

<u>Subject:</u> Education Reimbursement – Degree Seeking Program	<u>Date Established:</u>	<u>Total Pages:</u> 3
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Overview:

The City of Dunedin (City) recognizes that continuing education is a key component to employee development and retention, and should be encouraged. The education reimbursement – degree seeking program is designed to benefit both the employee and the City. The City is making an investment in the employee's education with the intent of having a well-educated workforce as a return on that investment. For that reason, this policy has been established to motivate employees of the City to obtain additional education or training that will enhance the employee's job performance and prepare them for future advancement opportunities at the City.

Eligibility:

This policy applies only to degree and vocational/trade school programs. To qualify, the employee must have successfully completed his/her initial employment probationary period and be actively employed with the City at the time of reimbursement. The employee should also receive annual evaluations with an overall rating of at least Competent/Proficient. Reimbursements shall be made according to the following priority: employees who were already enrolled in a degree/trade school program at the start of the current fiscal year, then employees who begin a program during the current fiscal year. In accepting tuition reimbursement from the City, the employee will agree to a two year "buy-back" for all approved paid courses (see below).

Policy:

The City may, as funds are available and the employee has not reached the maximum annual education reimbursement cap (as determined by the Internal Revenue Service (IRS)) reimburse an employee for tuition, fees and books after satisfactory completion of all pre-approved courses, provided the degree program/course has been approved by the City. The courses taken to complete the degree must: 1) be through technical institutes, trade schools, or accredited colleges, universities or other City-approved institutions, and 2) meet the degree criteria that leads to a trade school certification or an undergraduate degree that is relevant to the employee's current role, or an applicable role in the City. Examples include:

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| <ul style="list-style-type: none"> ➤ Business Administration ➤ Electrician ➤ HVAC ➤ Public Administration | <ul style="list-style-type: none"> ➤ Engineering ➤ Finance ➤ Fire ➤ Human Resources |
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Employees covered by a bargaining unit contract shall be regulated by the terms of the contract. Education reimbursement may be awarded, but is not guaranteed, for expenses associated with internships, practicums or apprenticeship courses as far as it does not adversely affect the City's operational effectiveness or annual budget.

City of Dunedin
Education Reimbursement Policy – Degree Seeking Program

Reimbursement for higher level degrees (e.g. Masters) will be considered on a case by case basis and as funds allow.

Changing Programs:

If the employee changes his/her degree program, or the current degree plan changes, a new Educational Reimbursement Application Form must be submitted for approval along with the new program plan. If approved, any credits that were reimbursed for the original program will be deducted from the new Degree program.

Reimbursement:

Reimbursement to employees for approved courses shall be limited to the cost of tuition*, any related lab fees, and a maximum of \$50 per book, per class (including sales tax), and will be subject to successful completion of the course work as described below. Book rentals are highly recommended. Employees may not sell any books submitted for reimbursement.

* Tuition reimbursement will not exceed the IRS annual maximum limit for educational expenses as a tax-free fringe benefit.

If all eligibility requirements have been met, the employee will be reimbursed for tuition, books and other eligible expenses based on the following schedule:

Grade Received	Percentage of Reimbursement
A, B, C	100%
P - Pass	100%

No reimbursement will be given for the cost of tuition, books, or fees if the employee receives a grade of "D", "F", Incomplete, Fail or Withdrawal in the course. No reimbursement will be given for any expenses related to auditing a course.

Procedures for Education Reimbursement

1. Complete the Educational Reimbursement Application Form.
2. Provide Form to immediate Supervisor along with the Learning/Degree Course Plan and acceptance letter for initial approval.
3. If supervisor approves, paperwork is sent to Division and/or Department Director for signature through the employee's immediate supervisor, for final department approval.
4. Signed Application form, acceptance letter, and the Education Learning/Degree Plan are forwarded to Human Resources for review and final approval.
5. Once approved by the Director of HR & Risk Management and the City Manager, Human Resources will return a signed copy of the Educational Reimbursement Application Form to the employee and department. If the application is denied,

City of Dunedin
Education Reimbursement Policy – Degree Seeking Program

- the employee and department will be notified of the reason(s) for denial in writing.
6. As approved courses are completed each semester/quarter, the employee will submit the Request for Educational Reimbursement Form, along with official verification of the grade received from the educational institution, and the paid receipt(s) for tuition, book(s) and other fees to Human Resources within thirty (30) calendar days of completing the approved course(s). Exceptions to this deadline will be determined by the Human Resources Department.
 7. Upon receipt of the above documentation, Human Resources will initiate the paperwork necessary to process the reimbursement payment to the employee.
 8. All tuition reimbursement payments shall be processed through payroll and handled in the same manner as the employee's salary.

Appeal Procedure:

An employee may appeal any eligibility decision or program disapproval with the Director of Human Resources & Risk Management. The appeal must be in writing and submitted to the Human Resources Director within ten (10) calendar days of the date the employee was sent the decision.

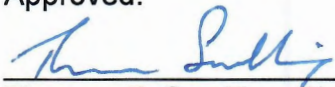
Tuition Buy-Back Program:

If the employee voluntarily terminates employment or is terminated for cause within two (2) years of receiving tuition reimbursement, the employee will be obligated to repay the amount of the reimbursement in proportion to the time remaining in the applicable two-year "buy back" period. Repayment may be made directly to the City or by having the amount deducted from their final paycheck or any leave pay-out. The lay-off of an employee through no fault of the employee exempts them from the "tuition buy-back" requirement.


City Management reserves the right to make additions, deletions or modifications at its discretion, and can do so at any given time. Any changes made by the City of Dunedin to this policy will apply immediately to all individuals employed at the time such changes become effective unless otherwise advised.

Effective Date of Policy: October 1, 2023

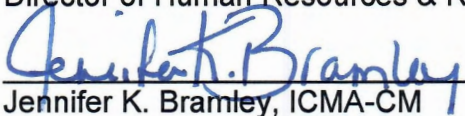
Approved:



Theresa E. Smalling, PhD, SPHR
Director of Human Resources & Risk Management



Date



Jennifer K. Bramley, ICMA-CM
City Manager



Date