County of Monterey
Board Policy Manual

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Educational Assistance and Career Development Program	P-127	1 of 4
Policy Category Personnel		

I. Purpose

The purpose of this policy is to support the provision of superior services to residents of the County of Monterey by encouraging professional development through education and training opportunities for county employees to excel in their work.

II. Background

The Educational Assistance and Career Development Program (Program) is designed to encourage county employees to participate in a degree program offered by an accredited college or university or specialized training and licensure for career-related advancement or promotional opportunities within the County. The Program is intended to help recruit and retain county employees by supporting the furtherance of their education to enhance their careers and service delivery.

III. Policy

It is the policy of the County to support county employees with the improvement of their job-related skills and expertise through the partial reimbursement of eligible educational costs. These reimbursements are subject to the pre-review and pre-approval of the Department Head or designee for county employees acquiring work-related education, degrees, licensing, or certifications necessary to enhance their career-related knowledge, skills and abilities, work performance and to prepare for county career advancement opportunities.

The Program is subject to an analysis of:

1) whether the Department Head approves the county employee's request;
2) whether the educational program being pursued promotes the employee's work in the County services and goals; and,

3) whether the requesting Department's adopted budget (without a request for augmentation to the approved budget) can absorb the costs associated with the educational expense reimbursement to the employee.

The Program is available to all departments based on their approved funding levels and participation in the program will not be capriciously denied. Based upon anticipated participation and available funds, if a Department seeks to provide educational reimbursements, the Department is responsible to establish an appropriate budget allocation annually as part of the County's budget process. Augmentation requests will not be considered for the purpose of this policy.

The Program is not an employee benefit, right or entitlement, and is not subject to any grievance process.

IV. Procedure

EMPLOYEE ELIGIBILITY

To be eligible, employees must:

- Have active, permanent County of Monterey full-time or part-time status;
- Have completed and passed the initial County probationary period in accordance with the applicable Memorandum of Understanding (MOU) or Personnel Policies and Practices Resolution (PPPR); and,
- Received a satisfactory performance review in their position within the preceding twelve (12) months.
- Remain employed for two (2) years with the County of Monterey following the reimbursement in order to be eligible for full reimbursement.

Eligibility for educational reimbursement is subject to the Department Head's budget and availability of funds and NOT guaranteed for any county employee who submits an application for educational assistance.

The County will NOT reimburse tuition costs to county employees who separate from employment prior to reimbursement having been issued.

Eligible county employees who transfer departments during an active approved request are required to resubmit a request for approval from their new (receiving) Department Head.

SERVICE REQUIREMENTS:

Under this policy, in consideration of receiving educational reimbursement assistance, the employee is to agree to commit to two (2) years of continued service with the County of Monterey following the completion of each course. Should the employee voluntarily resign prior

to the two (2) years, upon resigning for any reason of receiving reimbursement for an approved course, the employee must return the monies to the County, using the scale below:

1) If an employee resigns within 0-12 months after receiving reimbursement, they must repay monies at 100%.
2) If an employee resigns after 12 months but prior to 24 months after receiving reimbursement, they must repay monies at 50%.

As a result of an employee having an obligation to return reimbursed monies to the County for tuition reimbursement due to their resignation, the employee's remaining paychecks may be subject to deductions pursuant to the County agreement. Employees separated from employment due to a reduction in force or reorganization shall not be required to reimburse the monies.

QUALIFIED EDUCATIONAL PROGRAMS

- Associate, baccalaureate, graduate, and doctoral degree programs issued by an accredited college or university.
- Specialized training, licensure, or certification programs.
- Online/Virtual accredited courses

Educational programs must be related to the County's services and employment.

APPLICATION PROCEDURES:

1. Employee completes an electronic application "Educational Assistance and Career Development Program Application Form" four (4) weeks prior to the first course session, specialized training, licensure, or certification program with one (1) copy of the following:

    - **Coursework** (college/university, correspondence, or online): course description from issuing institution's official course catalog. Note: employee must include a description(s) for each course taken for which reimbursement is requested; OR

    - **Specialized training, licensure, or certification programs**: applicable description or brochure materials.

2. Departmental Human Resources Analysts are responsible for reviewing each application to determine and confirm the following:

    - Coursework and specialized training are directly related to employee's work; or lead to a job-related degree, specialized training, licensure or certification aligned with a position or program within the County.
    - Request meets the qualified educational program criterion above.
    - Coursework, specialized training, licensure, or certification programs must be obtained from an approved program or accredited college/university.
    - Employee meeting program eligibility:

- County of Monterey employee is a permanent full-time or part-time, and in an active status;
- Employee has completed their initial County of Monterey probationary period; and,
- Employee has received a satisfactory performance review within the preceding twelve (12) months.

3. Departmental Finance Manager or equivalent reviews request and confirms approved budget funding is available for reimbursement.

4. Department Head or designee reviews completed packet and approves/denies employee's request.

REIMBURSEMENT PROCEDURE

Employee:

Within four (4) weeks of completion of coursework, specialized training, licensure or certification program, employee submits and uploads the following:

1) Copy of official grade report showing a final grade of "C" or better or certificate of passing.

2) Copies of all official receipts associated with coursework (e.g., registration, tuition, textbooks, lab, etc.) for which reimbursement is being sought. Reimbursement of claims shall be based upon submission of appropriate official receipts.

3) Completion of declaration under penalty of perjury that the expenses claimed for reimbursement are not being submitted for reimbursement by any other program or entity.

Department:

Upon receipt of reimbursement request, the Departmental Human Resources Analyst verifies that:

1) Course was completed with a grade of "C" or better for undergraduate, graduate or doctoral course(s); a grade of "Pass" for coursework, specialized training, licensure, or certification programs conducted on a Pass/Fail basis. AND

2) All receipts for expenses are appropriate and not subject to reimbursement by any other program or entity.

Thereafter, the Departmental Human Resources Analyst submits the reimbursement request for final approval to the Department Head (or designee) and forwards the approved claim to the Auditor Controller's Office for processing of reimbursement.

In accordance with Section 127 of Internal Revenue Code – Educational Assistance Programs:

- Eligible employees qualify for reimbursement of tuition expenses, fees, and the costs of textbooks in an amount up to that designated by the Internal Revenue Code.
- Eligible employees must pursue higher education or specialized certification which prepares the employee to seek promotional opportunities within the County.
- Eligible employees receiving financial assistance including Title IV-E scholarships or other types of scholarships, fellowships, grants, and/or Veteran's benefits, may be eligible for reimbursement only after all other financial assistance has been applied to the tuition expenses and other school-related costs.
- Educational Assistance and Career Development reimbursements may be treated as income according to the applicable taxation rules and withholding deductions.
- Educational Assistance and Career Development is available only to County employees in good standing and does not apply to spouses, dependents, or registered domestic partners.
- Educational Assistance and Career Development is on a first come, first served basis.

REIMBURSEMENT SCHEDULE

Every effort shall be made to ensure that reimbursement payment is made as soon as administratively practicable following the County of Monterey payroll schedule.

Reimbursements will only be processed in the regular payroll schedule; therefore, no separate reimbursement checks will be issued.

ESTABLISHMENT AND IMPLEMENTATION OF PROCEDURE

The Director of the Human Resources Department or designee is authorized to establish and modify, as needed, further procedures to implement this policy.

V. Review Date

a. This Policy will be reviewed for continuance by July 25, 2028

VI. Board Action

a. *Lesgistar File No. RES 23-620, July 25, 2023*