



BEAR VALLEY COMMUNITY SERVICES DISTRICT

EMPLOYEE DEVELOPMENT, TRAINING, AND REIMBURSEMENT POLICY

A. Objective.

Bear Valley Community Services District recognizes the importance of training and developing our staff and understands that our employees are the key to our success. The District, therefore, encourages all employees to be continually improving their skills and abilities both through on-the-job and off-the-job training.

The District further believes that training and development of staff provides benefits both to its employees in terms of their overall career and prospects for advancement as well as being central to the fulfillment of the District's mission.

In support of these goals, the District has adopted this policy which applies to all full-time District employees. This policy covers costs associated with:

- Professional exams and exam preparation courses.
- Certificate programs and credentials.
- Courses offered by an accredited institution, including e-learning.
- Workshops, seminars and conferences.
- Membership in professional organizations.
- Magazine subscriptions.

These guidelines are discretionary and not an entitlement or benefit of employment, and are subject to annual budgets established for education, training and memberships.

B. Memberships.

Employees may be permitted to join professional associations with membership fees paid by the District under the following circumstances:

1. The association must have a direct relationship to the job the employee performs.
2. The employee must demonstrate the benefits to be gained as a result of such membership.
3. The request must be presented to the employee's supervisor for prior approval.
4. Requests for additional memberships may be permitted, subject to the General Manager's approval.

C. Training.

Employees may be permitted to attend off-site seminars, trainings, conferences or workshops that will be paid for by the District under the following circumstances:

1. The event to be attended must have a direct relationship to the job the employee performs.
2. For work scheduling purposes, the employee's request for attendance must be received well in advance, but, in general, at least one month prior to the event.
3. Supervisor approval is dependent on factors such as budget, the ability of the department to function in the employee's absence, and the relevance of the activity to either the employee's current position or their professional development plan. In all cases, participation in development activities should not interfere with the effective performance of job responsibilities.
4. If an employee participates in job-related training and professional development activities during a scheduled work day, it will be considered work time. Professional development and training activities outside of and in addition to regular work hours for non-exempt employees require approval in advance from their supervisor because the activities are considered regular work hours for overtime compensation purposes.
5. Requests for attendance at multiple training and professional development activities or events in any calendar year may be permitted, subject to the General Manager's approval.

D. Examinations & Certifications.

The District will cover initial expenses for employees to obtain and maintain licenses, certifications, and examinations to obtain such credentials under the following circumstances:

1. The employee and the employee's supervisor have agreed upon this course of advancement as part of the annual evaluation, or other periodic review process.
2. The certification is directly relevant to the employee's current job responsibilities or planned career progression.
3. The District will not pay for an employee to retake a course or take a second exam if the employee fails to receive a passing score the first time. The District may, at its discretion, reimburse expenses for a subsequent, successful attempt.

E. Tuition Reimbursement.

Upon proof of successful completion, the District will reimburse employees for one-half the cost of tuition and required textbooks under the following circumstances:

1. The course of study is approved in advance by the General Manager.
2. The course of study is directly relevant to the employee's current job responsibilities or planned career progression, and is undertaken at an accredited institution.
3. Final course grade of C or better (or B or better for post-graduate programs) will constitute successful completion.

F. Travel Expenses.

1. Lodging: Employees required to travel for approved job-related training and professional development activities are expected to select reasonably priced lodging accommodations and

will be requested to justify charges that appear to be excessive. All claims for lodging reimbursement must be supported by original receipts that show:

- The name of the hotel
- The number of occupants
- The goods or services for which each individual charge is made (room rental, food, tax, etc.)

Lodging expenses may be directly billed to the District, paid directly by the District or reimbursed to the employee according to the specific needs and capabilities of the providers. Employees must receive prior approval from their supervisor prior to booking. Employees are expected to book lodging that is reasonable and relevant for the specific destination, time of year and business purpose. Further justification may be required for expenses that appear to be excessive. State or government rates should be utilized when available.

2. Meals: Meals will be reimbursed according to the current rates established by U.S. General Services Administration for California.
 - Itemized receipts must be submitted and only actual expenses will be reimbursed.
 - The District will not reimburse for the purchase of alcohol.
 - Tips are included in the cost of each meal.
3. Mileage: The District will reimburse employees for business use of personal vehicles at the then current IRS standard mileage rate.
4. Per Diem: In lieu of actual expense reimbursement, a per diem allowance for meals, lodging and/or incidental expenses may be provided with advance approval from the General Manager.

G. Procedure.

1. The employee must submit a professional development request form and forward it to his or her supervisor. If approved, the supervisor will send the form to the Department Head and human resources (HR).
2. The employee may incur expenses only after receiving approval from the Department Head. The employee must then submit the following documents for reimbursement:
 - Completed Expense Report and Claim for Reimbursement form
 - Itemized Receipts.
 - Copy of the approved professional development request form.
 - Certificate of completion or similar document and a professional development report (when applicable) to HR to be filed in the employee's personnel file.

BEAR VALLEY COMMUNITY SERVICES DISTRICT

**EMPLOYEE DEVELOPMENT, TRAINING & REIMBURSEMENT POLICY
ACKNOWLEDGEMENT OF RECEIPT**

Employee Acknowledgement

By signing below, Employee represents that he or she has read, understands and agrees to the District's Employee Development, Training & Reimbursement Policy.

Signature

Date

Print Name