



# Education Assistance Program Guide

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## Administrative Procedures

*Effective: July 1, 2015*

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## FOREWORD

The City of Peoria offers an education assistance program to our full-time and part-time benefit eligible employees. Reimbursements for educational expenses as outline in the Personnel Administrative Regulations (PARs) and the Education Assistance Program Administrative Procedures qualify for exclusion from gross income up to the limitations of IRC Section 127.

These administrative procedures have been developed to act as a guide to administer the Education Assistance Program.

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Copies of the Education Assistance Plan document and the Education Assistance Program Administrative Procedures may be obtained from the Human Resources Intranet site.

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## Philosophy and Objectives

The City of Peoria values the benefits gained from professional development of our employees. We also recognize the importance of education in relationship to our on-going goal of increased innovation, continuous improvement and quality service to citizens.

In support of this value, the City offers an Education Assistance Program. The Education Assistance Program is designed to encourage employees to increase the knowledge, skills and abilities that prepare the City for sustained success. We believe this investment serves a critical need in supporting the short and long-term workforce planning needs of the organization.

The Education Assistance Program along with other professional development Programs are important components in preparing our employees for greater responsibility and the future challenges we face.

## Employee Eligibility

1. The Employee Assistance Program is available for full-time and part-time benefitted employees only.
2. Employees who are continuing their education by pursuing an associate's, bachelor's or master's degree are eligible for the Education Assistance Program offered by the City, if they satisfy all of the following criteria:
  - a. Successfully complete their initial 12-month probationary period as a City of Peoria employee
  - b. Maintain a satisfactory rating on their most recent performance appraisal
  - c. Actively pursuing a college degree that will prepare them for job opportunities in any existing City of Peoria position
3. A degree plan from an accredited academic institution must be on file with the Human Resources Department to be eligible for reimbursement.

## Course Eligibility

1. Employees must be pursuing a degree related to the business of the City of Peoria. The program of study must relate directly to an employee's current promotional career path, or an alternative established career path at the City of Peoria.
2. Courses must be included in the degree plan submitted during open enrollment.
3. The academic institution must be accredited and listed on the following website: <http://www.chea.org/search/default.asp>.
4. Academic credit hours must be earned for the course(s). Courses taken for a certification program are not eligible through the Education Assistance Program.
5. All courses of study and related coursework must be taken during off duty time unless otherwise approved by the Department Director. Department Directors may approve flexible schedules that allow employees to make up work-time at alternate hours within the same pay period based on the impact to the department operations.

## Ineligible Courses

1. Courses that fail to meet the minimum grade requirement of "C" or above or result in an incomplete grade are not eligible for reimbursement.
2. Courses for which the employee has received financial aid, scholarships, or grants that do not require re-payment. Employees using student loans that must be repaid are eligible for tuition assistance.
3. Course(s) previously taken that have already been reimbursed for under the City's Education Assistance Program.
4. Certificate programs are not eligible for the program.
5. CLEP examinations that do not meet the minimum passing requirements will not be eligible for reimbursement.

## **Education Assistance Program Funding**

On an annual basis, the City will establish a budget for the Education Assistance Program through its normal budget process. The funding will be part of the Human Resources base budget. The City may elect to adjust the funding for the Educational Assistance Program each fiscal year.

## Tuition Assistance Enrollment Process

To participate in the Tuition Assistance Program, you must first enroll. To enroll in the Tuition Assistance Program, you must:

1. Review the program guidelines and eligibility requirements.
2. Ensure your area of study aligns with your current career path or an alternate career path within the city.
3. Submit the following *prior* to beginning any courses in your program. Failure to submit an enrollment form prior to beginning courses may result in denial of your application.
  - a. Education Assistance Enrollment form (E1) (including promissory note).
  - b. Degree plan from the accredited college or university you will be attending.
4. Ensure all of the above documents contain all required signatures.
5. Submit entire application to Human Resources.

## Prior to Beginning a Course

You must enroll and be accepted into the program (see *Tuition Assistance Enrollment Process* section) before you can apply for course approval. Once your enrollment is approved for your degree program, you must submit an Education Assistance Course Application form (E2) prior to beginning a course. Failure to submit an enrollment form prior to beginning courses may result in denial of your application for reimbursement.

1. Ensure the requested course is clearly listed on your degree plan.
2. Submit completed, signed Education Assistance Course Application form (E2) listing the courses you will be requesting reimbursement for.

## After Completing a Course

Within 45 days from the last day of class, submit the following to Human Resources:

1. Completed, signed Education Assistance Reimbursement Request form (E3).
2. Official grade report listing the course name and final grade.
3. Official *itemized* receipt listing the course name, amount of tuition paid, and any other financial aid applied (grants, scholarships, discounts, etc.).

## Reimbursement Guidelines

- a. Tuition reimbursement will be made at 80% of the actual tuition rate until the tuition assistance budget is exhausted for the fiscal year.
- b. The City will not reimburse tuition for any course more than once.
- c. Costs incurred for College Level Examination Program (CLEP), Prior Learning Assessments (PLA) or other accredited equivalency testing that results in receipt of college credits will be reimbursed at 100% upon successful completion.
- d. Tuition reimbursement will not exceed the maximum fiscal year limit of \$5,000. This is a **tuition reimbursement program** only. The program applies only to actual tuition and/or equivalency testing fees to the extent such equivalency testing results in the acquisition of college credits that are necessary to the degree pursued **and** which credits would otherwise qualify for tuition reimbursement. All other fees such as lab, technology, registration, etc. charged by academic institutions are not reimbursable and expenses including but not limited to meals, lodging, transportation, parking, books, or other expenses indirectly or incidentally related to the educational activity are not subject to reimbursement.
- e. Reimbursement payments will be processed through the normal payroll cycle and may be subject to taxation in accordance with federal taxation regulations.
- f. Reimbursement requests must be submitted to Human Resources no later than 45 days after the last day of class. It is the employee's responsibility to check for their grade(s) on a daily or weekly basis. Reimbursement requests will include: (1) Completed E-3 Reimbursement Form; (2) invoice/statement from the school indicating course number/title, cost of course tuition for the course(s), any discounts/grants given; and (3) copy of course grade. Failure to submit all documentation within 45 days after the last class may result in denial of reimbursement.
- g. The fiscal year in which the course ends shall determine the year in which the course is eligible for tuition reimbursement.
- h. The resignation or termination of an employee prior to the completion of a course, regardless of reason, shall automatically terminate the eligibility for education assistance.

- i. Employees who experience a lay-off from employment will receive reimbursement only for those classes that were started prior to the date of the lay-off.
- j. Employees who leave the City prior to one year from the completion date of any course(s) taken may be required to repay the City for the course(s) reimbursed within the past twelve (12) months.
- k. An approved leave with pay or without pay does not affect eligibility for enrollment in the Education Assistance Program for courses that were started prior to the first day of leave. Courses started during a leave of absence are not eligible for reimbursement.
- l. Proof of degree completion must be reported to the Human Resources Training and Organizational Development Coordinator.
- m. Upon completion of your degree program, you may be required to prepare a presentation or report on your education to your department.
- n. The City of Peoria reserves the right to audit the employee's educational and financial records that may be contained in the employee's records held at the institution attended. Any right that the employee may have pursuant to the Family Education Rights and Privacy Act of 1974 or any similar acts are waived by acceptance of the tuition reimbursement.