Tuition Assistance Policy

Policy Number: PP 7-2
Effective Date: July 01, 2017
Approved By: Roger L. Stancil, Town Manager

POLICY	A Department Head may approve tuition assistance in the form of reimbursement to any regular full and part time employees who have completed their probationary period. An employee can be reimbursed up to the annual limit for successfully completing coursework that is directly related to an employee's current position, or for classes that prepare employees for promotions or transfers to other positions with the Town. Employees who are on paid educational leave to attend classes are not eligible for this assistance. Funds are limited and provided on a first-come, first serve basis.
PURPOSE	Improving the skills of Town employees directly impacts job satisfaction, improves employee retention, and enhances the Town's Professionalism in service delivery to the public. The Director of Human Resource Development is authorized to issue procedures consistent with this policy.
R.E.S.P.E.C.T. VALUES	**Professionalism:** We are committed to the excellence and accountability of our own performance as well as the performance of the organization. We carry out our jobs efficiently and effectively, are open to feedback about our performance and show a willingness to learn.
APPROVAL	Roger L. Stancil, Town Manager

PROCEDURES

These procedures are issued by the Director of Human Resource Development to implement the Tuition Assistance Policy, PP 7-2, issued by the Chapel Hill Town Manager. These procedures may be periodically updated.

A Prior Approval:

1. Submit Form to Department Head: Employees should fill out FORM 7-2 A Tuition Assistance Application Form and submit it to the Department Head for approval.   **Employees are strongly encouraged to seek prior approval for tuition assistance before taking any classes**. Classes taken without prior consultation with the Department Head may not qualify 1for tuition assistance.

B. Assistance Subject to Availability of Funds:

Tuition assistance is not guaranteed, but rather, is subject to the availability of departmental funds. Again, **employees are strongly encouraged to seek prior approval** for tuition assistance before taking any classes.

C. Eligible Employees:

All regular full-and part-time employees who have successfully completed their probationary period are eligible for tuition assistance via reimbursement up to the annual limit.

1. Employees on Paid Educational Leave: Employees who are on paid educational leave for the time during which they are attending classes are not eligible for tuition assistance.

D. Eligible Courses:

1. Related to Town Work: An eligible course is one which will either improve the employee's ability to perform the present job or help prepare them for a job within the Town which requires a higher or different level of responsibility or skill.   Please see the Frequently Asked Questions for an expanded discussion about the types of courses that might be eligible for tuition assistance.

2. Offered by Accredited School: Courses must be offered by a college, university, community college, or other school or training academy accredited through recognized agencies.

1. Eligible Expenses: Some examples of eligible expenses are: a) Tuition b) Registration fees   c) Laboratory fees d) Student Fees D.

2. Non-eligible Expenses: Some examples of non-eligible expenses include: a) Books b) Special Equipment c) Tools d) Supplies such as pencils and paper e) Travel

PROCEDURES CONT.	**E. Amount of Assistance:** Any assistance is subject to the availability of funds. 1. Full Time Employees: Employees classified as regular, full-time employees are eligible for up to $500.00 in tuition reimbursement each fiscal year, for courses that are completed in that fiscal year. 2. Part-time Employees: Employees classified as regular, part-time employees are eligible for up to $250.00 in tuition reimbursement each fiscal year for courses that are completed in the fiscal year. **F. Grade Requirements:** 1. Undergraduate Courses: Employees must complete and pass the course with a grade of A, B, or C 2. Graduate Courses: Employees must pass the course with a grade of A or B. 3. Courses with Non-traditional Grading: Employees must pass the course with a rating of Pass, High, Satisfactory, or Credit by Examination. 4. Courses with no Grade Provided: Employees must provide a written statement from the instructor certifying successful course completion. **G: Reimbursement Procedures:** 1. Deadline: the deadline for submitting a request for tuition reimbursement is June 1 of the fiscal year in which the course will be completed. Applications for reimbursement received after this deadline will not be accepted. 2. Classes that Span more than One Fiscal Year: If a course begins in one fiscal year, but ends in another, then reimbursement will be made from funds from the fiscal year in which the course ends. 3. Forms and Receipts: Employees should submit the completed *FORM 7-2 A Tuition Assistance Application Form* to their Department Head. Please attach receipts and a transcript or other approved documentation verifying grades or course completion. 4. Department Heads to Submit for Reimbursement: Upon receipt of all documentation, the Department Head will confirm that the reimbursement is approved and will submit *FORM 72 B Requisition Form for Tuition Assistance Check* to **Business Management** to authorize a check to the employee. 5. Employees who Switch Departments prior to Completing their Coursework: If an employee receives pre-approval for tuition assistance and then switches departments during the fiscal year, then the department that originally approved the request is responsible for paying the tuition assistance for the employee, unless the Department Heads agree otherwise. Information should be submitted to the Department Head who originally approved the request, and to the Department Head who will process the payment.

PROCEDURES CONT.	6. <u>Employees Who Leave Town Employment:</u> a) <u>Prior to Completing the Class:</u> An employee who is pre-approved for tuition assistance but leaves Town employ prior to completing the class request forfeits any rights to the tuition assistance payment. b) <u>After Course Completion, but within Six Months of Course Completion:</u> an employee who receives tuition assistance but leave town employment within six months of completing the class may be required to reimburse the Town for the tuition assistance.
FORMS/INSTRUCTIONS	FORM 7-2 A Tuition Assistance Application Form Tuition Reimbursement Check Requisition—available from BMD.
PROCEDURES APPROVED BY	Cliff Turner, Human Resources Development Director
ADDITIONAL CONTACTS	Human Resource Development 919-968-2700 or mailto:Ombuds@townofchapelhill.org Ombuds office 919-265-0806 or mailto:Ombuds@townofchapelhill.org
DEFINITIONS	None.
RESPONSIBILITIES	**All Employees are expected to:** a) Seek prior approval for tuition assistance b) Request assistance only for qualifying coursework **All Department Heads are expected to:** a) Review and approve or deny tuition assistance requests b) Seek assistance from HRD if they are unsure about any part of the process c) Provide tuition assistance funds in their budgets when possible d) Promptly process check requisition requests after employee submits all required documentation

RESPONSIBILITIES CONT.	**All Human Resource Development staff members are expected to:** a) Assist employees in understanding and complying with the policy b) Help resolve disputes regarding the policy **Business Management is expected to:** a) Promptly issue tuition reimbursement check requests.
SCOPE	This policy applies to all regular full and part time employees, subject to available funds.
POLICY HISTORY	Updated September 2001 Revised and Reissued July 1, 2017 This policy replaces and supersedes any previous Town policies, departmental policies, handbooks, or unwritten policies or practices covering the same subject. Departmental policies in compliance with this policy are referenced in Section XI **Related Information**. In the event of any disparity between this policy and the Town's Code of Ordinances and/or applicable local, state, or federal laws, the Town's Ordinance and/or applicable laws shall prevail.

FORM 7-2 A   Tuition Assistance Application Form

Application Date: [ ]   Department: [ ]

Last Name [ ]   First Name: [ ]

Hire Date: [ ]   Emp ID #: [ ]

Status: Job Title [ ]   Full Time ☐   Part-Time ☐

Work Phone: [ ]

Purpose: Improved Job Skills ☐ Credit only ☐ Certificate ☐ Degree ☐

Name of School or University: [ ]

Explain how this course(s) will assist you in your career goals:

[ ]

Course Title	Credits or Hours	Class Start Date	Class End Date	Costs *
1.				
2.				
3.				
Total				

- *Costs include registration, lab fees, books, and other similar expenses*

I understand that if my application and course reimbursement is approved, the Town will reimburse the allowable costs up to the maximum amounts allowed per fiscal year (July 1-June 30) as stated in the Tuition Assistance Program policy. I agree that in order to be reimbursed at the end of the course I must obtain a passing grade in accordance with the policy and submit a copy of my grades and receipt for payment. Additionally, I also understand that should I leave the Town's employment within six months of being reimbursed for the above course(s), I must repay the Town the amount of the reimbursement.

Applicant's Signature: _____   Date: _____

Department Head Approval: _____   Date: