

Section Name: Employee Relations
Section Number: 400
Policy Number: 447

Effective Date: September 10, 2002
Date of Revision: September 20, 2022

Subject: Educational Reimbursement

Overview:

The County recognizes the skills and knowledge of its employees are critical to the success of the organization and enhancing services to the community. Educational reimbursement encourages personal employee development through formal education so that employees can maintain and improve job-related skills or enhance their ability to compete for reasonably attainable jobs within the County.

Purpose:

To establish policies and procedures for educational reimbursement to employees of the County of Monroe.

Scope:

This policy applies to all departments, co-employer, elected offices, and administrative units of the Monroe County Government.

Statement of Policy:

- A. The County of Monroe determines it valuable to promote from within as an incentive for employee retention and continuous improvement and development of employee skills. The County is dedicated to investing in workforce skills and education to meet the mission of the County and to prepare employees for opportunities to grow and promote within the County government.
- B. The policy is also a tool to recruit and attract employees to the organization and demonstrate a commitment to the value of a skilled, educated and trained workforce. The outcome of this approach and investment in employees is intended to enhance services to the community in efficient and effective operation across all offices and departments.
- C. To be eligible for educational reimbursement, an employee must be employed in a regular full-time position and have completed at least one (1) year of continuous service with the County. Employees on medical or administrative leave are not eligible.
- D. Eligible employees may be reimbursed for the following qualifying expenses:
 - 1. Course of study pre-approved by the County upon determination the course of study is directly related to the employee's present job or will enhance the employee's potential for advancement to a position within the County and the individual has a reasonable expectation of advancing to.
 - 2. Books and workbooks for either the cost of purchase or rental fee to rent books

- for course study.
 3. Lab fees and expenses related to the educational institution's approved fee schedule.
 4. Registration fees assessed by the educational institution for the enrolled coursework.
 5. Travel, meals or other incidental expenses not specifically outlined in 1-4 are not eligible costs for reimbursement from the County.
 6. In addition, to qualify for educational reimbursement, courses must be taken at an accredited institution.
- E. Employees seeking educational reimbursement must obtain approval from the County Administrator/Chief Financial Officer before enrollment in any class or program (**Employee Education Reimbursement Application**). Such approval will not be granted without a positive recommendation and supporting statement of the correlation to the employee's employment with the County by the employee's supervisor. Supervisors must identify, obtain funding or develop a plan for reimbursement before making a positive recommendation.
- F. The County Administrator/Chief Financial Officer in consultation with the Human Resources Director will consider the following factors in evaluating requests for educational reimbursement:
1. The nature and purpose of the course of study
 2. The benefits to be derived by the employee and the County
 3. The employee's level of responsibility and length of service
 4. The estimated cost including a review and proposal statement by the department head/supervisor outlining the resources to fund the estimated cost of educational reimbursement; and
 5. In addition, to qualify for educational reimbursement, courses must be taken at an accredited institution with classes taken in-person or on-line through virtual classrooms.
- G. Employee reimbursement for eligible educational reimbursement will be based upon the grade received for the course, as follows:
1. For a grade of "A", 100% of reimbursable costs
 2. For a grade of "B", 75% of reimbursable costs
 3. For a grade of "C", 50% of reimbursable costs
- H. Employees seeking reimbursement for educational expenses must submit to the Human Resources Director an **Employee Education Reimbursement Request for Payment Form**, a transcript of their grades, and receipts for the expenses incurred within sixty (60) days after completion of the course(s). The County will then reimburse the employee the applicable percentage of the cost of tuition, textbooks, workbooks, registration fees, and lab fees, based on Section G above. All supporting documents must be submitted with the request for payment However, employees who take courses

at the specific request or direction of their supervisor may be reimbursed for all costs in advance.

- I. Employees who, prior to completing an approved course, voluntarily leave the County or are terminated will not be reimbursed for the expenses associated with the course/program. Employees seeking reimbursement for educational expenses must agree in writing to repay the County in full if they leave the County voluntarily or are terminated within three (3) years from the date of reimbursement.
- J. Employees are expected under normal circumstances to schedule class attendance and the completion of study assignments outside of their regular working hours. If this is not possible, the employee and department head shall develop an alternative or flexible work schedule to the extent possible while not impacting service to the public. Employees may also use available paid leave time or may request unpaid leave to attend class instruction. Further, employees may use County owned computer equipment and connectivity to conduct online classes subject to the approved schedule of the department head.
- K. The Human Resources Department will maintain all records of the educational programs completed by each employee.

Definitions:

- A. Employee: An individual who is employed full-time by the County of Monroe in the course of the County's mission and public service of local county government.

Policy Compliance:

- A. Conduct as Students. Employees shall conduct themselves at all times so as to reflect the standards of Monroe County Government. The County of Monroe is paying for students' education and the student should obtain the maximum amount of training and education so as to improve and maximize services provided by the County of Monroe.
- B. Exceptions. In cases of unusual circumstances or conditions, the County Administrator/CFO may waive a section or requirement of this policy in consultation with the employee/student, Department Official/Head and Human Resources Director.
- C. Responsibility:
 - 1. Employee: It is the responsibility of the employee comply with the policy and to complete all forms as instructed.
 - 2. Elected Officials/Judges/Department Heads or their designee(s): Complete the Department Recommendation section of the Employee Educational Reimbursement Application and to ensure compliance with this policy.

3. County Administrator/Chief Financial Officer: Final approval or denial of employees' requests and management of funds expensed for educational reimbursement.
4. Human Resources: The Human Resources Director shall have the responsibility for overseeing and implementing this policy under the guidance and direction of the County Administrator/Chief Financial Officer.

Administrative Procedure:

- A. Application. Employees will submit the **Employee Education Reimbursement Application** to their Department Head forty-five (45) calendar days prior to the registration deadline for class or program requested. The Department Head will submit the employee's request to the County Administrator/Chief Financial Officer in a timely manner but not less than twenty-five (25) days prior to the registration deadline. All supporting documents must be submitted with the application.
- B. Request for Reimbursement. Employees seeking reimbursement for educational expenses must submit to the Human Resources Director an **Employee Education Reimbursement Request for Payment Form**, a certified transcript of their grades and receipts for the expenses incurred within sixty (60) days after completion of the course(s). All supporting documents must be submitted with the request for payment.

Legislative History of Authority for Creation or Revision:

Adopted pursuant to action of the Monroe County Board of Commissioners, dated September 10, 2002.

Revised pursuant to action of the Monroe County Board of Commissioners, dated September 20, 2022.



EMPLOYEE EDUCATION REIMBURSEMENT APPLICATION

Employee Information:		School/Program Attending Information:	
Employee Last Name, First, MI	Department/Office	Name of School/Program	
Current Job Title	Date of FT Hire	Street Address	City, State, Zip
Email Address		Website	

Program Dates:	Type of Course:	Toward Degree of:
Start Date:	<input type="checkbox"/> In class	<input type="checkbox"/> Associate - Major:
Anticipated End Date:	<input type="checkbox"/> On-Line	<input type="checkbox"/> Bachelor - Major:
		<input type="checkbox"/> Masters - Major:
		<input type="checkbox"/> Other (non-degree Certificate):

Give a degree/program description and how it is related to your current position and/or future advancement opportunities(attach an official course/program description from the school's website):

Estimated total cost of tuition, books, lab fees, or other eligible costs (verification of tuition cost must be attached):

I, _____ wish to enroll in the above course/program. I have read the policy and procedure regarding education reimbursement and agree to the terms outlined. I understand that grades or other evidence of satisfactory completion must be provided.

Employee Signature: _____ Date: _____

I, _____, fully understand that I must continue employment with the County of Monroe for three (3) years after completion of the last course/courses taken. If my employment with the County of Monroe is terminated for any reason (voluntarily or otherwise), I will reimburse the County for all amounts expended.

Employee Signature: _____ Date: _____

Department Recommendation

_____ Approved _____ Not approved

Department Head/Supervisor Statement: Provide a statement on the position of the department in support or non-support of the employee's request for seeking educational reimbursement. Explain how the employee is positioned for advancement within the department or County and how the coursework/program will enhance the employee's skill set or education to strengthen the department's ability to deliver public services.

Funding Plan: Describe the department's plan or outline to be able to support the employee's education reimbursement including whether the expenses are an allowable cost under any funding formula the department receives funding to operate (include multiple years if applicable and account number(s) to be charged):

Department Head / Supervisor Name: _____

Department Head/ Supervisor Signature: _____ Date: _____

County Administrator/Chief Financial Officer Approval

_____ Approved _____ Not Approved

Comments: _____

County Administrator/Chief Financial Officer: _____ Date: _____

Account # to be charged: _____



EMPLOYEE EDUCATION REIMBURSEMENT REQUEST FOR PAYMENT

Employee Name:			
Employee Vendor #:			
Department:			
Approval Date of Education Reimbursement Application:			
Educational Institution Attending:			
Degree/ Certificate:			
Semester Requesting Reimbursement:			
Date Submitted:			

Course Title	Grade Received	Reimbursement %	Tuition Cost	Book/Fee Cost	Total Cost	Eligible Reimbursement
	A	100%	\$ -	\$ -	\$ -	\$ -
	B	75%	\$ -	\$ -	\$ -	\$ -
	C	50%	\$ -	\$ -	\$ -	\$ -

Course Title	Grade Received	Reimbursement %	Tuition Cost	Book/Fee Cost	Total Cost	Eligible Reimbursement
	A	100%	\$ -	\$ -	\$ -	\$ -
	B	75%	\$ -	\$ -	\$ -	\$ -
	C	50%	\$ -	\$ -	\$ -	\$ -

Request for Payment Amount \$ -

Request must include the following documents:

- Transcript Grades
- Verification of Tuition Payment
- Verification of Book/Fee Payment

In accordance with Policy #447, Educational Reimbursement, I certify that this statement of my costs is complete and accurate to the best of my knowledge.

Employee Signature: _____

Date: _____

CENTRAL OFFICE USE ONLY

Authorization of Payment:

Vendor # _____

Account # _____

Amount: _____

Memo: _____

Approved By: _____

Title: _____

Date: _____