

**TOWN OF DAVIE
HUMAN RESOURCES DEPARTMENT**



**TUITION REIMBURSEMENT
SOP #23-012**

May 18, 2016

SUMMARY OF REVISED, DELETED, OR ADDED MATERIAL

This operating procedure shall replace the Personnel Rules and Regulations and Policies enacted prior to the effective date of this Operating Procedure.

Revision	Date	Responsible Department	Description of Change
1	October 4, 2007	Human Resources	Initial Release
2	September 19, 2012	Human Resources	Revision
3	May 18, 2016	Human Resources	Revision

APPROVALS:



Human Resources Director/Grace Garagazzo

2/5/19

Date



Town Administrator/Richard J. Lemack

2/7/19

Date

1 -1. POLICY.

Tuition Reimbursement is a benefit that encourages employees to pursue higher education in an effort to enhance knowledge and skills thus improving potential for future opportunities.

For employees governed by collective bargaining agreements or individual employment agreements, the language of the agreement supersedes the provisions of this policy.

1-2. SCOPE.

Full-time employees that have completed their initial probationary period with the Town are eligible for tuition reimbursement, promotional probationary employees shall not be affected. College courses must be related to the needs of the Town and have the potential to improve performance in the employee's current position or future assignments with the Town. Reimbursement is subject to provisions within Collective Bargaining Agreements and/or budget funding.

In all cases, the Town Administrator or designee will, in his or her sole discretion, determine if the course is beneficial to the Town and, therefore, if educational expenses for such course(s) may potentially be eligible for reimbursement, with the exception that the Town Council will determine if courses taken by the Town Administrator are beneficial to the Town and if educational expenses for such courses are to be reimbursed.

1-3. GUIDELINES.

- a. Eligible employees that obtain prior approval are entitled to receive reimbursement for a college or university program that totals eighty percent (80%) of the educational expenses paid, up to a maximum of \$3,500 per fiscal year for no more than two (2) courses per semester or quarter. Reimbursement of courses will be paid for tuition and associated fees (which include laboratory, matriculation and registration fees). Reimbursement will not be made on parking fees, cost of books, shipping fees for books or taxes on same.
 - b. Tuition Reimbursement shall be subject to the availability of funds for each benefit group on a first come, first serve basis. Should fund(s) be encumbered, requests may be placed on a wait list in order of arrival. Human Resources' receipt of a request shall not indicate that funding is available. If an employee is on a wait list, they will be notified should funds become available due to approved employees not completing the course(s) or receiving unsatisfactory course grades.
 - c. Employees that are receiving education subsidy or have been awarded grants [Florida Resident Access Grant (FRAG) and all others], scholarships, fellowships, or GI bill funds must reduce the requested amount of reimbursement by the amount of the subsidy.
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- d. Employees must receive a grade of “C” or higher, or if the course is presented on a “pass/fail” basis, the employee must receive a grade of “pass” to be eligible for reimbursement.
- e. The educational institution must be accredited by an accreditation agency recognized by the United States Department of Education.
- f. The Town Administrator or designee will require an employee who voluntarily resigns or who is dismissed, to reimburse the town for educational expenses if the employee has not completed two (2) years of paid continuous service after the course was completed.
- g. Employees are not permitted to study or use Town equipment for school work while on duty with the exception that Fire Department shift personnel may study during “after work hours/down time” between the hours of 5:00 PM and 7:00 AM.

1-4. PROCEDURE.

- a. Employees shall complete and send the Tuition Reimbursement Request form to their Department Director/Division Manager for approval.
 - b. If the Department Director/Division Manager feels the course meets the criteria for payment, he or she will submit the request to Human Resources for additional review and processing.
 - c. Human Resources will send completed applications with appropriate documentation for final review and approval to the Town Administrator.
 - d. Human Resources will be responsible for sending copies of completed forms to employees with the status of their request.
 - e. Employees are responsible for notifying Human Resources within seven (7) business days if they withdraw from a previously approved course or receive unsatisfactory grades. Human Resources will then refer to the ranking on the wait list to determine which employee would be eligible for reimbursement based on available funds.
 - f. Upon completion of the approved course(s), an employee shall send a copy of the final grade(s) and proof of payment of the course(s) to Human Resources for further processing within fifteen (15) business days.
 - g. Human Resources will send all required documentation to Budget & Finance for final processing.
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EXHIBIT A



**Town of Davie
 Tuition Reimbursement Request**

SOP #23-012

(Educational Institution must be accredited by an accreditation agency recognized by the United States Department of Education)

SECTION I: TO BE COMPLETED BY EMPLOYEE						
<input type="checkbox"/> Non-Represented <input type="checkbox"/> FOPA (General Employees) <input type="checkbox"/> FOP <input type="checkbox"/> IAFF <input type="checkbox"/> IAFF (Supervisory Unit)						
Name				Hire Date		
Department/Division			Job Title		Employee ID No.	
Name of College/University		Degree Program		Degree Level:		
				<input type="checkbox"/> Associate <input type="checkbox"/> Bachelors <input type="checkbox"/> Masters <input type="checkbox"/> Doctorate		
Course(s) Number	Credits	Title of Course(s)	Date of Course(s)		Tuition Cost per Course	Term
			Begin	End		
<input type="checkbox"/> Yes <input type="checkbox"/> No Have you requested tuition reimbursement this semester or fiscal year? If yes, list courses/dates: _____						
<input type="checkbox"/> Yes <input type="checkbox"/> No Have you been on an education subsidy or been awarded a grant/scholarship/ GI Bill? If yes, please list all awards and amounts: _____						
<input type="checkbox"/> Yes <input type="checkbox"/> No Course(s) prepare for a promotional opportunity?						
<input type="checkbox"/> Yes <input type="checkbox"/> No Course(s) help render better performance at the Town of Davie?						
Acknowledgement of Refund Terms:						
My signature certifies that I have read Policy No. 23-012 (Tuition Reimbursements), that I agree that reimbursement is contingent upon my abiding by it [EXCEPT WHERE RESPECTIVE COLLECTIVE BARGAINING AGREEMENT TERMS PREVAIL]; and I acknowledge the following guidelines:						
1. Town Administrator or designee shall have sole discretion over the approval of the request. Tuition reimbursement shall be subject to the availability of funds for each benefit group on a first come, first serve basis. If a request is received after it has been determined all available funds have been allotted, they will be placed on a wait list in order of arrival should funds become available at a later time (refer to the policy for wait list procedures). Human Resources' receipt of a request shall not indicate that funding is available.						
2. Applications submitted to Department Director/Division Manager shall include a course description(s) and proof of the net cost of credits at least fifteen (15) business days prior to the start of the course(s) or will be denied. Incomplete requests will be returned.						
3. Employees shall notify Human Resources within seven (7) business days if they withdraw from a previously approved course or receive unsatisfactory grades. If not, a future reimbursement request could be denied.						
4. Reimbursement shall only be made upon successful completion of the course(s) listed herein. Successful completion shall be defined by the Policy or applicable Collective Bargaining Unit. By or within 15 days of course completion, a final official grade along with the paid receipt (on official school stationery) shall be submitted to the Human Resources Department for processing.						
5. Pre-reimbursement: In the event of a voluntarily separation or if terminated for any reason, there shall be no obligation on the part of the Town to reimburse any part of the tuition. Post-reimbursement: voluntary separation or if terminated for any reason, requestor agrees to reimburse the Town directly or by way of deduction from last paycheck for any educational expenses if two (2) years of paid continuous service have not been completed.						
6. Any misrepresentation, omission of facts, and/or alteration of documents as a result of tuition reimbursement will null this request and/or approval and shall constitute sufficient cause for disciplinary action.						
Employee Signature					Date	

SECTION II: TO BE COMPLETED BY DEPARTMENT DIRECTOR/DIVISION MANAGER	
<input type="checkbox"/> Yes <input type="checkbox"/> No IF APPLICABLE , does department have budgeted funds to pay for this tuition reimbursement? If yes , list Department's GL/account number: _____	
<input type="checkbox"/> Yes <input type="checkbox"/> No Does Department Director/Division Manager approve request to be moved to next approval level? (MUST SUBMIT AS SOON AS POSSIBLE TO HUMAN RESOURCES DEPARTMENT.)	
If request is not approved by Department Director/Division Manager, please state reason: <input type="checkbox"/> Coursework does not prepare for a promotional opportunity. <input type="checkbox"/> Coursework does not help render better performance at the Town of Davie. <input type="checkbox"/> Department does not have budgeted funds to pay for this tuition reimbursement. <input type="checkbox"/> Other reason: _____	
Department Director/Division Manager's Signature	Date
SECTION III: TO BE COMPLETED BY HUMAN RESOURCES	
<input type="checkbox"/> Yes <input type="checkbox"/> No Did Human Resources receive a fully completed/approved Tuition Reimbursement Request? <input type="checkbox"/> Yes <input type="checkbox"/> No Did Human Resources receive Tuition Reimbursement Request on time? <input type="checkbox"/> Yes <input type="checkbox"/> No Did Human Resources receive the course(s) description(s) and registration? <input type="checkbox"/> Yes <input type="checkbox"/> No Has employee reached the maximum of \$3,500 per FY? <input type="checkbox"/> Yes <input type="checkbox"/> No Has employee passed one (1) year probation? (REGULAR STATUS REQUIRED ON DATE OF REQUEST.) <input type="checkbox"/> Yes <input type="checkbox"/> No Does Human Resources Director approve request to be moved to next level? <input type="checkbox"/> Yes <input type="checkbox"/> No Is funding available? <input type="checkbox"/> Yes <input type="checkbox"/> No Is the Educational Institution accredited by an accreditation agency recognized by the United States Department of Education? <input type="checkbox"/> Yes <input type="checkbox"/> No Correct GL/Account No. listed above? If no, _____	
Eligible amount of reimbursement per Policy/CBA (i.e. 80%/100%): _____	
Comments: _____ <input type="checkbox"/> Approved for Wait List - Wait List Rank#: _____ (DOES NOT APPLY TO IAFF). Funding has already been allotted on a first come, first serve basis. This reimbursement is now contingent upon funds becoming available due to incomplete coursework or unsatisfactory course grade. Therefore, this does not guarantee payment/reimbursement.	
If request is not approved by Human Resources Director, please check all boxes that apply: <input type="checkbox"/> Incomplete form/Missing documents: _____ <input type="checkbox"/> Request not received on time or was submitted after course started. <input type="checkbox"/> Employee has reached the maximum of \$3,500 per FY. <input type="checkbox"/> Employee is not Full-Time and/or has not passed initial probationary period (promotional probationary shall not be affected). <input type="checkbox"/> Comments: _____	
Human Resources Director's Signature	Date
SECTION V: TO BE COMPLETED BY TOWN ADMINISTRATOR OR DESIGNEE	
<input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Comments: _____	
Town Administrator's Signature	Date
SECTION VI: FOR HR USE ONLY (POST-COURSEWORK)	
<input type="checkbox"/> Yes <input type="checkbox"/> No Proof of payment attached?	<input type="checkbox"/> Yes <input type="checkbox"/> No Proof of grade attached? Final Grade: _____
<input type="checkbox"/> Yes <input type="checkbox"/> No Approved for payment?	Approved Amount: _____
Human Resources Director's Signature	Date
SECTION VII: FOR PURCHASING USE ONLY (POST-COURSEWORK)	
<input type="checkbox"/> Yes <input type="checkbox"/> No Correct GL/Account No.	Final Grade: _____
Notes: _____	
Purchasing Division's Signature	Date