

RIVERSIDE TRANSIT AGENCY  
 1825 Third Street  
 Riverside, CA 92507

September 28, 2006

TO: BOARD OF DIRECTORS  
 THRU: <sup>J</sup> Larry Rubio, Chief Executive Officer  
 FROM: <sup>lm</sup> Laura Murillo, Director of Human Resources  
 SUBJECT: Authorization to Update the Employee Training & Tuition Reimbursement Policy

Summary: The Agency recognizes that tuition reimbursement is one of the most valuable benefits it can offer its employees. Employees who are given the opportunity to meet their personal educational goals can also help foster employee job satisfaction, improve productivity and contribute to the overall success of the Agency. The current Employee Training & Tuition Reimbursement Policy provides current full-time administrative employees a way to reach employee and Agency goals through advanced education.

With rising education costs, staff recommends ~~it~~ **an increase from \$3,000 to the per fiscal year tuition reimbursement amount from \$3,000 to the current of the** California State University, San Bernardino (CSUSB) Quarterly Tuition Rate for six units or more, with a maximum reimbursement of four (4) quarters per fiscal year, subject to availability of funds. Currently four (4) quarters for the 2006-2007 school year is \$4,146 for an undergraduate degree and \$4,922 for a graduate degree.

Along with the increase in tuition reimbursement, staff recommends modifying the policy's repayment schedule. A repayment schedule is outlined in the current tuition policy should an employee terminate from employment within a specified period of time following the completion of their training course. Staff recommends the following change to the current schedule:

<u>Months Time of Employment Termination Following Training Course Completion</u>	<u>% of Salary Tuition Reimbursement Repayment for Months of Commitment</u>
<b>Within First 2 months 0-6 months</b>	100%
<b>3 months 6-9 months</b>	<del>50</del> 75%
<b>4 months 9-12 months</b>	<del>25</del> 50%
<b>5 months</b>	40 %

To qualify for tuition reimbursement, employees must:

1. have one year of full-time service,
2. demonstrate the ~~training or degree~~ **course(s)** they are pursuing **is are** designed to improve their effectiveness in performing his or her duties,
3. obtain approval of ~~such training~~ prior to the commencement of the ~~training~~ **course**,
4. pay ~~training costs~~ **tuition** up-front, and
5. submit request for reimbursement once ~~training~~ **course is has** been successfully completed.

Fiscal Impact:

A review of the fiscal year 2007 educational benefit budget was conducted and it was determined that a request for additional funds is not required at this time.

Committee Recommendation:

This item was discussed at the Board Budget and Administration Committee meeting of September 13, 2006. Director Comerchero recommended that our current Employee Commitment and Tuition Reimbursement Agreement include language notifying employees of their repayment responsibility. Although the agreement does notify employees they will have to pay monies back if they leave employment before a certain period of time after completing their ~~training~~ **course**, it does not specifically refer back to the Agency tuition policy. Therefore, the Agreement has been updated as recommended.

Recommendation:

Authorize staff to update the Employee Training & Tuition Reimbursement Policy.

EMPLOYEE COMMITMENT & TUITION REIMBURSEMENT AGREEMENT

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1. Name of Employee \_\_\_\_\_  
A. Position \_\_\_\_\_  
B. Department \_\_\_\_\_

4. Course(s) \_\_\_\_\_  
Beginning Date \_\_\_\_\_  
Ending Date \_\_\_\_\_

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2. Title and Brief Description of Course(s) \_\_\_\_\_

5. Service Commitment Period \_\_\_\_\_  
Beginning Date \_\_\_\_\_  
(Course Ending Date)  
Ending Date \_\_\_\_\_

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3. Name & Location of Educational Institution \_\_\_\_\_

6. Tuition/Registration Fees \_\_\_\_\_

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7. EMPLOYEE CERTIFICATION

I agree that if my employment with the Riverside Transit Agency terminates at any time prior to the expiration of service commitment period described in Item #5, I will repay the Agency all applicable monies expended on my behalf, as described in the in the Human Resource Employee Training & Tuition Reimbursement policy, Section 6-4.

I understand that any amount which may be due the Agency as a result of any failure on my part to meet the terms of this agreement may be withheld from any monies owed me by the Agency or may be recovered by such other methods as are provided by law. My signature below indicates my concurrence with the terms as set out above.

\_\_\_\_\_  
Signature of Employee/Date

APPROVAL:

\_\_\_\_\_  
Signature of Department Head/Date

\_\_\_\_\_  
Signature of Director of Human Resources/Date

\_\_\_\_\_  
Signature of Chief Executive Officer/Date

**Riverside Transit Agency  
Human Resource Policies and Procedures**

<b>Distribution:</b> All Administrative Employees		<b>Subject:</b> EMPLOYEE TRAINING & TUITION REIMBURSEMENT	
<b>Effective Date:</b> July 1, 1989	<b>Page No.</b> 1 Of	<b>Pages</b> 4	<b>File Under Section:</b> 6 - 4
<b>Revision/Review Date:</b> September 28, 2006		<b>Approved By:</b>	

POLICY: It shall be the policy of the Riverside Transit Agency that full-time employee may be reimbursed the actual cost of tuition or registration fees upon successful completion of a training course *or courses towards a degree* designed to improve the employee's effectiveness in performing his or her assigned duties. Full-time employees with one year of service shall be eligible for tuition reimbursement for classes taken while attending an accredited college or university as a student, or work-related adult education classes. (This policy does not apply to conferences or meetings of APTA, California Transit Association, or any grant-funded meetings).

- A. Subject to the availability of funds, reimbursement for such training *course(s)* may be authorized as follows:
  - 1) By the chief executive officer
    - a) When the tuition and/or registration fee is not more than *the California State University, San Bernardino (CSUSB), Quarterly Tuition Rate for six units or more. The maximum reimbursement per fiscal year will be four (4) quarters.*
    - b) Such approval by the chief executive officer shall be obtained prior to the commencement of the training, utilizing the Employee Commitment and Tuition Reimbursement Agreement form.
    - c) All requests for training reimbursement, requiring approval by the chief executive officer, shall contain the recommendation of the department head.
  - 2) By the Board of Directors
    - a) When the tuition and/or registration fee per individual is more than *the CSUSB Quarterly Tuition Rate for six units or more for four (4) quarters*, or out-of-area travel is necessary, (out-of-area travel is defined in the RTA "Travel and

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Conference Expense Policy") except where such training is necessary to operate or maintain RTA equipment.

- b) Such approval by the Board of Directors shall be obtained prior to the commencement of training.
  - c) All requests for training reimbursement requiring approval by the Board of Directors shall contain the recommendation of the chief executive officer.
- B. Reimbursement for travel expenses associated with employee training shall be authorized in accordance with the RTA Travel and Conference Expense Policy. (Does not apply to employees attending college or university as a student.)
- C. Prior to registering for a class, the employee shall submit the Employee Commitment and Tuition Reimbursement Agreement between the employee and the Agency for required approval(s). After completion of the coursework, the employee shall submit the tuition reimbursement request for required approval(s), a copy of their course grade, and a copy of the receipt for tuition payment.
- D. If the employee terminates within ~~two~~ six months after completion of a training course for any reason except death or disability retirement, the training cost plus travel expense, meals and lodging expense will be deducted from any final payments due the employee.

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- E. If the employee terminates for any reason except death or disability retirement prior to the completion of hours in a paid status as set forth in the Employee Commitment & Tuition Reimbursement Agreement, the entire training cost will be deducted from any final payments due the employee at the time of termination, in accordance with the following proration of reimbursement schedule:

<i>Months</i>	<i>Date of Separation</i>	<i>% of Salary Reimbursement</i>
<i>Following</i>	<i>Training Completion</i>	<i>for Months of Commitment</i>
<i>Within First</i>	<i>2 - months 0-6 months</i>	100%
	<i>3 - months 6-9 months</i>	50%
	<i>4 - months 9-12 months</i>	25%
	<i>5 - months</i>	10%

- F. At the request of the chief executive officer, the Board of Directors may consider a reduction of, or a complete release from, the employee's obligation as set forth in Section D and E, if extreme hardship can be demonstrated.
- G. Training costs for seminars and conferences shall be calculated to include, but not be limited to:
- 1) Travel expense
  - 2) Meals and lodging expense
  - 3) Registration expense

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- H. The department head who signs the Employee Commitment & Tuition Reimbursement Agreement shall be responsible for insuring that the provisions and commitments of the agreement are appropriately carried out.
- I. Section F is not intended to apply to those training programs that are normally carried out by the Agency as part of the in-house training program or basic training orientation given new employees. (Example: shop supervisor training on new buses.) Technical training required of some classifications may be exempt from the provisions of Section D, but not from the provisions of Section E.
- J. Travel time to attend classes at the college or university, books and parking will not be paid.
- K. Any full-time employee attending an accredited college or university as a student can be reimbursed for tuition cost as follows:

GPA of 3.0 & above = 100% reimbursement  
GPA of 2.0 - 2.9 = 75% reimbursement  
GPA of 1.9 or less = 0 reimbursement