

## POLICIES & PROCEDURES for SEIU

### INTRODUCTION

The Amended Agreement and Declaration of Trust re-establishing the Local SEIU 721 Training Fund Trust was made effective January 2009 in order to enhance the personal and professional development of SEIU members employed with the County of Riverside. In order to meet the goals of this agreement, the SEIU/ESP subcommittee was developed consisting of representative from both the County of Riverside and SEIU. The County has centralized the various educational initiatives for its employees into one Educational Support Program thus allowing a unified approach to meet workforce needs. The Riverside County SEIU Training Fund Trust will be administered through the Educational Support Program and the SEIU/ESP Subcommittee.

### PURPOSE

To encourage and facilitate career development through a program whereby members of SEIU may be:

- A. Reimbursed for the costs of textbooks, tuition, registration, and laboratory fees for job related degree or certification programs outlined in an approved Career Development Plan.

### PROGRAM OVERVIEW

Pursuant to the Amended Agreement and Declaration of Trust effective January 8, 2009 the SEIU Local 721 Training Fund has been allotted to be utilized for job related degree or certification educational assistance through ESP's Textbook and Tuition Reimbursement Program. Employees will apply to the program and follow the procedures outlined below in order to receive funding.

### ELIGIBILITY

This program is open to the following:

1. Regular full-time County of Riverside employees and members of the Service Employees International Union Local 721 who have successfully completed their initial County probationary period and are currently in good standing with no documented performance or behavioral issues.

### APPLICATION PROCEDURES

1. Interested employees will complete and return the Educational Support Program Application to the Human Resources Department (HR), ESP staff, with proper signature authorizing initial participation.

# EDUCATIONAL SUPPORT PROGRAM - SEIU POLICIES & PROCEDURES

2. Applications will be reviewed and categorized by ESP staff. The following criteria will be utilized to determine priority:
  - Date received in Human Resources
  - Funding availability
  - Other priorities as determined
3. Based on the above priorities, ESP staff will contact the employee to schedule an appointment with the ESP's Career Counselor, which can be conducted in person or via phone, and provided with a documentation checklist.
4. Employees will complete an online career assessment.
5. At the meeting the Counselor and Employee will:
  - Review the information provided on the documentation checklist.
  - 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.
6. The Career Counselor will develop a Career Development Plan which will outline the approved courses, degree program, educational institution, accreditation, number of units, expected graduation date, cost per term or credit hour, estimated fiscal year cost, and estimated total program cost.
7. In order to finalize the Career Development Plan it will be sent to the SEIU Sub Committee for approval. Upon approval the employee will receive the Career Development Plan for review and signature and return to the Educational Support Program Career Counselor.

## REIMBURSEABLE COSTS

1. Courses:
  - Undergraduate and graduate degree coursework is eligible for reimbursement only if courses are pre-approved on a Career Development Plan developed by the Educational Support Program.
  - Job related certification programs are eligible for reimbursement only if courses are pre-approved on a Career Development Plan developed by the Educational Support Program.
  - Courses must be satisfactorily completed. A minimum grade of "C" for undergraduate and a minimum grade of "B" for graduate level work is required for reimbursement.
  - Courses must be offered by an accredited educational institution that has been approved by the Human Resources Director or his designee.
2. Tuition, Required Textbooks, and Fees:

# EDUCATIONAL SUPPORT PROGRAM - SEIU POLICIES & PROCEDURES

Reimbursement may be available for tuition, required textbooks, registration fees, and laboratory fees for job-related degree required courses, in accordance with the provisions of this program.

A maximum of:

- \$4,000 per person per fiscal year for a maximum of two years for a full time student (12 semester units/16 quarter units for undergraduate programs and two classes per quarter for graduate programs is full time unless official documentation is provided by the educational institution stating otherwise).
- \$2,000 per person per fiscal year for a maximum of four years for a part time student.

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. *(The cost per unit at California Community Colleges for the 2008-2009 academic year is \$20.00, not including required textbooks.)*

## NON-REIMBURSEABLE COSTS

1. Those costs and courses which are not on an approved Career Development Plan.
2. Those courses which duplicate training the employee has already received.
3. Those courses not offered through an approved accredited educational institution.
4. Those courses required for a J.D. or Ph.D. program.
5. Courses which the employee dropped or did not satisfactorily complete.
6. Non-resident tuition fees.
7. Parking fees, meals, transportation cost, mileage reimbursement, exam fees, professional fees, other incidental fees, and other costs not specifically covered in this program.
8. 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.
9. 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.
10. This reimbursement program does not cover conventions, seminars, workshops and conferences, or any program not qualifying as part of a Career Development Plan.

# EDUCATIONAL SUPPORT PROGRAM - SEIU POLICIES & PROCEDURES

## REIMBURSEMENT REQUEST GUIDELINES

Once an approved Career Development Plan is received by ESP staff, the employee will receive a confirmation and a Request for Reimbursement form.

- 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.
- Participants must have provided documentation verifying acceptance from the school and an annual denial or acceptance letter regarding financial aid (FAFSA) on file with ESP staff prior to receiving any funds.
- In order to receive reimbursement, the following documents are required:
  - Completed Tuition Reimbursement Form, official record of grades, a copy of a paid tuition bill or statement, a copy of the course syllabus for each course (showing required textbooks and course description), original receipts for textbooks or any other reimbursable costs.
- In order 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.

## EMPLOYEE RESPONSIBILITIES

- Submit required documentation for plan development.
- Submit request and required forms for reimbursement to the Educational Support Program within 30 days from completion of term.
- 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.
- Upon successful completion of the approved job related certification or degree program employees are required to submit proof of completion to the Educational Support Program within 60 days.
- 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, the employee will be dropped from the program and may be required to return all monies expended to date.
- Upon successful completion of the program, the employee may be requested to mentor and/or participate in an informational interview/job shadow with a County employee or student interested in pursuing their profession.