



# city of san luis obispo

## EDUCATIONAL REIMBURSEMENT PROGRAM

Updated January 2009

### PURPOSE

The purpose is to establish guidelines and procedures for the approval and processing of educational reimbursement requests. The Educational Reimbursement Program is designed in part to enhance the City's equal employment opportunities and as an integral part of the City's commitment to succession planning.

### POLICY

It is the policy of the City of San Luis Obispo to encourage excellence of performance, employee development, and the ability to promote at all levels by sharing the cost of educational, professional licensure, and certification programs. While the Educational Reimbursement Program addresses one aspect of this cost sharing, departments are encouraged to establish their own policies and/or guidelines to address reimbursement or payment of costs associated with obtaining professional licensure, certification, or educational opportunities that fall outside the scope of this program.

The City will reimburse educational costs which are directly related to the employee's occupational field with the City or are related to and part of a planned course of study being actively pursued for promotion within the City service. For this purpose, the City shall reimburse up to \$1,500 annually (**July 1 – June 30**) for the costs of tuition, registration, books and lab fees. Travel and parking are not covered expenses.

There shall be no obligation to the City to reschedule the normal work hours of eligible employees to facilitate their participation in the Educational Reimbursement Program. However the City should, to the best of their ability, accommodate reasonable participation.

### ELIGIBILITY REQUIREMENTS

To be eligible for the program the employee must be a regular employee with the City of San Luis Obispo. A pro-rated amount will be calculated for regular part-time employees (i.e., a regular half-time employee could receive up to \$750 annually).

Courses must be taken for credit; audited courses will not be reimbursed. Additionally, the employee must satisfactorily complete the course and receive a grade of "C" or better or a "pass" in a pass/fail grading.

### ELIGIBLE COURSES

1. Eligible courses must have a reasonable potential to offer substantial benefit to the City.
2. Eligible courses must be directly related to the employee's occupational field with the City, or directly related to and part of a planned course of study being actively pursued for promotion and career development with the City.
3. Eligible courses must be presented by an accredited high school, college, university or other accredited institutions.

## **INELIGIBLE COURSES**

1. Courses taken to bring unsatisfactory job performance up to an acceptable level.
2. Courses that duplicate in-service training or other training the employee has already received.
3. Courses an employee is required, by the Department Head, to attend will be considered training and will not be reimbursed through the Educational Reimbursement Program.
4. Courses for which the employee receives reimbursement from any other sources.

## **CONTINUED SERVICE REQUIREMENT**

An employee must continue in a regular position in the City service for one year from the date of completion of the course. Failure to continue in the City service, through resignation or discharge, will result in the forfeiture of any educational reimbursement payments received up to one year prior to separation. The maximum forfeiture amount would be equivalent to total reimbursement received within the previous 12 month period. In such situations, the employee agrees that the Finance Department is authorized to make a deduction from the employee's final payroll check for the appropriate amount of education reimbursement to be forfeited.

## **PROCEDURES**

The employee shall submit a completed Educational Reimbursement Approval Application form to his/her Department Head for approval at least three weeks prior to the first class session. The Department Head will forward the form indicating approval or disapproval within five working days to the Director of Human Resources. The completed form indicating approval or disapproval from the Director of Human Resources will be returned to the employee within another five working days. Should an employee enroll in a course which starts in one fiscal year and ends in another, the educational reimbursement benefit will be counted for the fiscal year the employee began the course.

When either the Department Head or the Director of Human Resources does not approve the course, an appeal may be made to the City Manager for a final decision.

Upon completion of the course, the employee shall submit a completed Request for Educational Reimbursement Payment form to the Department of Human Resources with the required documents in the form of a transcript or a grade card signed and dated by the instructor and receipts for registration, tuition, lab fees and books.

A copy of the request will be forwarded to the Finance Department. They will issue a check in the proper amount. A copy of the approved request and proof of completion will be filed in the employee's personnel file.