
808.17 SUBJECT: REIMBURSEMENT OF EDUCATIONAL EXPENSES

:1 OBJECTIVES:

To provide financial assistance for educational expenses to employees assigned to permanent and contract positions seeking education or advanced learning while employed by the City. This policy and procedure applies to all City employees assigned to permanent and contract positions except where superceded by bargaining unit agreements.

:2 AUTHORITY:

This procedure amended by City Council September 15, 2003.

:3 DIRECTION:

Department Directors, Office Heads, Division Managers, and Human Resources Division Manager.

:4 METHOD OF OPERATION:

A. General

Financial assistance may be available to all permanent full time, permanent part-time, and contract City employees who have completed their initial probationary period and seek to improve their knowledge by participating in educational courses while employed by the City. Any employee receiving payment for such educational expense from any other source (other than a loan) shall not be eligible for the benefits provided herein. The Human Resources Division/Benefits Section shall administer the educational program for all eligible City employees.

Reimbursement for educational expenses will be considered for courses taken at any accredited educational institution, (e.g., community college, university, graduate or trade/vocational school), and where course credit is given upon completion. Funding priority will be given to “job improvement courses”.

Courses that meet the above criteria my include:

1. Job Improvement Courses

Courses directly related to the employee's current assignment that will improve the skill, knowledge and ability of the employee in performing duties and increase, through more advanced techniques, the potential for promotion. For example, an electrician working on signal devices pursues a course in electronics. Such a course will provide advanced knowledge and training in the performance of work and result in more benefits to the employee and the City.

2. Career

Courses that will increase the employee's knowledge, skills, and ability in a career path that is relevant to City government, though different from the employee's current assignment. For example, a maintenance worker enrolling in computer programming courses. While these courses may not pertain to

the employee's current duties or to a departmental career progression, they do provide an education that can be applied to City Government operations.

3. Courses that will not be considered for educational reimbursement include those for degrees not relevant to City Government, training courses, seminars, workshops, and preparatory/refresher courses, and courses for which CEUs are awarded upon completion. These types of courses are to be funded through each Department/Office/Division's travel and training budget; and employees interested in attending such courses contact their Department Director, Office Head or Division Manager regarding application and availability of funds.

B. Application Procedure

1. Employees desiring to participate in the City's Educational Program shall submit the appropriate application (Form 808.17.1, 808.17.2) to their Office on Head or Division Manager requesting approval for program participation. The Office Head or Division Manager, using the established criteria, will determine whether the course(s) qualifies for the Educational Reimbursement Program. If approved, the application will be forwarded to the Human Resources/Employee Services Program for final approval and processing.
2. The application for program participation shall provide an agreement to be signed by the employee and notarized, stipulating that should the employee's services be terminated within two (2) years of course completion date, voluntarily or involuntarily (except as provided in paragraph F), the City shall be reimbursed for funds paid to the employee for educational expenses as stated on the appropriate application (see Form 808.17.1 or 808.17.2).
3. Applications for Educational Reimbursement must be received by Personnel Management Employee Services Program no later than 5:00 PM on the beginning date of the course. Any applications received after this deadline will be denied.
4. Upon receipt and review of the application, Personnel Management will notify employee within five (5) working days, in writing, of approved and/or denied courses.

C. Reimbursement for Course Work

1. Payments for courses will be processed within the limits of available appropriation by the Personnel Management Bureau.
2. Financial assistance will be provided to cover the cost of course tuition, books, and required fees such as health fee, athletic fee, scholarship fee, service fee, or facility fee. Such expenses as late-payment fees, equipment purchases/rentals, supplies and parking/transportation costs are not covered by this program. Reimbursement shall be limited to \$1,400 to employees in permanent and contract full time positions and to \$700 to employees in permanent and contract part-time positions for course work completed during each Fiscal Year. Employees covered by a collective bargaining agreement should refer to these agreements.
3. College Level Examination Program (CLEP) courses are also eligible for educational reimbursement. Employees who satisfactorily pass CLEP exams

based on their out-of-class room experience (e.g., self-study activities, job experience) and receive full credit for a course as if it had been taken, completed, and passed, may be reimbursed for the cost of these exams.

4. After completion of the courses(s), employees must submit official completion documentation, e.g., transcript, grade reports, and receipts for tuition to the Personnel Management Bureau within thirty (30) working days. Employees attending institutions, which defer payment pending reimbursement, should submit proof of registration with an official statement of the school's deferred payment plan in lieu of tuition/fee receipts. The City will reimburse the employee for the previously approved educational expenses. Monies for educational reimbursement will be issued on a bi-weekly cycle to employees in their regular paycheck.
5. If an employee fails to attain a grade of "C" or better, a grade of "pass" in a pass/fail course, or certificate of course completion, or fails to successfully complete the course, withdraws from a course, or fails to submit official documentation of grades and receipts within the specified time (30 working days), the City will not be responsible for the reimbursement of said educational expenses. A course for which a grade of "I" (incomplete) is earned is not subject to reimbursement.
6. I.R.S. regulations require that, in certain cases, monies received by employees for reimbursement of educational expenses be reported as an adjustment to their gross income and taxed accordingly. The Employee Services Program, Personnel Management Bureau, will comply with the law or regulation in effect at the same time of payment of the reimbursement.

D. Appeal of a Denial of Application for Reimbursement

An application for educational reimbursement can be denied at two stages of the application process: 1) within the requesting employee's department by either the Bureau Chief or Department Director or 2) at Employee Services in the Personnel Management Bureau. This section establishes an appeal process for either case.

1. Denial within the employee's department

- a) When an employee's application is rejected by the employee's Bureau Chief, within five (5) working days of the denial the employee may appeal to the Department Director. The Department Director has five (5) working days to advise the employee of the decision. If the Department Director approves the application, the form shall be forwarded to Personnel Management for final approval and processing.

b) By the Department Director

If the application is denied by the employee's Department Director, the employee may appeal to the Personnel Management Bureau Chief within five (5) working days from the date that the employee is notified of the denial. The Personnel Management Bureau Chief shall evaluate the employee's appeal and shall within five (5) working days of the receipt of the appeal advise the employee of a decision.

The decision of the Personnel Management Bureau Chief shall be final.

2. Denial in Personnel Management Bureau

a) By Employee Services

If the denial is upheld by the Personnel Management Bureau Chief, the employee may appeal to the Administrative Services/Management and Budget Director within five (5) working days of the receipt of the written denial. The Administrative Services/Management and Budget Director shall render a written decision to the employee within five (5) working days of receiving the appeal. The decision of the Administrative Services/Management and Budget Director shall be final.

E. Death, Permanent Disability, Layoff

If the employee, through death, disability, or permanent layoff through no fault of employee, fails to continue the required tenure of employment as provided herein, any remaining liability for reimbursement of educational expenses shall be canceled automatically. Expiration of an employment contract or the termination of the contract prior to the expiration date will not be considered a layoff and repayment of educational expenses reimbursed will be required.

:5 FORMS:

Educational Reimbursement Program Application, Form 808.17.1 (for all employees except Fire & Police Bargaining Unit Employees); Form 808.17.2 (for Fire Bargaining Unit Employees); Form 808.17.3 (for Police Bargaining Unit Employees)

:6 COMMITTEE RESPONSIBILITIES:

None.

:7 REFERENCE:

City Council minutes of December 14, 1970, Item 37; amended June 28, 1971, Item 23; amended, July 15, 1974, Item 26; amended December 16, 1974, Item 27; amended June 7, 1976, Item 31; amended May 16, 1977, Item 6; renumbered from 708.17 and amended January 23, 1984, Item 13A-19; amended May 13, 1985, Item 15A-2; amended July 18, 1988, Item 14A-1; amended October 9, 1989, Item 20A-26; amended April 1, 1991, Item 3/43; amended June 21, 1993, Item 2-P; amended August 9, 1993, Item OO; amended December 18, 1995, Item B; amended May 11, 1998, Item 6-A; amended April 3, 2000, Item 2PPP; amended July 17, 2000, Item 3-FF; amended April 2, 2001, Item B6; amended September 15, 2003; re-formatted only April 2004.

:8 EFFECTIVE DATE:

This procedure effective September 15, 2003.