

Date: 02/01/06

## Education and Training Reimbursement

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### I. Purpose

This policy establishes guidelines for reimbursement of education and training costs and provides eligible employees with the opportunity to obtain, maintain, or improve job-related capabilities through participation in academic courses or training seminars and workshops.

### II. Policy

#### Employees Eligible for Reimbursement

Regular employees who have successfully served a probationary period and have been continuously employed by the City of Petaluma for at least twelve (12) months are eligible to receive reimbursement for education and training expenses as outlined in this policy.

#### Type of Education and Training Eligible for Reimbursement

The following types of education and training are eligible for reimbursement:

1. Academic courses taken at an academic institution which is accredited by any of the following organizations: Western Association of Schools and Colleges, Northwest Association of Schools and Colleges, Southern Association of Colleges and Schools, and the New England Association of Schools and Colleges. Coursework may include undergraduate, graduate, university extension, and university continuing education courses. Such courses may be taken for academic credit or on an "audit" (no grade) basis.
2. The academic courses or training seminars or workshops must be specifically job-related and should provide the employee with skills, knowledge, and competencies applicable to the employee's current position which enhance job performance or prepare the employee for career opportunities at the City of Petaluma.

#### Types of Education or Training NOT Eligible for Reimbursement

1. This policy does not provide reimbursement or payment for mandatory training seminars, workshops, and/or certifications.
2. Reimbursement for law school courses generally will not be approved. Only if the employee's Department Director and Human Resources certifies that the law courses are specifically relevant to the employee's current position will such a request for reimbursement be considered.

#### Education and Training Reimbursement

Education and Training coursework is eligible for reimbursement only if the:

1. Coursework is job and/or career-related as defined in this policy; and
2. Coursework receives prior approval in accordance with this policy; and
3. If the coursework is taken for academic credit, the coursework is successfully completed with a minimum final grade of "C" or equivalent.

Fees eligible for tuition reimbursement include state education fees, state university fees, state college fees, junior and community college enrollment and registration fees for California residents, book costs, continuous enrollment fees for thesis/dissertation, microfilming or binding of dissertation or thesis fees, computer fees, and laboratory fees that are directly applicable to the approved coursework.

### **Reimbursement Amount**

An employee may be approved for reimbursement for education and training fees allowed by this policy up to a maximum of one thousand dollars (\$1,000) per fiscal year.

### **Retention of Textbooks or Other Course Materials**

Textbooks or other materials required by the coursework may be retained by the employee.

### **Expenses Which Are Not Reimbursable**

The following is not reimbursable under this policy:

College/university entrance exam fees; fees for review programs for entrance exams; courses at non-accredited institutions. Application/pre-admission registration fees, transcript fees, test preparation fees, admission testing fees, placement fees, course waiver or challenge fees, travel costs (i.e., transportation), parking fees, equipment/kit purchase costs, tutoring fees, deferred tuition fees, registration fees, late registration fees, course addition fees, costs related to life experience or prior learning experience credits, regardless of whether the institution has been accredited; deletion or transfer fees, student activity fees, student union fees, petition fees, recreation fees, health coverage costs, dissertation or thesis typing fees.

### **Reimbursement for Personal Development Courses**

Employees may be reimbursed for up to twenty-five dollars (\$25.00) for personal development per fiscal year. Reimbursement may be for books, classes or training that enhances personal development. Reimbursement shall not be for gym fees, personal grooming or sports equipment.

### **Reimbursement for Employees Who Are Voluntarily Separated or Terminated for Cause**

Employees who voluntarily separate from employment, or are terminated for cause, prior to course completion, or have not met the conditions outlined in this policy, will not receive reimbursement.

### **Tax Considerations**

The taxability of payments under the tuition reimbursement plan is in accordance with current Internal Revenue Service guidelines.

## **III. Procedures for Obtaining Reimbursement**


1. Prior to enrolling in the course of study, the employee must obtain written approval on the Education and Training Reimbursement Request/Approval Form (Appendix A-1).
2. To obtain approval, the employee must complete the Education and Training Reimbursement Request/Approval Form and submit the form to his or her Department Director for approval. The Department Director will

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- review the employee's request, certify whether the coursework meets policy criteria, and return the form to the employee.
3. After obtaining approval from the Department Director, the employee should forward the approval form, along with supporting material relating to the coursework, to Human Resources. Human Resources will assess and approve or disapprove the coursework in accordance with the policy criteria.
  4. Following review, Human Resources will notify the employee in writing on the approval form whether the request for reimbursement was approved.
  5. Once the coursework has been successfully completed, the employee must submit the approval form, a copy of the transcript containing the final grade for the course, and receipt(s) for reimbursement to Human Resources for processing.
  6. Upon receipt of these required items, reimbursement will be issued to the employee.

Approved:

  
\_\_\_\_\_  
Michael A. Bierman, City Manager

  
\_\_\_\_\_  
Date

Established: 09/23/1999  
Revised: 02/01/2006



**CITY OF PETALUMA**  
**Education and Training Reimbursement**  
**Request/Approval Form**

*To be completed by Employee*

**I. Request for Education and Training Approval**

I request prior approval for the following coursework:

Date of Course	Title of Course	Tuition Amount
School/Organization		Location
My Educational and/or Career Development Goal(s) are: _____		

Employee's Signature	Printed Name	Date
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*To be completed by Employee*

**II. Request for Personal Development Reimbursement**

I request reimbursement for the following personal development:

Personal development purchase:  Book(s)  Class  Training  Other

Specific personal development purchase or activity: \_\_\_\_\_

Employee's Signature	Printed Name	Date
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*To be completed by Department Director*

**III. Education and Training Approval (Department Director)**

I have reviewed this employee request and certify that the coursework meets policy criteria and recommend approval for reimbursement.

Department Director Signature	Printed Name	Date
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*To be completed by Human Resources*

**IV. Education and Training Approval (Human Resources)**

I have reviewed this employee request and certify that the coursework meets policy criteria.

Human Resources	Printed Name	Date
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*To be completed by Employee upon course completion*

**V. Request for Reimbursement**

Total Tuition \$ \_\_\_\_\_  
 Other Reimbursable Fees \$ \_\_\_\_\_  
 Total Amount Requested \$ \_\_\_\_\_

I request reimbursement in the amount of \$ \_\_\_\_\_. Attached is my final grade and receipts.

Approval for Reimbursement (HR Use Only)	
Human Resources	Amount to pay \$ _____
Date	_____