ADMINISTRATIVE PROCEDURE

SUBJECT: EDUCATIONAL REIMBURSEMENT

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<td>Issued: 6/25/86</td>
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PURPOSE:

To provide assistance to employees in their personal development during off-duty time.

POLICY

The course of instruction shall be given by an accredited university, college or other public or private school acceptable to General Management which relates to the employee's present duties or which otherwise increases their potential for advancement in the District. For the purposes of this policy, an educational institution is acceptable if it is accredited through a recognized accrediting agency by the U.S. Secretary of Education.

Reimbursement will be made for tuition, registration fees, laboratory fees, required textbooks and materials in connection with the course of instruction. If books are claimed in the covered expenses, the books will become the property of the District to be made a part of a library for the benefit of other employees.

For non-degree programs, Employees may be reimbursed the full amount of said costs if the course or instruction is of direct benefit to the District and half the amount of said costs if the course or instruction is of indirect benefit to the District. For degree programs (i.e., Associate, Bachelor, Master’s, or Doctoral degrees), Employees may be reimbursed the full amount of said costs if the degree program is of direct benefit to the District and half the amount of said costs if the degree program is of indirect benefit to the District. A course or degree program shall be deemed to be of direct benefit to the District if it is clearly related to the employee's work and will be of immediate and specific application in his/her job. A course or degree program shall be deemed to be of indirect benefit to the District if it is generally related to water, wastewater or environmental issues or will be of value to the employee in the foreseeable future in his/her present position or a higher position in District service.

Employees shall also be reimbursed for the cost of processing fees associated with the issuance and renewal of licenses, certificates or registrations (other than class C driver’s licenses) required for their jobs. Said reimbursement shall exclude the costs of any examinations that
are a condition precedent for issuance of such documents. A “license, certificate or registration” shall be interpreted to mean one that is issued under the auspices of the regulating agency. “Required for their job” shall be interpreted to mean a license, certification or registration requirement that is required for the employee’s job or class series as determined by the District. To receive reimbursement, eligible employees must submit a request in writing giving the effective dates of the license, certification, or registration and attach copies of receipts or canceled checks documenting actual expenses incurred.

REGULATIONS and PROCEDURES

1. Financial assistance shall be granted only to permanent, full-time employees of the District.

2. Requests for financial assistance shall be made by the employee through his/her supervisor prior to enrollment in the course of instruction. Recommendations of the level of financial assistance (0, 50%, 100%) are made by the employee’s supervisor, the Department Director or Manager, and the Human Resources and Risk Manager. Final approval of educational or professional license/certificate reimbursement is from the General Manager or his/her designee.

3. Reimbursement for books and supplies shall be only for required items and not for supplemental or recommended material.

4. Employees are no: eligible for assistance under this Administrative Procedure if the training for which assistance is requested is covered, all or in part, from any other source.

5. An employee ceases to be eligible under this Administrative Procedure upon separation of employment.

6. Upon satisfactory completion of the approved training program, the employee will be eligible for reimbursement by submitting official receipts of all covered expenses and a transcript indicating the final course grade of “C” or better, or if a grade is not given, a letter written or official stationery of the training program indicating satisfactory completion of the course of instruction. For degree programs, the employee must earn a “C” or better in all courses in the relevant quarter or semester of which reimbursement is requested.

7. District approval for financial assistance shall be limited to no more than $3,000 per fiscal year for any individual employee for the duration of the employee’s enrollment in the course or degree program.
8. For advanced degrees (graduate level or above) that provide a direct benefit to the District, the General Manager may, at his/her sole discretion, approve individual requests for reimbursement beyond the duration of the employee’s enrollment in the degree program, but in no event shall the reimbursement exceed $3,000 in any fiscal year.

9. Upon separation of employment for any reason other than retirement or disability, the employee must refund all tuition refund payments made to him/her during the preceding twelve months.

RESPONSIBILITY

Employee – It is the responsibility of the employee requesting assistance to follow the provisions of this Administrative Procedure and process claims in accordance thereto.

District – It is the responsibility of Human Resources to administer the provisions of this Administrative Procedure and process claims in accordance thereto.

APPROVED:

Jerry Brown
General Manager

Attachment: Exhibit A – Educational Reimbursement Application