



MEMORANDUM

18422 Bear Valley Road, Victorville, CA 92395-5849 (760) 245-4271

DATE: April 29, 2005
TO: **All Classified Bargaining Unit Members**
FROM: Human Resources
SUBJECT: **Upward Mobility**

The Upward Mobility Committee has developed the attached procedures and forms to be used by unit members when seeking approval or reimbursement under Article 7 of the Agreement between the CSEA and the District.

Please be sure to have your paperwork approved before beginning classes in order to be reimbursed. The good news is that the IRS has reinstated tax-free reimbursements for educational expenses until further notice. We will update you as soon as we become aware of any changes in this tax law.

We ask that you review this packet of materials and should you have questions, please feel free to contact any of the following committee members:

Frederick Board
Ray Navarro
Kevin Crowley

Attachments: Upward Mobility Program, Article 7.1 Upward Mobility

(Corrected 5/14/2010)

UPWARD MOBILITY PROGRAM

ARTICLE 7.6 Upward Mobility

- 7.6.1** The provisions of this section (7.6) shall become effective on **July 1, 1996**.
Participating employees shall not be eligible for both Professional Growth as set forth above and Upward Mobility as set forth in this section.
- 7.6.2** The purpose of the Victor Valley College classified employee Upward Mobility Program is to assist and enable permanent classified employees to achieve their career goals at Victor Valley College.
- 7.6.3** The classified employee Upward Mobility Program at Victor Valley College will include: (see the attached pages)

UPWARD MOBILITY PROGRAM

Career Plan

Article 7.6.3.1 Career Plan

The opportunity will be provided to all permanent classified employees to identify their career goal at Victor Valley College. The employee, in cooperation with his/her supervisor, the Office of Human Resources representative, and/or counselors, will formulate a plan for reaching his/her career goal at Victor Valley College. The plan is to specifically define coursework, degrees, job shadowing opportunities and mentoring opportunities, which will prepare the employee for his/her career goal. A copy of the career plan is to be provided to the employee's supervisor, the appropriate Vice President and to the Office of Human Resources. Where necessary, the plan is to be updated or revised to reflect career goal changes. The official career goal plan is to be retained in the Office of Human Resources.

Procedures

Each **Career Plan** must contain:

1. Personal/Career goal(s)
2. Education Plan
3. Approximate timelines for completion
4. How training leave fits into employee's overall career plan (only required when applying for Training Leave under **Article 7.6.3.3**)
5. Training Leave Request Form
6. How mentoring fits into employee's overall career plan (only required when applying for Mentoring under **Article 7.6.3.6**)
7. Mentoring Request Form
8. How job shadowing fits into employee's overall career plan (only required when applying for Job Shadowing under **Article 7.6.3.7**)
9. Job Shadowing Request form
10. How cross training fits into employee's overall career plan (only required when applying for Cross Training under **Article 7.6.3.8**)
11. Cross Training Request Form
12. Employee's signature
13. Signature of individual who assisted employee in formulating career plan. (Supervisor, or H.R. representative, or Counselor, or any other advisor)
14. Copies of plan sent to appropriate Vice President, Supervisor, and H.R.



MEMORANDUM

18422 Bear Valley Road, Victorville, CA 92395-5849 (760) 245-4271

UPWARD MOBILITY PROGRAM

Career Plan
(Committee's Approval/Denial Form)

Employee's Name

Date

The Professional Growth/Upward Mobility Committee has reviewed your request for upward mobility.

Your request for upward mobility is:

____ APPROVED

____ DENIED

Comments/Reason for denial:

Committee Signatures:

VP of Human Resources

Date

Ray Navarro

Date

Frederick Board

Date

Kevin Crowley

Date

FINAL AUTHORIZATION:

____ CONCUR

____ DISAGREE

Superintendent/President

Date

UPWARD MOBILITY PROGRAM
Career Plan Form
(Complete and return to Human Resources)

Name: _____
(Print or type name)

Date: _____

I am submitting the following documents to the Upward Mobility Committee for their review and approval: (Please check the documents listed below which you have attached to this form.)

- ☐ Personal/Career goal(s)
- ☐ Education Plan
- ☐ Approximate timelines for completion
- ☐ Statement as to how Training Leave fits into employee's overall career plan (only if applying for Training Leave)
- ☐ Training Leave Request Form (only if applying for Training Leave)
- ☐ Statement as to how Mentoring fits into employee's overall career plan (only if applying for Mentoring)
- ☐ Mentoring Request Form (only if applying for Mentoring)
- ☐ Statement as to how Job Shadowing fits into employee's overall career plan (only if applying for Job Shadowing)
- ☐ Job Shadowing Request Form (only if applying for Job Shadowing)
- ☐ Statement as to how Cross Training fits into employee's overall career plan (only if applying for Cross Training)
- ☐ Cross Training Request Form (only if applying for Cross Training)

Employee's Signature

Supervisor or Counselor or H.R. Representative
or any other Advisor

Attachments

cc: Vice President
Supervisor
Human Resources

(Corrected 7/1/99)

UPWARD MOBILITY PROGRAM

College/University Classes

Article 7.6.3.2 College/University Classes

With pre-approval of their supervisor and the appropriate Vice President on district forms, employees will be reimbursed for the cost of required books, course materials, and registration fees upon satisfactory class completion with a grade of "C" or better for lower division courses taken at Victor Valley College and/or upper division coursework taken at any accredited four-year college or university which is part of an employee's career plan. Fees may not exceed those currently in effect at Cal State University, San Bernardino at the time of enrollment. Participating employees are not eligible for both fee reimbursement and Professional Growth.

Procedures for Reimbursement of Books, Registration, Material Fees Career Plan submitted/approved/filed in Human Resources

WHAT IS REIMBURSABLE COURSEWORK:

- < Coursework listed in your Career Plan, which has been approved and is on file in H.R.
- < Lower division coursework taken at VVC
- < Upper division coursework taken at any accredited four-year college or university

HOW DO I RECEIVE REIMBURSEMENT:

Complete the Upward Mobility Requisition form which is available in H.R. (sample attached) and submit to Human Resources with the following documents attached:

1. Course description, syllabus or other official document indicating the materials and books that were required for the class(es) you have taken
2. Grade report for each class(es)
 - < grade of "C" or better in each class
 - < coursework must be taken at accredited institution
 - < coursework must have been listed in Career Plan
3. Receipt(s) for all materials and books **required** for the class
4. Receipt for registration fees/tuition
 - < Reimbursement for upper division coursework may not exceed those currently in effect at Cal State University, San Bernardino, at the time of enrollment

Reimbursement of educational expenses is not subject to State and Federal taxes at this time.

(Corrected 7/1/99)

UPWARD MOBILITY PROGRAM

College/University Classes (Complete and return to Human Resources)

*This form is to be used only when classes are taken during employee's scheduled work hours.
A new form must be completed each semester/quarter.*

Name: _____
Employee's Name

Date: _____

Semester/Quarter: _____

Scheduled Classes:

Name of Course

Day(s) and Time of Course

I am requesting time off from my current work schedule to take the coursework listed above.

I have agreed to the following rescheduling of my work hours, so that I may attend the classes indicated above.

Employee's Signature

Supervisor's Signature

Vice President's Signature

UPWARD MOBILITY PROGRAM

Training Leave

Article 7.6.3.3 Training Leave

The Board of Trustees may grant to a classified employee a training leave after five years of continuous full-time service. Such leaves may be up to three months at the employee's regular pay or up to six months at 60 percent of the employee's regular pay. The period for qualifying for another leave will commence at the termination of the leave.

The employee must provide the Board of Trustees with a detailed plan which relates directly to achieving his/her Victor Valley College career goal. Failure to fulfill the plan may result in disciplinary action. The employee must agree to continue employment with the District for at least two years after returning to service or return the emolument. Any employee who is granted Training Leave shall agree in writing to file a bond with the District, which shall enable the District to reclaim any remuneration granted the employee while on leave in the event the employee does not return to the District.

Training leaves shall not be deemed a break in service, nor shall employees earn vacation days, sick leave or holiday pay provided under this agreement. Depending upon District finances, up to two full-time equivalent training leaves may be granted each year by the Board of Trustees.

Procedures

Requests for Training Leaves must include the following documents;

1. Career Plan
2. Training Leave Request Form
3. Bond (after Board of Trustees grants leave)

UPWARD MOBILITY PROGRAM
Training Leave Request Form
(Complete and return to Human Resources)

Name: _____
(Print or type name)

Date: _____

I am requesting **Training Leave** under **Article 7.6.3.3:** (Please check one)

☐ 3 month leave at employee's regular pay

☐ 6 month leave at 60% of employee's regular pay

I am requesting that my leave begin on _____
(Date)
and end on _____
(Date)

If my request for Training Leave is approved, I agree to continue employment with Victor Valley College for at least two years after returning to service or return the compensation. I also agree to file a bond with the District, which shall enable the District to reclaim any remuneration granted me while on leave, in the event I do not return to work and continue my employment for two years.

Employee's Signature

Attachment: Career Plan

Office Use: Board Approval Date _____

(Corrected 7/1/99)

UPWARD MOBILITY PROGRAM

In-Service Training Time

Article 7.6.3.4 In-Service Training Time

Classified employees are encouraged to participate in workshops and seminars offered through the Victor Valley College Staff Development Program which relate to their Victor Valley College career goals. They are also encouraged to participate in other training opportunities provided through the Victor Valley College Staff Development Program.

Procedures

Unit members seeking in-service training must complete all required forms which are available in the Victor Valley College Staff Development Program office.

UPWARD MOBILITY PROGRAM

Career Counseling

Article 7.6.3.5 Career Counseling

Through the Victor Valley College Counseling Program and the Career Resource Center, career counseling will be provided without charge for employees to assist them in formulating career goals and training/education plans.

Procedures

Unit members interested in taking college/university coursework must have career counseling and receive an Educational Plan completed by a counselor from an accredited institution. This Educational Plan will become part of your Career Plan.

UPWARD MOBILITY PROGRAM MENTORING

Article 7.6.3.6 Mentoring

The District will establish a pool of mentors from which classified employees will be encouraged to select a mentor to help guide and fortify his/her career development at Victor Valley College.

Procedures

Unit members interested in selecting a Mentor to help guide and fortify his/her career development at Victor Valley College, must complete the attached form. Mentors must be selected at Victor Valley College or employee must request Training Leave to participate in this program at another institution/corporation.

UPWARD MOBILITY PROGRAM
Mentor Request Form
(Complete and return to Human Resources)

Name: _____
(Print or type name)

Date: _____

I am requesting the opportunity to be mentored under **Article 7.6.3.6**

Individual I wish to be my Mentor _____
Mentor's Name

Title

Frequency:

I plan to be mentored:

☐ ½ day per week

☐ 1 day per week

☐ _____

Time Frame:

I am requesting that mentoring begin on _____
Date

and end on _____
Date

Employee's Signature

Mentor's Signature

Signature of Mentor's Supervisor

Attachment: Career Plan

(Corrected 7/1/99)

UPWARD MOBILITY PROGRAM

Job Shadowing

Article 7.6.3.7 Job Shadowing

Classified employees will be provided job shadowing opportunities which relate to their career goal. The major purpose of job shadowing is to clarify and crystallize career goals. A secondary purpose is to prepare classified employees for particular positions.

Procedures

Unit members interested in Job Shadowing to clarify and crystallize career goals or to prepare for a particular position, must complete the attached form. Job Shadowing is to be practiced at Victor Valley College. If employee wishes to shadow at another institution/corporation, employee must request Training Leave.

UPWARD MOBILITY PROGRAM
Job Shadowing Request Form
(Complete and return to Human Resources)

Name: _____
(Print or type name)

Date: _____

I am requesting the opportunity to Job Shadow under **Article 7.6.3.7**

Position/Individual I wish to shadow: _____
Position

Name/Title

Frequency:

I plan to shadow this individual:

☐ ½ Day per week

☐ 1 Day per week

☐ _____

Time Frame:

I am requesting that my leave begin on _____
Date

and end on _____.
Date

Employee's Signature

Shadower's Signature

Attachment: Career Plan

Signature of Shadower's Supervisor

(Corrected 7/1/99)

UPWARD MOBILITY PROGRAM

Cross Training

Article 7.6.3.8 Cross Training

Classified employees may, at the discretion of the District, be provided cross training opportunities which relate to their career goal. The purpose of cross training is to gain job-related experience in an area identified in their career goal.

Procedures

Unit members interested in Cross Training to gain job-related experience at Victor Valley College must complete the attached form. Cross Training is to be experienced at Victor Valley College. If employee wishes to Cross Train at another institution/corporation, employee must request Training Leave.

UPWARD MOBILITY PROGRAM
Cross Training Request Form
(Complete and return to Human Resources)

Name: _____
(Print or type name)

Date: _____

I am requesting the opportunity to Cross Train under **Article 7.6.3.8**

Position/Department in which I wish to cross train: _____
Position

Department

Frequency:

I plan to cross train:

☐ ½ Day per week

☐ 1 Day per week

☐ _____

Time Frame:

I am requesting to cross train beginning on _____
Date

and ending on _____
Date

Employee's Signature

Department Approval where
Cross Training will take place

Attachment: Career Plan

(Corrected 7/1/99)

VICTOR VALLEY COMMUNITY COLLEGE DISTRICT

18422 Bear Valley Road, Victorville, CA 92392-5849 • (619) 245-4271

UPWARD MOBILITY

PURCHASE REQUISITION/INVOICE NO. 26591

VENDOR **PAYEE** ☒ X

ADDRESS _____

TELEPHONE _____

SOC. SEC. # _____ X

Date ☒ X

12/10/96

SPECIAL INSTRUCTIONS

• If a Revolving Cash Check is needed, please specify the date required.
Date _____

• Reimbursement: fill out columns A, B, E, F, G and sign the Reimbursement Certification at bottom left of this form.

ADMINISTRATIVE SERVICES USE ONLY

REQUESTED BY				DEPARTMENT X		P.O. NO.		VENDOR NO.	
ITEM #	A. DATE	B. MILES	C. QUANTITY	D. UNIT	E. DESCRIPTION (Purpose/Destination)	F. UNIT COST	G. AMOUNT		
1.					UPWARD MOBILITY				
2.					SEMESTER/QUARTER: <u>Winter 96</u>				
3.					TUITION/REGISTRATION FEES		?		
4.					REQUIRED BOOKS		?		
5.					COURSE MATERIALS FEES		?		
6.					All receipts must be attached along with				
7.					course description(s), syllabi, grade				
8.					report, etc.				
9.									
10.									
11.									
12.									
13.									
14.									
15.									

REIMBURSEMENT CERTIFICATION

I certify that the above items purchased and/or mileage expense incurred were for school district purposes in accordance with the Education Code of California.

X

PAYEE/ REQUESTOR'S SIGNATURE _____

SUB-TOTAL

TAX

EST. SHIPPING

TOTAL

? ?

ACCOUNT NUMBER(S) REQUIRED

ACCOUNT
BALANCE

APPROVAL SIGNATURES REQUIRED

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

Director of Human Resources Date _____

Superintendent/President Date _____

Budget Account Manager Date _____

VICTOR VALLEY COMMUNITY COLLEGE DISTRICT
18422 Bear Valley Road, Victorville, CA 92392-5849 • (619) 245-4271

PURCHASE REQUISITION/INVOICE NO.

VENDOR **PAYEE** _____

Date _____

ADDRESS _____

TELEPHONE _____

SOC. SEC. # _____

SPECIAL INSTRUCTIONS

• If a Revolving Cash Check is needed, please specify the date required.
Date _____

• Reimbursement: fill out columns A, B, E, F, G and sign the Reimbursement Certification at bottom left of this form.

REQUESTED BY					DEPARTMENT		ADMINISTRATIVE SERVICES USE ONLY	
							P.O. NO.	VENDOR NO.
ITEM #	A. DATE	B. MILES	C. QUANTITY	D. UNIT	E. DESCRIPTION (Purpose/Destination)		F. UNIT COST	G. AMOUNT
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								
11.								
12.								
13.								
14.								
15.								

REIMBURSEMENT CERTIFICATION

I certify that the above items purchased and/or mileage expense incurred were for school district purposes in accordance with the Education Code of California.

PAYEE/ REQUESTOR'S SIGNATURE _____

SUB-TOTAL

TAX

EST. SHIPPING

TOTAL

ACCOUNT NUMBER(S) REQUIRED

ACCOUNT
BALANCE

APPROVAL SIGNATURES REQUIRED

1. _____ \$ _____
2. _____ \$ _____
3. _____ \$ _____

Budget Account Manager _____ Date _____

Budget Account Manager _____ Date _____

Budget Account Manager _____ Date _____

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

Career Plan

Permanent management group employees will have the opportunity to identify their career goal at Victor Valley College through this program. The employee, in cooperation with his/her supervisor, Human Resources representative, and/or counselors, will formulate a plan for reaching his/her career goal at Victor Valley College. **Career plans will be accepted for review on October 30 and May 30 of each fiscal year.** The career plan should focus on qualifying for a position at the college. The plan must specifically define course work, degrees, and mentoring opportunities, which will prepare the employee for his/her career goal. Specific time lines for completion must be supplied. Where necessary, the plan is to be updated or revised to reflect career goal changes. The official career goal plan is to be retained in the office of Human Resources.

Each career plan must contain the following:

- Career goal(s)
- Education plan (which may include degrees, certificates or internships)
- Time lines for completion
- Estimated costs for entire plan
- Educational/Professional Training Leave (if applicable)
 - How it fits into the overall career plan
 - Educational/Professional Training Leave Request Form
- Mentoring (if applicable)
 - How it fits into the overall career plan
 - Mentoring Request Form
- Employee's signature
- Signature of individual who assisted employee in formulating career plan

Once all this information is compiled, copies must be sent to the employee's supervisor and to Human Resources. The Upward Mobility Committee will meet to review the career plans and will forward their recommendations to the Superintendent/President within two weeks.

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

Career Plan Checklist

Employee's Name _____ Date _____

I am submitting the following documents to the Upward Mobility Committee for their review and approval. (Please check the documents listed below which you have attached to this form)

- _____ Career Goal(s)
- _____ Education Plan
- _____ Time lines for completion
- _____ Educational/Professional Training Leave Request Form
- _____ Mentoring Request Form

Employee's Signature _____

Advisor's Signature (Supervisor,
Counselor or HR Representative) _____

Attachments

cc: Supervisor, Human Resources

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

Committee Approval Form

Employee's Name _____ Date _____

The Upward Mobility Committee has reviewed your request for upward mobility. Your request for upward mobility is:

_____ Approved Pending Budget Availability

_____ Approved Pending Clarification of _____

_____ Not Approved

Comments _____

Committee Signatures:

Mary Pringle, _____ Date _____
Director of Fiscal Services

Pat Luther, _____ Date _____
Dean, Instructional Program, Health Science and Public Safety

Margie Sandello, _____ Date _____
Coordinator, Student Services

Rocio Chavez, _____ Date _____
Senior Human Resources Analyst

FINAL AUTHORIZATION _____ CONCUR _____ DISAGREE

Superintendent/President Date _____

Supervisor's Signature _____

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

College/University Classes

With pre-approval of their supervisor on District forms, employees will be reimbursed for the cost of required books, course materials, and registration fees upon satisfactory class completion with a grade of “C” or better. The classes may be taken at VVC and /or any accredited four year college or university which is part of the employee’s career plan. Fees may not exceed those currently in effect at California State University, San Bernardino at the time of enrollment.

Procedures for Reimbursement:

- Complete the Upward Mobility Requisition form (sample attached) which is available in Human Resources
- Attach a course description, syllabus or other official document indicating the materials and books that were required for the class(es) you have taken
- Grade report for each class
- Receipt(s) for all materials and books required for the class(es)
- Receipt for registration fees/tuition

REIMBURSEMENT OF EDUCATIONAL EXPENSES MAY BE SUBJECT TO STATE AND FEDERAL TAXES

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

Mentor/Job Shadowing Request Form

Employee's Name _____ Date _____

I am requesting the opportunity:

_____ To be mentored

_____ To participate in job shadowing

The individual I wish to be my mentor or to job shadow is:

Mentor/Job Shadower's Name Title

Frequency:

_____ ½ day per week

_____ 1 day per Week

_____ _____

Time Frame:

To begin on _____ and to end on _____

Employee's Signature

Supervisor's Signature

Mentor/Job Shadower's Signature

Signature of Mentor/Job Shadower's
Supervisor

VICTOR VALLEY COLLEGE
MANAGEMENT GROUP UPWARD MOBILITY PROGRAM

Training Leave Request Form

Employee's Name _____ Date _____

I am requesting Educational/Professional Training Leave for:

_____ 9-12 months at 80% of the managers regular pay

_____ Less than 9 months at the managers regular pay

To begin on _____ and to end on _____

If my request for Educational/Professional Training Leave is approved, I agree to continue employment with Victor Valley College for at least two years after returning to service or return the compensation. I also agree to file a bond with the District, which shall enable the District to reclaim any remuneration granted to me while on leave, in the event I do not return to work and continue my employment for two years.

Employee's Signature

Board Approval Date _____