

# TRAINING and EDUCATION POLICY

## OFFICE *of* COURT ADMINISTRATION

### ***General***

OCA encourages the professional and personal development of its employees through the utilization of training and educational programs. Pursuant to Chapter 656 of the Government Code, appropriated funds may be used to provide training or education related to the duties or prospective duties of the employee following the training.

### ***Applicability***

The Training and Education policy does not apply to OCA Children's Court Staff. Those employees must obtain their presiding judge's approval for any training.

OCA may require employees to attend, as part of the employee's duties, a training or education program if the training or education is related to the employee's duties or prospective duties. This policy does not apply to training required by an employee's supervisor.

### ***Discretionary Training***

OCA may allow employees to attend discretionary training at the agency's expense. For purposes of this policy, discretionary training means instruction, teaching, or other education that is requested by an employee and is not normally received by other employees. It includes both out-of-agency staff development, online training courses and college degree programs when tuition or expenses are paid for or reimbursed by OCA. Credit towards a degree program is not required, however, the coursework must be applicable to the employee's job duties.

### ***Purposes of Training***

The purposes of OCA's training and educational programs include:

- Preparing for technological and legal developments
- Increasing work capabilities
- Increasing competence of OCA employees

### ***Eligibility for Participation in Discretionary Training***

All OCA headquarters employees are immediately eligible for participation in discretionary training when they begin their employment, provided they are a regular employee (i.e. not a temporary employee), and they are not on leave without pay status.

In addition, to be eligible for tuition reimbursement for a college degree program an employee must:

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- be employed by OCA for a minimum of one year before the course begins
- have demonstrated satisfactory job performance
- not be in default of previous OCA educational program obligations; and
- have satisfactorily completed all course work for which tuition reimbursement is requested.

### ***Course Work Criteria***

OCA-reimbursed training and/or educational course work must be either directly work-related or serve to enhance the employee's knowledge or performance in his or her current or prospective duty assignment, and, for college degree programs, must be provided through an accredited school.

### ***Costs Eligible for Reimbursement***

Training and education costs which may be paid directly or reimbursed to the employee include: tuition, other required fees, travel expenses, books, and other training materials. The level of assistance to be provided will be reviewed on a case-by-case basis and based on factors such as availability of funds, type of training, needs of the organization, employee development needs, etc. The employee must demonstrate successful completion of the course.

### ***Reimbursement Cap***

For enrollment in an institution of higher education or private or independent institution of higher education, the maximum amount of reimbursement an employee can receive is \$600.00 per fiscal year. This amount is prorated for part-time employees based on their percent employment.

### ***Prior Approval Required***

All requests to participate in any required or discretionary training program offered by an institution of higher education or private or independent institution of higher education must be authorized by the division director **before** the employee enrolls. Upon successful completion of the program course, the Administrative Director must authorize the tuition reimbursement.

### ***Prior Approval Procedures for all Reimbursable Training***

The employee or supervisor will submit a request to approve the training activity to the appropriate division director. A Purchase Requisition must be entered into CAPPS upon approval of training request. If travel is required, a Travel Authorization form must also be completed. If the training is discretionary training for which OCA will pay \$1,500 or more, a Discretionary Training Agreement must also be completed. In addition, for college tuition reimbursements, the Request for Tuition Reimbursement must be approved by the division director before the employee enrolls and reimbursement of the tuition must be approved by the Administrative Director prior to issuing payment.

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Once the purchase requisition is processed and assigned a purchase order number, the employee will be authorized to enroll in the approved training activity.

### ***Request for College Tuition Reimbursement***

An employee desiring reimbursement for college tuition expenses must complete a "Tuition Reimbursement Request" form. This form must be approved by the administrative director before tuition reimbursement may be processed.

The employee must attach the following documents to the Tuition Reimbursement Request form:

- Copy of the course description(s);
- Copy of the degree plan;
- Verification of successful completion (grade);
- Verification of the total rate charged by the college;
- Receipt from the college for tuition paid by the employee (if applicable).

The employee's failure to submit the required documentation within six weeks of course completion may cause OCA to deny reimbursement.

A copy of the approved/disapproved Request for Tuition Reimbursement form will be forwarded to the employee and Human Resources Division for filing in the individual's personnel file.

### ***Proof of Satisfactory Completion***

Satisfactory course completion is defined as a grade of "C" or better or Pass for a Pass/Fail type of course.

### ***Discretionary Training Agreement***

Discretionary training for which expenses paid by OCA will be \$1,500 or more requires a Discretionary Training Agreement. The Agreement is a contract signed by the administrative director and the employee, in which the employee agrees to reimburse OCA a percentage of the costs of the discretionary training, **if the employee voluntarily leaves OCA within one year of course completion.**

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The schedule is as follows;

- Voluntary separation before the four-month anniversary of the date of completion: repay 75% of the Costs.
- Voluntary separation after the four-month anniversary and before the eight-month anniversary of the date of completion: repay 50% of Costs.
- Voluntary separation after the eight-month and before the one year anniversary of the date of completion: repay 25% of costs.
- Voluntary separation after one year: No repayment obligation.

### ***Exceptions to Repayment Obligation of Voluntary Training Agreement***

The administrative director may grant exceptions to the payment of the pro rata reimbursement based upon the employee's situation. Examples of situations that may result in exceptions include: separation that is caused by circumstances beyond the employee's control such as illness or death of an immediate family member, or the unexpected relocation of a spouse. Exceptions may also be granted if separation is due to agency budgetary cutbacks, reductions in workforce, reorganizations, or for the convenience of the agency. Each situation will be considered on its own merits, and only the administrative director is authorized to grant exceptions to repayment.