

POLICY TITLE: EDUCATION ASSISTANCE
POLICY NUMBER: 3620

COMMITTEE APPROVAL DATE: 09/05/2018
BOARD APPROVAL DATE: 09/26/2018

WRITTEN/REVISED BY: HUMAN RESOURCES
SUPERSEDES: 01/30/2013

POLICY:

3620 It is the policy of the Beach Cities Health District (“District”) to encourage employees to pursue education opportunities that are related to their present work and will prepare them for foreseeable opportunities within the District.

3620.1 SCOPE

This policy applies to all regularly scheduled full-time employees and part-time employees who are regularly scheduled for 30 or more hours per week. Employees must have completed 12 months of continuous employment with the District before applying for education assistance and be in good performance standing.

RESPONSIBILITY:

3620.2 It is the responsibility of management to understand, communicate and enforce this policy uniformly among District employees. It is the responsibility of employees to understand the policies, guidelines, and procedures, and to follow them accordingly.

3620.3 ELIGIBILITY

3620.3.1 To be eligible for reimbursement of course costs, the employee must receive advance approval for the class(es) from his/her Department Director or Chief Executive Officer. Requests for reimbursement are to be submitted on the Education Assistance Request Form. The Department Director or Chief Executive Officer will review and approve the request. The employee will be notified of final approval, or the reasons for disapproval.

3620.3.2 Education assistance is incorporated into the annual budgeting process and must be an approved budgeted item. If the request for education assistance is not an approved budget line item, the Chief Executive Officer must approve the request. Even though the dollar amount for education assistance is approved in the budget, the employee may lose eligibility for reimbursement if he/she does not remain in good performance standing.

3620.3.3 As a condition for receiving education assistance, employees agree to remain employed by the District for a minimum of 12 months after receiving reimbursement. Employees who leave the District within 12 months of receiving education assistance will be required to reimburse the District on a pro-rated basis. The District will calculate the amount of reimbursement due based upon a 12-month look-back period.

3620.3.4 If an employee requests and is approved for education assistance, he/she must use it

within the fiscal year approved. If education assistance is not used for reasons other than those approved by the Department Director (e.g., heavier workload, extenuating personal circumstance), the employee may not be eligible for approval of future education assistance requests.

3620.4 CLASS QUALIFICATION

3620.4.1 Three types of classes qualify for reimbursement per this policy, provided that they are related to the employee's present work assignment, or may prepare him or her for future career opportunities within the District:

3620.4.1.1 Classes that are taken as part of the requirement for a degree or certificate.

3620.4.1.2 Classes that may be taken individually and need not be directed toward a degree or certificate.

3620.4.1.3 Correspondence courses and home study programs offered through accredited institutions.

3620.5 REIMBURSEMENT

3620.5.1 The total amount of reimbursement that will be paid to an employee is limited to \$4,000 in any fiscal year. An employee must be actively employed at the time a request for reimbursement is submitted. The District will reimburse eligible employees for approved courses of study based on the following criteria:

3620.5.1.1 A refund of the entire cost of registration fees (or tuition) and required class materials (up to the maximum limit) will be made if the employee received a grade of B or better for the class.

3620.5.1.2 A refund of one-half (1/2) of the cost of registration fees and required class materials will be made if the employee received a grade of C for the class.

3620.5.1.3 No refund will be made to employees who receive a grade below C for the class.

3620.5.1.4 Reimbursement will be pro-rated accordingly for employees who are regularly scheduled for less than 40 hours. As an example, an employee regularly scheduled for 30 hours per week who receives a grade A will be reimbursed at 75%.

3620.5.2 Upon completion of the class(es), the employee is responsible for sending copies of the grade slip(s), expense tracking form and expense receipt(s) to the Department Director for approval and submission to the Finance Department for reimbursement.

3620.6 The District will comply with and enforce all federal and state regulations concerning tax treatment of employer reimbursed tuition assistance programs.



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3620.7 EXCEPTIONS

The Chief Executive Officer must review and approve exceptions to this policy.