

**I. PURPOSE**

To define the City's policy regarding educational assistance.

**II. POLICY**

It is the policy of the City of Visalia to encourage employees to continue their education whenever possible. Employees should take advantage of worthwhile educational opportunities to help improve job performance in their current job classifications as well as to prepare them for advancement or promotion within the City.

To help employees meet the costs of continued education, Department Heads may authorize an educational expense reimbursement for their employees meeting the City's requirements as explained in the following sections of this policy.

To assist employees and Department Heads in determining educational expense reimbursement eligibility, the following guidelines are applicable:

- A. Applicant Eligibility - Applicants must be regular full-time or regular part-time employees. This policy does not cover hourly employees.
  
- B. Reimbursement Amount - The City will provide up to \$800 per fiscal year per employee to help defray education expenses from accredited institutions. One half of this amount annually may be used for classes from other than accredited institutions, provided such programs or organizations are approved by the City. Approval for non-accredited programs must be obtained from the Department Head prior to registering for the session. Expenses for travel, room accommodations, or meals are not covered by this policy.

Approval for non-accredited classes will be based upon funding available. Due to budgeting time lines, an employee must declare his/her intention to use this money for the coming fiscal year by submitting a request in writing by February 15 of each year. This request must be submitted to the employee's Department Head. The employee's Department Head will determine eligibility, based upon available funds within the department.

- C. Other Financial Assistance - Any contribution applies to actual costs incurred by the employee over and above any financial assistance the employee receives from other student aid programs and/or scholarships.
- D. Educational Criteria - The criteria for course eligibility is broad. However, courses should be related to the employee's present job position or to the employee's potential career development within the City. The course may also be part of a program leading to a degree that relates to the employee's present position or potential for development. Courses should be offered through a college, university, adult education program, business or technical school, and/or a recognized correspondence school, and/or by qualified institutions or organizations, as determined by the Department Head. Class and study time should be scheduled outside the employee's normal work hours.
- E. Department Head Approval - The employee's Department Head shall determine eligibility. Department Head approval must be obtained prior to any course registration to make sure the employee's educational program meets requirements.
- F. Course Completion - A "C" grade or better or evidence of satisfactory course completion is required in order to receive a reimbursement of expenses.

**III. PROCEDURES**

The procedure for receiving financial assistance from the City of Visalia is outlined below:

- A. The employee shall submit an Application for Participation form (EAF-1) to his Department Head for review and approval **prior** to registering and/or beginning the class. The form shall include the course title, description and an explanation of the applicability to the employee's current duties and/or potential career advancements. Departments are responsible for tracking and monitoring such requests.

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- B.** The employee should request an educational cost refund within thirty (30) days of completing the approved course. To receive a reimbursement, the employee must submit Expense Reimbursement form (EAF-2) to his/her Department Head. The form must include receipts for tuition, supplies and books, etc., along with a verification of satisfactory course completion. After reviewing the request, the Department Head will forward a check request, along with the Request for Refund form (EAF-2) to the Finance Department for payment.
- C.** The Finance Department shall prepare and forward a check payable to the employee.
- D.** Payment of educational reimbursements will be charged to the department for which the employee works. The charge will be to the Educational Reimbursement Account (#3302).
- E.** A copy of any certificate or course completion may be forwarded to HRD for placement in the employee's personnel file if the employee so desires.
- F.** Assistance may be advanced to the employee, if necessary, with Department Head approval.