




<b>SECTION: HUMAN RESOURCES</b>	<b>REFERENCE NUMBER: A11</b>
<b>SUBJECT: NON-MANDATORY TRAINING REIMBURSEMENT</b>	<b>EFFECTIVE DATE: 09/01/2018</b>
<b>FROM: KELLY KUENSTLER, CITY MANAGER</b> 	<b>LAST REVISION DATE: 08/5/2005</b>

A. **PURPOSE**

1. To enhance the educational and skill levels of City employees in order to increase the effectiveness of service to the public.
2. To establish uniform policies and procedures for the application, approval and disbursement of tuition reimbursement.

B. **RESPONSIBILITIES**

1. The employee is responsible for the following:
  - a. Selecting educational courses which meet their developmental goals.
  - b. Making sure that all courses taken under this program will be on the employee's **own time**; however, an employee may utilize flex-time with the approval of the Department Head.
  - c. Understanding that the attainment of a college degree or the completion of training, in no way obligates the City or the department to promote or give additional compensation to the employee.
  - d. Submitting to their Department Head a completed "Training Request Form" (**Attachment A**) for review prior to registration.
  - e. Submitting a copy of final course completion to the Department Head at the completion of the approved course.

- f. Acknowledging in writing (**Attachment B**), that if this program is utilized, the employee has a commitment to remain with the City for a period of Two years upon the completion of the course. Failure to fulfill this obligation will require that the employee reimburse the City for all costs which the City incurred for the course(s) during that year.
2. The Department Head is responsible for:
    - a. Reviewing all request for consistency and eligibility as established with this program and approving or disapproving requests for non-mandatory training reimbursement under the provisions of this Directive.
    - b. Maintaining the Department's training budget and making recommendations during the budget process to adjust the program for increases in the cost of education.
    - c. Administering the daily handling of the non-mandatory training ensuring requests are determined on a first-come-first-serve basis and the decision for who will be reimbursed for non-mandatory training is done in a fair manner.
    - d. Ensure that there is available funding for the cost of the course.
  3. The City Manager is responsible for reviewing appeals regarding training reimbursement matters submitted by employees. City Manager decision is final and not appealable.

C. **ELIGIBILITY**

1. All full-time, regular employees are eligible to receive non-mandatory training reimbursement upon the completion of their probationary period with the City. This provision does not apply to employees who are promoted or transferred to another position within the City. If a regular employee is placed on probation either because of unsatisfactory job performance or disciplinary action, their participation in this program will be suspended until such time that they are no longer on probation. If an employee is placed on probation in the middle of a training session and they have requested assistance under this program, they will not be eligible to receive reimbursement when the course is completed.
2. The City will participate in the cost for training which are:
  - a. Related to the duties of the position held by the employee.



- b. Relevant to the employee's professional growth, in current career field (i.e. Patrol Officer may take a leadership course to assist in promoting to corporal).

D. **PROCEDURES**

1. This policy applies to those employees who seek additional training, other than what is typically offered by the Department. non -mandatory training sessions applies when:
  - a. Attendance is outside of the employee's regular working hours.
  - b. Attendance is voluntary.
  - c. The training is directly related to the employee's job (but is not mandatory).
2. The employee must complete a request form (**Attachment A**) and a Letter of Agreement (**Attachment B**). These completed forms and any receipts or attachments will be submitted to his/her Department Head.
3. The Department Head will approve or deny the request and provide explanation for their actions, within 5 business days (**Attachment A**).
4. If the reimbursement request is disapproved, the employee will have the option of appealing the decision in writing to the City Manager.
5. Both Attachment A and B will be forward to the Human Resources Office to be maintained with the employees personnel file.
6. Upon an appeal, the City Manager will review the situation and make a decision on whether to allow or disallow the request for reimbursement. The decision of the City Manager is final.
7. In order for an employee to be eligible for reimbursement, a copy of a certificate of completion must be provided to the Department Head. All non-mandatory training is done on a reimbursement system. If the employee is requesting the City to pay for the curse up front, the employee must make a request in writing to the City Manager. The City Manager may approve the upfront payment of the registration fee.
8. All training requests are subject to the parameters of the City Budget. It is overall the Department Heads responsibility to manage their training budget and request appropriate funding each Fiscal Year.

G. **ATTACHMENTS**

- A - Tuition Reimbursement Request
- B - Letter of Agreement

**REIMBURSEMENT REQUEST**

TYPE OF COURSE OR PROGRAM (Please check one)

\_\_\_\_\_ Job Related Course      \_\_\_\_\_ Certification/Technical Training  
\_\_\_\_\_ Applicable Job Related College Course

\_\_\_\_\_  
NAME

\_\_\_\_\_  
POSITION

\_\_\_\_\_  
DEPARTMENT

EMPLOYMENT DATE: \_\_\_\_\_

BRIEF DESCRIPTION OF CAREER PATH BEING FOLLOWED BY EMPLOYEE IN SEEKING MORE EDUCATION:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**COURSE INFORMATION:**

\_\_\_\_\_  
COURSE NAME

\_\_\_\_\_  
INSTITUTION NAME

COURSE DESCRIPTION: (Attach online description, brochure)

DURATION OF TRAINING: START DATE \_\_\_\_\_ END DATE \_\_\_\_\_

COST OF THE REGISTRATION FEE: \_\_\_\_\_

RECEIPT ATTACHED YES  NO

**THE FOLLOWING STATEMENT MUST BE SIGNED BY THE EMPLOYEE.**

I understand that reimbursement of the course will be made only if the above course(s) or program(s) are approved by the City. Upon successful completion of the course(s) or program(s), I understand that it is my responsibility to file a copy of completion certificate to receive reimbursement. No reimbursement will be due if my employment terminates before completion of the course(s) or if I make a C or lower in a college course or if this course has been taken and reimbursed by the City. I will follow all rules set out by PD A11.

\_\_\_\_\_  
EMPLOYEE SIGNATURE

\_\_\_\_\_  
DATE

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**Department Head Only**

\_\_\_ Approve \_\_\_ Denied

Explanation of Decision Made: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The Couse will be paid out of the Following Account: \_\_\_\_\_  
Account Balance: \_\_\_\_\_

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Received by HR \_\_\_\_\_  
Date

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**Finance**

\_\_\_ Approve \_\_\_ Denied

\_\_\_\_\_  
Signature Date

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**ATTACHMENT B**

**LETTER OF AGREEMENT**

Course Title \_\_\_\_\_

Amount Paid \_\_\_\_\_

I, \_\_\_\_\_, do hereby request the City of Leon Valley to pay for additional training/course work relating to my duties as an employee with the City of Leon Valley. The expected completion date of the course for which reimbursement is requested is \_\_\_\_\_ . I understand that the City will provide this reimbursement of eligible educational expenses because the taxpayers will derive a benefit from this training and the intent of this policy to ensure that I fulfill a **two-year** commitment which will end two years after the course completion date. I understand that if I am unable to fulfill my two years I will be responsible for paying the amount requested in full. I also understand that this amount can be withheld from my last check.

I further understand that if I am placed on probation at any time during the course due to unsatisfactory job performance or disciplinary action, that my participation in this program will be suspended until such time that I am no longer on probation. If this occurs, I understand that I will be ineligible to receive reimbursement for any course(s) taken during the semester even though the courses were previously approved.

**I DO / DO NOT** (circle one) want to receive from the City an amount of money equal to the cost of the reimbursement I am eligible for under this program. I understand that an amount of personal or annual leave equal to the amount of money disbursed will be encumbered by the City until the successful completion of the course. I also authorize the City to make a payroll deduction in accordance with established policies/procedures if I fail to complete the course or do not receive a passing grade or in any other manner do not meet the requirements of the training reimbursement directive A11.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Department Head

\_\_\_\_\_  
Date