

**SANTA CRUZ COUNTY
PERSONNEL ADMINISTRATIVE MANUAL**

Topic: TUITION REIMBURSEMENT	Date Issued: Nov. 15, 1990
Section: TRAINING AND STAFF DEVELOPMENT	Date Revised: Dec. 13, 1999; Feb. 3, 2003; Nov. 10, 2016; Jan. 24, 2025
Number: VIII.6.	

**REIMBURSEMENT FOR TUITION AND NON-REQUIRED
LICENSES/CERTIFICATES GENERAL REPRESENTATION UNIT**

Pursuant to the Memorandum of Understanding (MOU) for the General Representation Unit, monies may be set aside for reimbursement to employees in the General Representation Unit for tuition costs and/or costs of non-required licenses/certificates; and for reimbursement for dues for professional associations that are inseparable from certification and/or licensure. A specific amount as indicated in the General Rep MOU has been set aside for tuition reimbursement and for the reimbursement of non-required licenses/certificates. Monies are available on a first-come, first-served basis, in accordance with the criteria and procedures below.

A. ELIGIBILITY OF EMPLOYEES

Only employees occupying budgeted positions in the General Representation Unit are eligible for reimbursement under these provisions. Extra-help employees are excluded from eligibility, except that extra help employees in the classes of Lifeguard, Head Lifeguard, Aquatic Aide, Recreation Program Specialist, Recreation Coordinator, Recreation Supervisor, Park Services Officer, and Park Recreation Cultural Worker 1-IV are eligible to request reimbursement for licenses and certificates pursuant to Article 25.1 C.2.

**B. ELIGIBILITY OF COURSES, NON-REQUIRED LICENSES AND CERTIFICATES,
AND PROFESSIONAL ASSOCIATION DUES**

The following criteria shall be used for approval of courses and non-required licenses/certificates:

"Non-required licenses/certificates" are those licenses/certificates issued by a Federal or State agency which are not required by Federal, State, or County laws, or a requirement stated in the County of Santa Cruz job specification for the employee's job classification.

1. Courses/licenses/certificates must be of direct value to the County and relevant to the employee's field of work or promotional opportunities that are approved in concept by the Department Head and the Training Task Force (TTF) and approved by the Personnel Department.

2. Courses/licenses/certificates will be limited to those providing knowledge and skills that cannot be acquired through available in-service training.
3. Courses/licenses/certificates must cover subject matter not sufficiently encompassed in the employee's previous education and experience.
4. Licenses/certificates must be obtained and courses must be attended outside of the employee's scheduled work hours.
5. Courses must be taken for college credit or meet other criteria approved by the Training Task Force.
6. Professional Association Dues are for professional associations for which dues are inseparable from certification and/or licensure and are not reimbursed under any other MOU provision.

C. REIMBURSEMENT PROVISIONS

1. The maximum reimbursement which may be received by each employee for tuition reimbursement and or non-required licenses/certificates and Professional Association dues is \$400 per calendar year. The maximum amount was determined by taking into account the total monies available, the anticipated number of employees who may take advantage of the program, and other factors. Funds available for reimbursement are limited to the amount budgeted in the Personnel Department for this specific program.
2. Costs incurred for books, supplies, parking, mileage, meals and other incidental costs are not reimbursable. Only course enrollment fees and fees for license/certificates are eligible for reimbursement.
3. No reimbursement will be provided under this program for courses/licenses/certificates that are eligible for reimbursement under other provisions of the General Representation Unit Memorandum of Understanding (i.e. Article 15.3-Reimbursement for Licenses or Certificates).
4. COURSES. Reimbursement for courses shall be made to the employee upon completion of the course with a minimum final grade of "C" or its equivalent for an undergraduate course, or "B" or its equivalent for a graduate course, or a "Pass" if the course is offered only on a Pass/Fail or No-Credit basis.

LICENSES/CERTIFICATES. Requests for reimbursement for licenses/certificates must be accompanied by a copy of the license identifying the licensing agency, the date the license was issued, the date of payment for the license/certificate, and a written explanation describing the direct value to the County and the relevancy to the employee's field of work or promotional opportunity.

PROFESSIONAL ASSOCIATION DUES. Requests for reimbursement for professional

association dues must be accompanied by a copy of the association's dues application form, a paid receipt indicating the date the dues were paid by the employee, and a written explanation describing the direct value to the County or the relevance to the employee's field of work.

D. REQUEST PROCEDURE

Requests for reimbursements must be submitted to the Personnel Department on form PER1360 (see below). Final approval will be made by the Personnel Department under general policies established by the TTF.

E. TAX IMPLICATIONS FOR EMPLOYEES

Reimbursement under this program may be subject to Federal and/or State taxes. Please contact your tax advisor for assistance.

F. APPLICATION PROCEDURES

Once an employee determines their course, non-required license/certificate, or professional association dues meet the eligibility requirements for reimbursement, they must complete the following steps:

1. Fill out an employee Tuition Reimbursement Request Form PER1360.
2. Attach a course outline (college catalogue descriptions are acceptable). Verify that the license/certificate, course, or dues for which reimbursement is sought are not a requirement for the position. For reimbursement of a non-required license/certificate fee, an employee must write an explanation to the training Task Force Committee describing the direct value to the County or the relevancy to the employee's field of work or promotional opportunity that the license/certificate possess, together with:
 - a copy of the license identifying the licensing agency, the date the license was issued, the date of payment for the license/certificate
 - proof of payment
3. Submit application to Personnel Department.
4. Applications will be accepted in advance of courses and for courses taken within the last three months of the request. Applications will be reviewed each January, April, July, and October.
5. Applications for reimbursements are NOT GUARANTEED to be accepted.

Notification of Acceptance: The request will be reviewed by the Personnel Department and the Training Task Force for compliance with Tuition Reimbursement Program provisions. Considerations will also be made for employees who demonstrate that they have done their due diligence to reasonably comply with the requirements of the Tuition Reimbursement Program provisions and the Memorandum of Understanding. Notice of approval or rejection will be forwarded to the employee in writing.

G. REIMBURSEMENT

a. The employee is required to submit the following to the Personnel Department after completing an approved course, obtaining a license/ certificate, or paying professional dues not reimbursed under any other MOU provision or by their department.

1. A claim form signed by the employee and supervisor (AUD7B).
NOTE: The department head is not required to sign the AUD7B.
2. A dated grade certificate
NOTE: A minimum final grade of "C" is required for undergraduate courses; a final grade of "B" is required for graduate courses or a "pass" is required for courses offered only on a pass/fail or no-credit basis.
3. Proof of payment of tuition, fee, or dues.

EMPLOYEE TUITION REIMBURSEMENT REQUEST FORM

COUNTY OF SANTA CRUZ

To be eligible for the Santa Cruz County Employee Tuition Reimbursement Program, you must;

1. comply with the requirements and procedures set forth in Personnel Administrative Manual Section VIII.6.;
and
2. complete this form in full; and
3. send this form and a copy of the course description, license/certificate information, or professional dues information to the Personnel Department.

Once you have been accepted for the Tuition Reimbursement Program, you will receive a completed copy of this form. Following your completion of the course or upon obtaining the non-required license/certificate, please submit an AUD-7B form to the Personnel Department with a dated grade certificate of completion of the course in question and proof of tuition or license/certificate fee payment. If the grade meets rule requirements for courses, your claim will be processed.

Date: _____

Name: _____ Employee Number: _____

Department: _____ Work Phone: _____

Job Title: _____

Course Title: _____

School: _____

License/Tuition Cost: _____

How will this course help you in your work as a County Employee? For licenses/certificates/dues, explain its relevance/value. For Professional Dues, explain its relationship to certification/licensure.

REMINDER:

For courses, you must attach a copy of the course description from the college catalogue.
For licenses, you must attach a copy of the license/certificate and proof of payment.

I hereby certify that this course/license/certificate or these professional dues are not required for my position, not reimbursed by my department in any other way, and that I am not eligible for reimbursement from the County for course/license/certificate/dues under any other MOU provision. If I am reimbursed through this program and reimbursed for the same course/license/certificate/dues through my department, I will repay the full amount to the Tuition Reimbursement fund _____ (please initial).

I hereby certify that the above information is correct, that I will comply with the requirements for this program.

Signature: _____ Date: _____

Approved by Training Task Force Date