



Santa Barbara Countywide Policy Manual

Subject/Title: Employee Development Reimbursement Program Policy	Number:
Responsible Departments: County Human Resources	Dept. Reference:
Approved by: Board of Supervisors	
Original Policy: 2/28/2023 Revisions:	
Meet and Confer Obligations: All employee organizations	
Scope of Application: This policy applies to all County departments and employees where explicitly provided for in a memorandum of understanding or applicable resolution.	

PURPOSE

The Employee Development Reimbursement Program is intended to:

1. Encourage eligible employees to continue their education and training in order to meet present and future needs for County services;
2. Increase effective work performance and employee efficiency;
3. Improve retention and facilitate promotion from within the County; and
4. Attract to County service, persons of superior ability and potential for advancement.

DEFINITIONS

Eligible Employees:

1. All permanent regular County employees are eligible. Employees who are initial probationers, extra-help employees, or contractors are not eligible to receive reimbursement under the terms of this policy.
2. Employees who receive reimbursement from other sources (State funding, G.I. Bill, scholarships, etc.) are not eligible for reimbursement from the County program except for expenses not covered by those sources. Employees must indicate which portions are not covered by sources such as those listed above.
3. Permanent part-time employees are eligible for a pro-rated reimbursement based on their part-time percentage.

Eligible Courses:

1. For the purposes of this policy, “eligible course” refers to any employee development activity including training courses. Documentation of such must be submitted along with the request to be reimbursed for them. For the purposes of this policy, “tuition” refers to any fees required for completion of the course, and “textbook” includes any materials that are necessary for completion of the course.
2. Courses eligible for reimbursement include both those necessary to complete formal certificate or degree programs or those that relate to the employees’ current job and/or positions they may seek in the future.
3. In-person courses must be taken within the State of California. Employees can attend online programs of their choice; however, if the online program requires on-site sessions, the employee will be responsible for travel, lodging, and all other expenses outside of what is listed as a reimbursable expense under this policy.
4. The courses must be offered by a qualified academic institution or professional training organization. Typically, qualified academic institutions are those accredited by national or regional accrediting agencies for college level or graduate coursework. “Accredited coursework” for purposes of this policy is usually transferable to other academic institutions.
5. Expenses incurred for professional skills building workshops, institutes, seminars or any other training offered by professional organizations that provide knowledge and skills that enable employees to meet present and future needs for County services are eligible for reimbursement.
6. Continuing education which is necessary for retaining certification or licensure that is covered by separate provisions (e.g. in a Memorandum of Understanding) is not eligible for reimbursement

through this program.

7. Only courses with tuition and textbook charges or training fees of \$50.00 or more are eligible for reimbursement.

Reimbursable Charges: Charges eligible for reimbursement under this program include **only** those required to take a course, including tuition, required textbooks, laboratory fees, registration fees, and like charges.

1. **Advance approval is required to guarantee reimbursement** under this policy, subject to availability of funds. Eligible employees must seek advance approval to **ensure** that a course is eligible, and that funds will be available for reimbursement. Requests for advance approval must be submitted on the designated online registration form to the Organizational & Talent Development Division of the County Human Resources Department at least fourteen (14) calendar days prior to the beginning of the course. Employees who do not receive advance approval may request reimbursement, but they may not be able to receive reimbursement, subject to the availability of funds and the eligibility of the course.

OTHER PROVISIONS

Approval for courses taken during regular working hours: Employees must get approval from their departments (e.g. supervisor or manager) for courses taken on County time. Approval by the Department head or his or her designee is required if the employee has a less than satisfactory current performance rating. Generally, approval for tuition and textbook reimbursement should be limited to employees with satisfactory or better performance, unless the coursework in question could help bring employees up to that level.

For the purposes of this policy, less than satisfactory performance is defined as performance documented as such by at least two overall less than satisfactory employee performance reports not less than six months apart, one of which must be an annual evaluation. Final determination of eligibility for reimbursement resides with the Human Resources Director.

Claim for Reimbursement: To obtain reimbursement, the employee must upload documentation of completion in conjunction with the designated form, including receipts for payment of fees for tuition, eligible textbooks, and any other required fixed charges using a Smartsheet registration form after completion of the class or training to the Organizational & Talent Development Division of the County Human Resources Department.

To file a claim, submit the following [Tuition Reimbursement Request](#) with any required documentation to the Organizational & Talent Development Division.

Questions can be directed to HROTD@countyofsb.org