

EMPLOYEE EDUCATION ASSISTANCE

The City is committed to both attracting and retaining top talent who seek increased responsibility and growth within their professional careers. A well-rounded education in an employee's career field can enhance his or her skill base and make an employee more valuable to the department and the City as a whole. To encourage the professional and personal development of every City employee, the following policy establishes reimbursement to an employee for tuition and fees of technical, associate, undergraduate, graduate, and post-graduate courses in regionally accredited universities.

Degrees pursued must be deemed pertinent and relevant to the employee's present or future position with the City; thus the opportunity to participate in the tuition reimbursement program should not be construed as a universal benefit, and is subject to yearly appropriation of sufficient funds to implement the program. Benefits will be provided on a first come first served basis subject to available funds budgeted each year in the City's General Fund budget.

1. Employee Eligibility

All full-time employees of the City who are not currently eligible for a City sponsored education assistance program are eligible for educational assistance in accordance with this policy contingent upon:

- A. The completion of the initial six (6) months of probation and acceptable City work history, including no major disciplinary infractions in the six months prior to course enrollment,
- B. The approval of an application for educational assistance by City-County Personnel,
- C. The course schedule does not interfere with an employee's work schedule, and
- D. The employee is enrolled in courses which are part of an approved, accredited degree program.

2. Application Procedure

In order to participate in the Employee Education Assistance program, the employee should, prior to enrollment, submit to City-County Personnel the Employee Application for Educational Assistance (Exhibit 1) and proof of admission to the requested program. City-County Personnel will respond to the application in writing, stating approval or denial.

Acceptance into the program will be dependent upon the employee's work history, the requested degree sought, and the availability of Employee Education Assistance funds budgeted.

3. Reimbursement Procedures

- A. Within thirty (30) days upon successful completion of each course, the employee must submit the Reimbursement Application & Grade Report form (Exhibit 2) to the Department Head. The following support must be attached to this form:
 - A statement or validated grade report from the college or university showing that the employee, while still employed with the City, successfully completed the

course with a grade C or better for undergraduate courses, and a grade B or better for graduate or post-graduate courses.

- Copies of the actual paid receipts or statements from the college or university that show the employee paid the full tuition and fees with their own means (i.e., credit card statements, debit card receipts, cancelled checks, and/or detailed statement from the school).
- B. If an employee terminates during the course semester, he or she forfeits any claim to reimbursement. Additionally, an employee must notify City-County Personnel immediately upon dropping any course. The City will not reimburse for expenses associated with dropped courses.
- C. An employee will not be reimbursed for any portion of tuition and fees that were funded with a scholarship or Federal grant funds. Expenses funded by the employee's student loan are subject to reimbursement.
- D. Reimbursements are subject to Internal Revenue Code Section 127, which provides for up to \$5,250 of educational assistance to be excluded annually from an employee's income over the course of a calendar year. The maximum allowable benefit for this program is \$5,250.

4. Education Assistance Terms

Employees who have received educational assistance must commit to work for the City for two (2) years from the date of the last reimbursement. If an employee separates employment prior to completing the promised time, he or she will be responsible for paying back the following percentage of educational assistance received:

- 0 – 12 months after completion and assistance – 100%
- More than 12 – 24 months after completion and assistance – 50%

If the employee fulfills his or her obligation of working for two years after reimbursement, the employee's obligation will be discharged.

Employees will sign an Employee Education Assistance Promissory Note (Exhibit 3), which expresses the acceptance of these terms and allows the City to withhold the repayment amount from his or her final payroll check if the employee separates employment before the completion of the two-year commitment.

**City of Montgomery
Employee Educational Assistance Application**

Prior approval by City-County Personnel is required for Tuition Reimbursement. Attach proof of admission to the requested program.

Date: _____

Employee Name: _____

Employee ID: _____

Department Name: _____

Job Title: _____

University or College: _____

Degree Sought: Technical [] Associate's [] Bachelor's [] Master's [] Doctorate []

Major _____ Minor: _____

Term: Quarter [] Semester [] Mini Term []

List Subjects:

Tuition Rate per Hour \$: _____ Number of Hours: ____ Eligible Amount \$: _____

To be completed by City-County Personnel

Application Approved _____

Application Wait listed _____

Application Denied _____

Reason for wait list/denial if applicable:

City-County Personnel

City-County Personnel: Copy to Department Head and Employee

**City of Montgomery
Employee Educational Assistance
Reimbursement Application & Grade Report**

I have completed the course(s) and submit my expenses and grade report for reimbursement (receipts attached):

Course	Grade	Cost
Course	Grade	Cost

Reimbursement Calculation

Tuition and Fees _____
Less Federal Grants (_____)
Less Scholarships (_____)
Less Tuition Discounts (_____)
Less Other (_____)

Total Reimbursement Requested _____

Employee ID _____

Employee Name _____

Employee Signature _____ Date _____

Department Head Approval _____ Date _____

Finance Department Approval _____ Date _____

Original to Accounts Payable with SPA. Copy to Employee File.

***Must be submitted within 30 days of completion of course work.**

City of Montgomery
Employee Educational Assistance Promissory Note

Date: _____

Employee Name: _____

Employee ID: _____

Amount: _____

By signing this note, I agree that:

1. I (the employee) commit to two (2) years of employment with the City of Montgomery as of _____, 20____, the date of my last educational assistance reimbursement. If I separate prior to completing my commitment, I will be responsible for repaying the educational assistance as follows:

- 0 – 12 months after completion and assistance – 100%
- More than 12 – less than 24 months after completion and assistance – 50%

2. I (the employee) authorize the City of Montgomery to withhold from any compensation due to me, any and all amount of the education assistance repayment due to the City.

3. I (the employee) will be discharged of any repayment obligation after the completion of my employment commitment.

Employee Signature

Witness Signature

Original to Payroll. Copy to Employee.