

Education Reimbursement**4.3.1****PURPOSE**

The purpose of the City's Education Reimbursement Program is to encourage City employees to improve their job skills and performance by providing financial assistance for successful completion of job-related academic, professional, and technical course work. To qualify for reimbursement under the program, the proposed course work must improve the employee's skills and knowledge as required by the employee's present position; benefit the employee's professional development as a City employee; or enhance the employee's career development with the City of San Jose.

This section describes the conditions and procedures for obtaining reimbursement for qualifying course work by non-management City employees. Education reimbursement for management employees is covered by the Professional Development Program.

AUTHORITY

The Director of Human Resources, in cooperation with the appointing authority, shall establish and maintain a system for administering the education reimbursement policy and shall be the final authority for the application of the policy.

POLICY**A. OVERVIEW**

Under the Educational Reimbursement Program, employees may be reimbursed for the cost of registration, tuition, and required textbooks of qualifying courses. The percentage of the cost which will be reimbursed, the total amount of reimbursement allowed each fiscal year and the type of courses covered by this program are determined by the applicable Memorandum of Agreement (MOA). *Employees must submit the Request for Reimbursement Form to their supervisor and Department Director no less than two (2) weeks before the course work begins.* The supervisor and/or Department Director may or may not approve reimbursement based on guidelines determined by the applicable MOA and this policy. If the request is approved, employees will receive the reimbursement *after* the course work is completed in their paychecks. Employees must receive a letter grade of 'C' or better for coursework receiving a grade. If a course is given on a credit/no credit or attended/not attended basis, an employee must receive a "credit" or "attended" to qualify for reimbursement. Employees may appeal the denial of education reimbursement to the Director of Human Resources. Employees may also be eligible to receive a prorated amount of education reimbursement for non-college accredited courses and others as listed in the applicable Memorandum of Agreement up to the amount specified in the applicable MOA.

B. ELIGIBILITY

Employee must be a full or part-time benefited employee and have passed probation by the start date of the course.

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- a. Course work for regular academic units of credit from an accredited university, college, or community college qualifies for the Education Reimbursement Program.
- b. Whether employees may use the Education Reimbursement Program for other types of course work (e.g. continuing education units, adult education classes, certification examination fees, professional membership dues/licenses/professional certificates, and job-related workshops/seminars/conferences) depends on the employee MOA.
- c. The course work must relate to the employee's current or anticipated duties and assignments as a City employee. To qualify for reimbursement under the program, the proposed course work must:
 1. Improve the employee's skills and knowledge as required by the employee's present position; or
 2. Benefit the employee's professional development as a City employee; or
 3. Enhance the employee's career development with the City of San Jose.

For example, the proposed course work can:

- prepare employees for significant technological changes occurring within the employee's career field; or
 - prepare employees for new duties due to a change in assignment; or
 - prepare employees to assume new and different duties as a result of a promotional appointment; or
 - prepare employees for promotional opportunities within the City of San Jose based on a logical educational plan of accomplishment approved by the employee's supervisor and department director.
- d. Reimbursement is authorized only for courses involving actual class time.
 - e. Employees must receive a letter grade of 'C' or better for coursework receiving a grade. If a course is given on a credit/no credit or attended/not attended basis, an employee must receive a "credit" or "attended" to qualify for reimbursement.
 - f. Employees must take the course on the employee's own time. City time may not be used to attend educational opportunities covered by this program. If a course is only offered during regularly scheduled work hours, the employee's supervisor and department director may make reasonable efforts to adjust work schedules to accommodate the scheduling conflict.
 - g. Credit awarded for life or work experience is ineligible for reimbursement.
 - h. A maximum of nine (9) units will be allowed for thesis and required project class seminars.

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D. REIMBURSEMENT

- a. If employees qualify, they will be reimbursed for the cost of registration, tuition, and required textbooks as determined by the applicable MOA. The maximum amount that employees may be reimbursed each fiscal year is also determined by the applicable MOA. The applicable MOA also specifies the maximum amount that employees may be reimbursed for different types of course work.
- b. Employees must report any financial assistance funds received from another agency or source in the request for reimbursement. In no event shall reimbursement received from this program, plus reimbursement from other educational incentive programs, exceed the total cost of registration, tuition, and required textbooks. If the total amount of reimbursement from the City and other sources exceeds the total amount of approved expenses, the City will reduce the amount to be reimbursed accordingly.
- c. The deadline for submitting Education Reimbursement Forms for any expenses of the prior Fiscal Year is the end of the **second full pay period of July**.

PROCEDURES

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| Employee | 1. Completes Section I of the Request for Education Reimbursement Form and attaches copy of the course description to the request form. Submits the request form to their supervisor department director <i>no less than two weeks before the course work begins</i> . |
| Supervisor | 2. Reviews the request, verifies eligibility and job relatedness, and completes Section II of the request form. Submits the form to the Department Director for review and signature. |
| Department Director | 3. Reviews the request and completes Section III of the request form. Returns the form to the employee within one week of submission. |
| Employee | 4. Retains the original request form. |

If the request is denied, the employee may appeal the denial to the Director of Human Resources. Submit the appeal in writing prior to the start of the course work. The appeal should include the original Education Reimbursement Request Form, a copy of the course work information, any additional information appropriate and the reason that the employee believes the course work does qualify for education reimbursement. The employee will be notified in writing of the decision of the Director of Human Resources prior to the start of the course work. The decision of the Director of Human Resources is final.

If the request is approved, submits transcript, grade report or proof of attendance, list of required textbooks, and receipt(s) to the department fiscal staff once the course is completed.

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Fiscal Staff

- 5. Completes **Section IV** of the request form, attaches documentation of satisfactory completion and receipt(s) to request form. Forwards paperwork to Payroll in the Finance Department. Reimbursements for any expenses of the prior fiscal year must be submitted to Payroll in the Finance Department before the end of the **second pay period in July**.

NOTE: If a course, which has been approved by the employee’s supervisor and department director, is cancelled and then rescheduled, the employee does not need to resubmit the education reimbursement request form. The employee should notify in writing, their supervisor and department director, specifying the name of the course, the original date/s and the rescheduled date/s.

Approved:

/s/ Jennifer Schembri
Director of Employee Relations

July 17, 2015
Date

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Education Reimbursement for Full-Time and Part-Time Benefited Non-Management Employees

Bargaining Unit	Benefits
<p>Association of Building, Mechanical and Electrical Inspectors (ABMEI)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, fees, and textbooks for college accredited courses <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, Continuing Education Units, Adult Education classes, workshops, membership dues in professional associations, professional licenses, and professional certificates. <p>See MOA Section 5.9 for further information.</p>
<p>International Brotherhood of Electrical Workers (IBEW)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, continuing education units, Adult Education classes, workshops, membership dues in professional associations, professional licenses, and professional certificates <p>See MOA Section 5.12 for further information.</p>
<p>International Association of Firefighters (IAFF)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, and required textbooks. <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, continuing education units, Adult Education classes, workshops, membership dues in professional associations, professional licenses, and professional certificates <p>See MOA Section 7 for further information.</p>
<p>Municipal Employee Federation (MEF)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, fees, and textbooks for college accredited courses. <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, online courses, continuing education units, Adult Education classes, job-related workshops and membership dues in professional associations, professional licenses, professional certificates <p>See MOA Section 13.10 for further information, and Section 13.10.1 regarding reimbursement rates for Part-time Benefited employees.</p>

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Bargaining Unit	Benefits
<p>International Union of Operating Engineers (OE #3)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, and textbooks for college accredited courses. <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredit courses, workshops, membership dues in professional associations, professional licenses and professional certificates. <p>See MOA section 5.12 for further information.</p>
<p>San Jose Police Officer's Association (POA)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, and textbooks for college accredited courses. <p>Up to: \$600 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, online courses, continuing education units, Adult Education classes, job-related workshops and membership dues in professional associations, professional licenses, professional certificates
<p>Unclassified Non-Management Employees (Unit 82)</p>	<p>Fiscal year maximum: \$1000</p> <ul style="list-style-type: none"> ▪ Reimbursement rate: 100% for registration, tuition, fees and textbooks for college accredited courses. <p>Up to: \$300 (of \$1000 fiscal year maximum)</p> <ul style="list-style-type: none"> ▪ Non-college accredited courses, continuing education units, Adult Education classes, job related workshops, and membership dues in professional associations, professional licenses; and professional certificates

