

California Department of Fish and Wildlife
Human Resources Branch
Human Resources Memorandum

SUBJECT: Training Policy	NUMBER: HR 15- 031
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This Bulletin revises the Department's Operations Manual Training Policy as represented by Sections 12350-12381.4 (Office of Training and Development Training Policies and Procedures) of the Fish and Game Operations Manual (FGOM). This revision replaces the text of Sections 12350-12381.4. The revised text follows:

Training Policy: Resource Allocation, Training Expense and Reimbursement

Introduction

It is the policy of the State and this Department to assure quality service to the public by developing the knowledge, skills, and abilities of employees through quality and cost-effective training and development opportunities. Such training shall be economical, effective, and consistent with the interests of the public, the Department, the State, and individual employees.

This policy was developed consistent with Government Code (GC) and California Code of Regulations (CCR) Title 2. Administration Division 1. Administrative Personnel Chapter 3. Department of Personnel Administration Subchapter 1. General Civil Rules Article 17. Training. As such, should any parts of this policy conflict with provisions of a memorandum of understanding, the memorandum of understanding shall be controlling (CCR § 599.815, GC 19995-19995.1).

Definition of Training and Categories of Training

Training is the process whereby State employees, either individually or in groups, participate in a formalized program of instruction (with lesson plan, instructor, or instructional device) to acquire skills and knowledge for their current or future job performance. The CCR §599.817 defines categories of departmental training activities as follows:

Job-Required: Job-required training is designed to assure adequate performance in a current assignment. This includes orientation training, training made necessary by new assignments or new technology, refresher training for the maintenance of ongoing programs, safety training, and training mandated by law or other State authority.

Job-Related: Job-related training is designed to increase efficiency or effectiveness and improve performance above the acceptable level of competency established for a specific job assignment.

Upward Mobility: Upward mobility training is designed to provide career movement opportunity for employees within classifications designated as low-paying occupations per Government Code (GC) Section 19400, et.al.

Career-Related: Career-related training is designed to assist in the development of career potential and is intended to help provide an opportunity for self-development while also assisting in the achievement of the Department's or the State's mission(s). Career-related training may be unrelated to a current job assignment.

Policy for Obtaining Approval for Training

All formal training to be taken on State time or at State expense must have prior approval from the employee's supervisor. For training offered by the Department, the electronic enrollment form in the training announcement includes the approval process. For training not offered by the Department (vendor training), the request must be submitted on a Training Request form (TR-290). After appropriate approval, the TR-290 is sent to the Office of Training and Development (OTD). The OTD will review and return a copy of the TR-290 to the employee indicating approval or disapproval. If the TR-290 has been approved, it is the employee's responsibility to make any necessary registration and payment arrangements. The TR-290 form is provided at:

<http://dfgintranet/Portal/LinkClick.aspx?fileticket=aB1IWJL%2fqMk%3d&tabid=64&mid=474>

Policy for Prioritizing Resource Allocations for Training Categories

Per CCR § 599.819 (a) 1-4, resources for meeting departmental training needs shall be allocated in the following priority order:

1. Job-Required
2. Job-Related
3. Upward Mobility
4. Career-Related

These priorities apply to all training activities (offered by the Department, another state department, or an outside vendor). Participation in training and development opportunities is subject to the availability of funds, operational needs, and management approval.

Policy for the Reimbursement/Payment of Training Expenditures

The Department has established the following policy, consistent with CCR § 599.819 regarding allocation of time with pay and payment for training and development related expenses:

Job-Required

When participation is identified by the appointing power as job-required, full reimbursement shall be provided for tuition and other necessary expenses, including the allocation of time with pay.

Job-Related

When participation is identified by the appointing power as job-related, full reimbursement may be provided for tuition and other necessary expenses, including the allocation of time with pay. No overtime is authorized.

Upward Mobility

An employee may participate in approved upward mobility training on State time. A supervisor may approve up to six (6) hours per week of State time (maximum). No overtime is authorized. Reimbursement from the Department shall not exceed 50% for tuition and other authorized expenses (books and supplies). For requests over six (6) hours per week and/or reimbursement exceeding 50% of expenses, written justification must be submitted to the Office of Training and Development (OTD)/Human Resources Branch (HRB) for approval. Reimbursement for travel and per diem shall not be allowed. Reimbursement for such training may be made only if the employee has successfully completed all course requirements as specified by the training provider. Successful completion is either a grade of "C" or better, or a "pass" in a pass/fail course. Employees are not entitled to reimbursement of costs related to a class subsequently taken after failing the first time.

Special note for Upward Mobility training participants: Per California Code of Regulations (CCR) § 599.984 (c): "Employees selected for upward mobility efforts shall prepare a career development plan and maintain a satisfactory level of performance on the job, in academic courses and/or in training programs to continue the program." The CDFW Career Development and Upward Mobility program and forms are available at:
<http://dfgintranet/portal/Training/CareerDevelopmentandUpwardMobility/tabid/2148/Default.aspx>
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Please note: Career Development plans are for career planning purposes. The Individual Development Plan (IDP) (STD. 637) is a plan to address development related to the employee's current work assignments. For additional clarification, please contact the CDFW Office of Training and Development.

Career-Related

Career-related training is typically completed on employee time. If State time is to be used, a supervisor may approve up to three (3) hours per week with the remaining portion of the training on employee time. No overtime is permitted. Reimbursement from the Department shall not exceed 50% for tuition and other authorized expenses (books and supplies). For requests over three (3) hours per week, and/or reimbursement exceeding 50% of expenses, written justification must be submitted to the Office of Training and Development (OTD)/Human

Resources Branch (HRB) for approval. Reimbursement for travel and per diem shall not be allowed. Reimbursement for such training may be made only if the employee has successfully completed all course requirements as specified by the training provider. Successful completion is either a grade of "C" or better, or a "pass" in a pass/fail course. Employees are not entitled to reimbursement of costs related to a class subsequently taken after failing the first time.

Extended Full-time Training

Per California Code of Regulations (CCR) §599.819(4): for full-time training of more than 60 days, the appointing power may require the employee to agree in writing to reimburse the State for tuition and other expenses paid by the State if, after completion of the training assignment, the employee does not continue employment in State service for a period of six months or twice the period of training, whichever is greater. Such reimbursement shall be made within two years after separation from State service and shall be for an amount proportionate to the specified period of service not completed.

Policy for Participation in Conferences or Professional Association Meetings

Approval to attend conferences or professional association meetings on State time and/or expense is based on the availability of funds, operational need, and management discretion. Generally, employees attend conferences or professional association meetings in one of two capacities:

- 1) The employee attends a conference or professional association meeting for professional development, which meets the definition of training in the Training Policy: Definition of Training, and Categories of Training. When attendance is for professional development, a Training Request form (TR-290) **is** required.
- 2) The employee is on the conference/meeting agenda, is working at the conference/meeting, or is representing the Department. Employees may request expense reimbursement and in such cases, a Training Request form (TR-290) **is not** required.

Policy for Reimbursement of Expenses at Conferences or Professional Association Meetings

With appropriate approvals, registration fees for conferences or professional association meetings attended for training or professional development purposes (as noted in the Policy for Participation in Conferences or Professional Association Meetings policy above), may be reimbursed. Per California Code of Regulations (CCR) §599.635: All regulations governing short-term travel and subsistence allowances will apply except employees may be reimbursed for actual subsistence expenses, supported by voucher (or other documentation, for example, a receipt or conference/meeting brochure), when the conference or professional meeting is planned and arranged by a non-state agency and if such expenses are beyond the control of

the employees. This guideline means that for a non-state agency event, when the registration fee includes any meal(s), an employee may be reimbursed for the full registration amount. In such cases, the employee shall not request separate or additional reimbursement for any meal(s) on a Travel Expense Claim.

Policy for Requesting Reimbursement of Training Expenditures

Employees request reimbursement of training expenditures using the automated CalATERS Global system. A reimbursement request must also include a completed Training Request form (TR-290). Details of the required documentation and procedures for travel expense reimbursement are provided at:

<http://dfgintranet/portal/Training/TrainingExpenseReimbursementProcedures/tabid/2180/Default.aspx>

To file a CalATERS Global travel claim, visit http://www.sco.ca.gov/calaters_global.html

Policy Regarding Use of Off-Site Facilities

The Department promotes the most economic use of funds when scheduling conferences, training, or meetings, by utilizing space that is available at no additional cost to the State. The use of rented facilities requires pre-approval and shall be considered only if the event results in a significant benefit to the State. To request approval for use of a rented facility, attach written justification to appropriate procurement documents. Consult the CDFW Business Management Branch for procedures and applicable procurement documents and your Region, Division, Branch or Administrative Officer for specific guidance when renting an off-site facility. In the past, the "Request to Schedule Conference or Meeting" form was used for this type of rental purchase. The form is no longer required.

Contact

Class schedules, enrollment procedures, and all other training-related information, including Office of Training and Development contact information, are available on the Department's Training intranet pages, here: <http://dfgintranet/portal/Training/tabid/64/Default.aspx>

Authority

CCR § 599.815-819
CCR §599.984

GC 19995-19995.1

This Policy was originally distributed in the FGOM, 2000 edition, as components of Sections 12360-123681.

Signed original on file

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