)
    - Courses must be offered by a regionally accredited educational institution that has been approved by the Human Resources Director or their designee, unless exceptions are made for specific vocational training.
    - Repeated courses may be eligible if approved by the Human Resources Director or their designee as part of an overall career development plan.

2. Tuition:
    - Participating Departments may provide employees up to $5,250 per calendar year in tax-free educational assistance per Internal Revenue Code (IRC) Section 127. Educational assistance exceeding that amount will be reported as taxable income.
    - When approved by the Department, all lower division courses that are required for the degree and available at a community college will be reimbursed at the annual California Community Colleges tuition rate, whether the course is taken at a community college or at a university.

3. Textbooks and Fees:
    - Required textbook and laboratory fees will be reimbursed at cost with appropriate documentation. Documentation includes receipts showing payment and course syllabi documenting that the textbooks and/or fees are a course requirement.

NON-REIMBURSEABLE COSTS

1. Those costs and courses which are not required by an approved Career Development Plan.
2. Those courses which duplicate training the employee has already received.
3. Those courses not offered through an approved, regionally accredited educational institution.
4. Courses which the employee dropped or did not satisfactorily complete.
5. Non-resident tuition fees.
6. Parking fees, meals, transportation cost, mileage reimbursement, exam fees, professional fees, other incidental fees, and other costs not specifically covered in this program
7. Courses are generally taken on the employee's own time, on compensatory time, vacation time, or annual leave approved in advance by the department/agency head. Department heads are encouraged to adjust schedules whenever possible to allow employees to attend classes during regular work hours when necessary, including flextime hours. The 20/20 program and certain fast-track programs are exceptions to this general rule.
8. Costs for which reimbursement is received from other sources are not reimbursable from the County. This would include Pell Grants, Cal Grants, Board of Governor's Waiver (BOGW), scholarships, or any other financial assistance.
9. This reimbursement program does not cover conventions, seminars, workshops and conferences, or any program not qualifying as part of a career development plan.

REIMBURSEMENT REQUESTS GUIDELINES

- Request for Reimbursement, including all required documentation, must be received by the ESP staff within thirty (30) days from completion of the term.
- Courses that have not been pre-approved will not be paid.

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- Participants must have provided documentation verifying acceptance from the school to ESP staff prior to receiving any funds.
- To receive reimbursement, the following documents are required
    - Completed Tuition Request form, official record of grades, a paid tuition bill or statement, a copy of the course syllabus for each course, original receipts for textbooks or any other reimbursable costs.
- For costs to be covered, the participant must have attained a passing grade of "C" or better in all undergraduate coursework and a "B" or better in all graduate level or higher coursework.
- Failure to provide ESP staff with the documentation required in this section will result in a delay in processing requests.
- Participants who receive or utilize funds in a manner other than described in these procedures will be dropped from the program and any funds received must be repaid according to Board of Supervisors Policy C-7, Section 11.

PROGRAM ADMINISTRATION AND REPORTING GUIDELINES

1. The Human Resources Director or their designee will implement and administer this program and will have the authority to administratively interpret its provisions. Approval of the Human Resources Department and preparation of an approved Career Development Plan are required conditions for reimbursement. The Human Resources Director may develop such forms and additional procedures which are deemed necessary to accomplish the intent of this Educational Support Program. Any or all sections of this program may be amended or discontinued at any time.

2. Employee Responsibilities:

    - Maintain contact with Career Counselor to review progress.
    - Submit acceptance letter from approved educational institute and annual financial aid acceptance or denial letter.
    - Submit required forms for reimbursement.
    - Maintain educational performance. Employees may be placed on academic and/or progress probation for one term and may be terminated from the program for not improving performance during the probation term.

- Maintain job performance. If the employee engages in sub-standard performance, then the employee may be dropped from the program.
- If the employee submits false information or fails to provide complete reimbursement documentation as requested, the employee will be dropped by the program and may be required to return all the monies expended to date.
- Any participant who does not provide required documentation in a timely manner will be put on notice and have 30 days to remedy the problem. Failure to resolve the problem while on notice will require the return of all monies expended either for the course or for the entire degree program.
- Perform post-support County service, even if dropped from the program for performance or documentation reasons, if such a service agreement is required and has been signed.

3. Department Responsibilities:
    - Identify difficult-to-recruit or retain positions within the department relevant to the ESP and communicate any changes to the ESP staff.
    - Develop criteria for Textbook and Tuition Reimbursement and Loan Repayment, in accordance with the County's qualifying Educational Reimbursement Plan under Section 127 of the Internal Revenue Code ensuring that the criteria are not "discriminatory in favor of employees who are highly compensated employees."
    - Provide input on the employees' likelihood of success prior to approval of the Career Development Plan.
    - Inform the ESP staff regarding any changes to the participant's employment, including but not limited to transfers, promotions, demotions, terminations, and performance issues.
    - Collaborate with ESP staff to develop educational and internship programs to meet County workforce needs.

4. Human Resources Department Responsibilities:
    - Listen to input from department representatives regarding an ESP applicant prior to approving a Career Development Plan.

- Collaborate with department management to develop educational and internship programs to meet the department's workforce needs.
- Discuss progress of Career Development Plan with each ESP participant.
- Report to the Board of Supervisors regularly regarding the status of the program
- Monitor taxation and maximum funding issues.

5. Program Reporting and Funding:
    - A monthly report will be prepared for the HR Director. This report will include participant information, program statistics, and funding status.
    - Funding will generally be department paid. Departments are expected to budget for the remaining years of their employees' education, which is outlined in an approved career development plan.
    - Educational Loan Repayment will only be department paid and will not be supplemented by the Educational Support Program budget.