

**CITY OF MISSION VIEJO
Administrative Regulations**

OFFICE OF THE CITY MANAGER

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		Revised:	03/16

SUBJECT: EDUCATION REIMBURSEMENT PROGRAM

1. Purpose. The City of Mission Viejo offers education reimbursement for employees voluntarily wishing to enhance their job knowledge, skills, and abilities. The subject matter of courses taken by City employees should relate directly to the functions of the City, or be a required course for the degree sought and contributes to the performance of that employee in his or her present City position or a promotional position, which he or she may reasonably expect to obtain.

2. Authority. Authority for the issuance of this policy comes from Municipal Code Section 2.08.060 and City Council Action dated September 11, 1991 and July 6, 2004.

3. Application. This regulation applies to all full-time and part-time at-will, regular and promotional probationary employees of the City of Mission Viejo. This program does not apply to probationary, hourly/seasonal/temporary (HST) employees or Councilmembers.

4. Policy/Procedure.

 Employee Eligibility.
 - 4.1 To be eligible for the Education Reimbursement Program, only full-time and part-time at-will, regular and promotional probationary employees performing their job in a successful manner shall be eligible to participate in this program. Courses must commence after passing the employee's initial probationary period.

 - 4.2 Employees must be in an active pay status during the entire duration of the course. Employees on any paid or unpaid leave of absence, including but not limited to disability leave, a medical

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leave, and/or workers' compensation leave, are not eligible for the program.

Eligible Studies.

- 4.3 Employees may be reimbursed only for courses of study that the City determines are directly related to the employee's present job or that will enhance the employee's potential for advancement to a position within the City and to which the individual has a reasonable expectation of advancing.
- 4.4 Courses must present a reasonable likelihood that the City and the employee will receive some long-term benefit. Courses must possess sufficient core curriculum to be viewed as legitimate academic pursuits. Courses that are geared to the personal satisfaction or enjoyment of the employee are not reimbursable.
- 4.5 Only educational institutions accredited by one of the Council for Higher Education Accreditation (CHEA) Regional Institutional Accrediting Agencies, as listed at www.chea.org, is eligible for reimbursement. The educational institution must be accredited at the time instruction begins and at the time instruction ends.
- 4.6 Employees are expected to schedule class attendance and the completion of study assignments outside of their regular working hours on the employee's own time. It is expected that educational activities will not interfere with the employee's work, and unsatisfactory job performance during enrollment will result in the forfeiture of education reimbursement. Course attendance, under this program, during an employee's working hours are to be taken as Comprehensive Annual Leave (CAL).

Eligibility Review.

- 4.7 Prior to incurring any expense for reimbursement, employees requesting education reimbursement must receive approvals from their division manager and department director at least two (2) weeks prior to the first day of class using the appropriate Education Reimbursement Application form.
- 4.8 The division manager and the department director will review the request and note either approval or denial. If the request is

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denied, the request will be returned to the employee with the reason(s) for denial noted.

- 4.9 Department approved forms are forwarded to the City Manager to receive final approval or denial. If the request is denied, the request will be returned to the employee with the reason(s) for denial noted.
- 4.10 After the City Manager has approved the course of study, the form will be forwarded to Human Resources for distribution.

Payment Requirements and Obligations.

- 4.11 Funds received from outside sources, such as a scholarship, grant, or veteran's educational benefits, must be applied toward the cost of the eligible expenses before the City's funds are applied. If an employee receives tuition payments or funds from other sources for college-level coursework at an accredited college or university, the City will contribute the difference between the amount the employee receives from the other source and the eligible costs incurred by the employee to the maximum allowed under this program.
- 4.12 This regulation focuses primarily on traditional undergraduate or graduate level courses that result in a grade. No reimbursement will be made for a grade lower than "C" for courses in an undergraduate program, and no reimbursement will be made for a grade lower than "B" for courses in a graduate program. For courses without grades, proof of successful completion is required. Courses taken on an audit basis are not eligible for reimbursement.
- 4.13 No coursework beyond a Master's Degree or any law school coursework is eligible for reimbursement. Employees will be limited to reimbursement for a maximum of one (1) Master's Degree.
- 4.14 Programs leading to professional certification must be in a specific job-related field of professional discipline, and should provide the employee with skills, knowledge and competencies applicable to their current position.

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- 4.15 Expenses for management seminars, professional meetings and other external seminars/training are not reimbursable under this program. While continuing education is encouraged, such training is reimbursable under the individual department's budget at the department director's discretion.
- 4.16 Coursework shall not be eligible if it duplicates in-house training.

Eligible Expenses.

- 4.17 Employees must pay tuition and other related costs and fees directly to the educational institution. The City will not advance funds towards the cost of this program. Employees are required to maintain and submit original receipts with the Request for Expense Reimbursement Payment form.
- 4.18 The City shall reimburse employees for the cost of tuition, registration fees, textbooks, and lab fees required for each eligible course upon proof of payment and course completion. Expenses for transcripts, catalogs and/or schedules, processing fees (i.e., such as application fees and/or graduation audit fees), parking, travel, mileage, meals, non-course fees (i.e., such as student association fees and/or insurance fees), miscellaneous supply fees, and any other costs are not reimbursable.
- 4.19 Full-time employees may receive a maximum total amount of \$2,500 per fiscal year. Part-time employees with a full-time equivalent (FTE) of .750 to .999 may receive a maximum total amount of \$1,875 per fiscal year. Part-time employees with an FTE of .500 to .749 may receive a maximum total amount of \$1,250 per fiscal year.
- 4.20 Employees participating in the Education Reimbursement Program that change FTE during the fiscal year, will have their maximum total reimbursement pro-rated based upon the amount of service in each FTE. (For example, an employee works .625 FTE for 5 months and works 1.000 FTE for the remaining 7 months of the fiscal year. This employee's maximum total reimbursement would be \$1,979.16.)

Application for Payment.

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- 4.21 No later than sixty (60) calendar days after completing the approved course(s), the employee must submit the completed Request for Expense Reimbursement Payment form to Human Resources, along with original receipts and official grade(s).
- 4.22 Human Resources will forward the approved and completed Request for Expense Reimbursement Payment form to the Finance Division for payment.

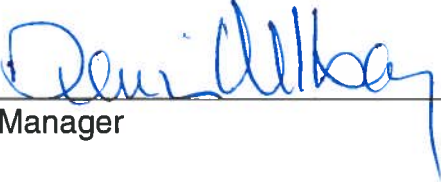
Miscellaneous.

- 4.23 City vehicles shall not be checked out for transportation to and from course(s). No allowance will be given for mileage or transportation costs.
- 4.24 Human Resources will maintain records of all education programs completed by each employee, including but not limited to copies of diplomas, certificates, and/or grade notices.
- 4.25 Employees participating in education reimbursement must agree to remain in the employ of the City for at least one (1) year following course completion. Employees who separate from employment for reasons other than layoff or involuntary separation, within the one (1) year period shall reimburse the City for Education Reimbursement benefits applicable to courses completed during the previous year by deduction either prior to or concurrent with issuance of the employee's final paycheck.
- 4.26 Reimbursement for education will be charged against the budget for the fiscal year in which the course of education is completed.
- 4.27 Unused funds may not be carried over from one fiscal year to the next.
- 4.28 Should the Education Reimbursement Program be limited to the available, budgeted funds, and in the event of demand greater than funds, the funds will be allocated to as many employees as possible. In this event, it may be necessary to reimburse on a percentage basis.
- 4.29 Education reimbursement may be considered taxable income in some instances. The City will report Education Reimbursement

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payments to the Internal Revenue Service in keeping with current tax regulations.

- 4.30 All policies and regulations are subject to change at any time, and without advance notice.



City Manager

3/16/16

Date