

PERSONNEL MANAGEMENT POLICY 800

Subject:	Tuition Reimbursement Policy
Purpose:	To establish a policy for Tuition Reimbursement.
Reference:	City Manager or Director of Utilities direction
Effective Date:	January 14, 2002

I. PURPOSE

The City of Tacoma recognizes the importance of continuing education to fully develop knowledge, skills and abilities which will increase job performance and effectiveness. This policy has been established to provide an opportunity for City employees to obtain additional education or training that increases competencies and develops new skills.

II. ADMINISTRATION

- A. General Government tuition reimbursement funds are administered by the Human Resources Training Division.
- B. Tacoma Public Utilities tuition reimbursement funds are administered by each division. The Tacoma Public Utilities Human Resources Administrative Services Manager certifies whether a particular course is eligible for tuition reimbursement.

III. POLICY

Subject to the adoption of appropriate funding by the Public Utility Board and City Council, partial reimbursement for tuition and course books will be available to City employees. The reimbursement rates of 75% for tuition and course books shall remain in effect unless and until otherwise revised through policy change or amendment. The City retains the right to amend or terminate the offering of tuition reimbursement at any time. Depletion of allocated tuition reimbursement funds may result in denial of requests for reimbursement.

Participation in the tuition reimbursement program is voluntary, off-hours and in no case is to be made a condition of employment. There is no guarantee or promise of promotion or new assignment as a result of courses completed. Course attendance and preparation must be on the employee's own time and **MUST NOT** interfere with the employee's job.

A. **COURSES** - The City will reimburse employees for only those courses identified within the guidelines of this policy.

1. Reimbursement for tuition and course books applies to graded, credit courses sponsored by an accredited educational institution (technical college, community college, four-year college or university). Correspondence courses must meet the criteria of this policy.
2. Tuition reimbursement is limited to one class per quarter or semester.
 - a. General Government departments may elect to approve the use of department funding for additional classes per school quarter or semester. Approval from the employee's supervisor, the Department Director or designee and the Human Resources Training Manager will be required.
 - b. Tacoma Public Utilities employee requests for additional classes per quarter or semester will require approval from the employee's supervisor, the Division Head or designee and the TPU Human Resources Administrative Services Manager.

3. Exclusions

- a. The tuition reimbursement policy does not cover course supplies, lab fees, materials, parking, transportation, food, lodging, damage deposits, student organization dues, late registration fees, service charges for deferred payment plans, thesis publication and filing fees, transcript fees, shipping charges for books when registering by mail, or career assessment courses.
- b. The tuition reimbursement policy does not cover fees assessed for professional certification exams, job-related certificates, licenses, or non-graded, non-credit, audited courses or training.

B. ELIGIBILITY

1. Partial tuition reimbursement is available to any full-time permanent or promotional probationary City employee in an appointive, elected, classified or unclassified position. Tuition reimbursement is not available to first hire probationary employees, project or part-time employees.
2. An employee must be on the active payroll at the time of application for tuition reimbursement through the date listed by the educational institution as the closing date of the quarter or semester for which the reimbursement is requested.
3. If an employee who has been approved for tuition reimbursement transfers to another City department while the course is in progress, the employee will be eligible to continue for that semester or quarter.
4. An employee taking a leave of absence from City employment for any purpose other than military or FMLA leave is not eligible for tuition reimbursement for the semester or quarter during which the leave of absence is taken.

C. APPROVAL

1. Blanket approval will not be given for all courses required for a degree or certificate. In approving applications for tuition reimbursement, the following factors shall be considered:
 - Job-relatedness of the course
 - The City's need for the course of study to be pursued by the employee
 - Recommendation by the employee's supervisor
 - Course work is related to a function of City government.
2. To establish eligibility for tuition reimbursement, the employee must complete a City Tuition Reimbursement Application/Agreement form and obtain the required approvals prior to the beginning of each quarter or semester. Management, as listed below, must review the course to ensure compliance with this policy and sign the application so indicating.
 - a. General Government applications for tuition reimbursement requires approval signed by the employee's supervisor, the Department Director or designee and the Human Resources Training Manager.
 - b. Tacoma Public Utilities applications for tuition reimbursement requires approval signed by the employee's supervisor, the Division Head or designee and the Tacoma Public Utilities Human Resources Administrative Services Manager.
3. Approval for tuition reimbursement is dependent on the availability of funds. Funds are appropriated on a first-come, first-serve basis.

D. REIMBURSEMENT

1. Once an employee has registered and paid for tuition and books for the current semester or quarter, a request for tuition reimbursement can be submitted. Receipts for tuition and books

must be presented with the request for reimbursement. Upon receipt of the required documentation, the employee will receive partial reimbursement for tuition and course books through the Finance Department reimbursement process.

- a. General Government employees will submit requests for reimbursement to the Human Resources Training Division.
- b. Tacoma Public Utilities employees will submit requests for reimbursement to their respective divisions.

2. Reimbursement Rates:

- a. High school diploma or GED certificate - 100% of Washington state resident fees for community college or technical college tuition and books.
- b. Technical Colleges - 75% of Washington state resident fees for tuition and books.
- c. Community Colleges - 75% of Washington state resident fees for tuition and books.
- d. Four Year Colleges & Universities - 75% of the University of Washington resident fees for tuition and books for undergraduate courses.
- e. Graduate/Post-Graduate Level Courses - 75% of the University of Washington resident fees for tuition and books for graduate and post-graduate courses.
- f. Resident fees for tuition less than the rates stated above will be reimbursed at 75% of the lesser rate.
- g. Reimbursement greater than the stated rates:

General Government departments may elect to approve the use of department funding for additional reimbursement per school quarter or semester. Approval from the Department Director or designee will be required.

Tacoma Public Utilities divisions may elect to approve the use of division funds for additional reimbursement. Approval from the Division Head or designee will be required.

3. Other Funding Sources

Employees eligible for education expense reimbursement from other agencies or sources (e.g., veteran's aid, scholarships, fellowships, grant-in-aid, etc.) will receive 75% tuition reimbursement from the City based on the balance remaining after financial aid deductions from all other sources.

Example:

<i>Tuition and Books</i>	=	<i>\$1,000</i>
<i>Financial Aid</i>	=	<i>\$ 500</i>
<i>Balance</i>	=	<i>\$ 500 x 75% = \$375 reimbursement from City</i>

If an employee receives 100% reimbursement from other funding sources, the employee is not eligible for tuition reimbursement from the City.

4. Successful Course Completion

Within 30 days of completion of the course, the employee is required to submit a grade transcript or certificate of completion for GED to the Human Resource Training Division (General Government employees) or to the appropriate TPU division (Tacoma Public Utilities employees). Any fees associated with obtaining a transcript or GED certificate are the responsibility of the employee. Failure to submit the required documents or failure to meet the grading standards will require that the employee reimburse the City for the full amount paid by the City for tuition and books. Grading standards are as follows:

- a. High school, technical, undergraduate college courses will be regarded as successfully completed if a grade of "C" or 2.0 grade on a 4.0 scale is achieved.

A "Pass" grade in a Pass/Fail grading system is acceptable if the school equates "Pass" to a grade of "C" (2.0 on a 4.0 scale).

- b. Graduate/Post-Graduate level courses will be regarded as successfully completed if a grade of "B" or 3.0 grade on a 4.0 scale is achieved.

5. Non-Completion of Course

If an employee withdraws from a course or is separated from City service prior to course completion, the employee agrees that the City is authorized to deduct the full amount paid by the City for tuition reimbursement from the employee's paycheck as provided below.

6. Payroll Deduction

Employees will be required to sign an authorization for payroll deduction at the time of application for tuition reimbursement that will become effective if:

- a. The employee does not submit the required grade/certificate documents within 30 days of course completion.
- b. The employee does not achieve the required grading levels.
- c. The employee does not complete the course.
- d. The employee is separated from City service prior to course completion.

This policy is in compliance with the Fair Labor Standards Act. If there are any concerns about courses of study violating the Fair Labor Standards Act, please contact the Human Resources Training Division or Tacoma Public Utilities Human Resources Administrative Services Manager.

TUITION REIMBURSEMENT APPLICATION/AGREEMENT FORM

Section 1

Date _____

Name _____

Employee Number _____ SS Number _____

Date of Employment _____

Department/Division _____

Section 2

Name of School _____

Address _____

Financial aid received - list all types & corresponding amounts (veteran's aid, scholarships, etc.)

	\$ _____
	\$ _____
	\$ _____

ATTACH A COURSE DESCRIPTION AND AN EXPLANATION OF HOW THE COURSE IS JOB-RELATED OR RELATED TO A FUNCTION OF THE CITY OF TACOMA.

Quarter/Semester and Year _____

Course Beginning Date _____ Ending Date _____

Next Line Completed by Training Division upon course completion

Final Grade _____ Date Submitted to Training Division or TPU Division _____

Section 3

Course Name & Number	Credits Semester(S) Quarter(Q)	Tuition	Books	TOTAL	75% Reimbursement <i>Training Division completes this column</i>
		\$	\$	\$	

Supervisor Approval Date

Department Director/Division Head Approval Date

TUITION REIMBURSEMENT APPLICATION/AGREEMENT FORM

Section 4

TO BE COMPLETED BY THE TRAINING DIVISION:

_____ Request Approved

\$_____ in training funds have been authorized. Charge approved expenses to account number _____.

Please notify Training & Development if course is cancelled or attendee withdraws.

_____ Request Rejected & Reason

Training & Development Manager or TPU Human Resources Administrative Services Manager/Date

Section 5

Reason for Payroll Deduction:

Did not submit grade/certificate documents within required time period _____

Did not achieve required grading levels _____

Withdrawal from course _____ Date of Withdrawal _____

Separation from City Employment _____ Date of Separation _____

Amount due City \$ _____

Training & Development Manager or TPU Human Resources Administrative Services Manager/Date

Section 6

Payroll Deduction Authorization

I hereby authorize payroll deduction for City paid tuition and books if any of the following occur during my participation in the City of Tacoma tuition reimbursement program:

1. I do not submit the required grade/certificate documents within 30 days of course completion
2. I do not achieve required grading levels
3. I do not complete the course
4. My employment with the City of Tacoma ends prior to course completion.

I understand that the full amount paid by the City will be deducted from my paycheck in up to six (6) installments at the discretion of the Finance Department, unless my employment with the City ends, in which case, the full sum owing to the City will be deducted in one (1) lump sum.

Employee Signature

Date