

EDUCATION REIMBURSEMENT PROGRAM

1.0 Purpose

- 1.1 To define The City of Lake Forest Education Reimbursement Program and to set forth rules and procedures governing the program. Any applicable rules governed by collective bargaining agreements will apply to this policy.

2.0 Scope

- 2.1 The City of Lake Forest recognizes the direct correlation between formal education achievement and the level of employee performance. Therefore, to encourage employees to undertake academic work which contributes towards the attainment of a high degree of job proficiency, the City's Education Reimbursement Program is established to provide reimbursement for costs incurred while participating in education activities as deemed appropriate by the department head, Director of Human Resources **and City Manager**.

3.0 Action

- 3.1 Education Reimbursement Program. The Education Reimbursement Program provides for the reimbursement of costs incurred while involved in education activities. Upon approval of the Director of Human Resources and as long as budget funds are available, the City shall participate in education costs as defined herein under the following procedural guidelines and policies:
 - 3.1.1 Education: The City will reimburse the employee for a portion of tuition enrollment fees, lab costs, and books upon satisfactory completion of City-approved course work offered by an accredited university, college, junior college, business school, technical school and/or correspondence courses from the aforementioned educational institutions for which semester hours or equivalent credits are awarded. The hourly tuition rate is based on the average prevailing tuition rate charged by colleges and universities on an approved list of schools as issued by the Director of Human Resources. Provided funding is available, employees may receive up to an annually established amount based on the hourly tuition rates. This amount is based on the City's fiscal year. The department head may request an exception to the prevailing tuition rate in certain exceptional circumstances. Whether the exception is granted will be determined by the City Manager and will be based on availability of funding. (See Item 3.1.6(1) for specific requirements.)
 - 3.1.2 Employees Eligible: All regular, fulltime employees of The City of Lake Forest are eligible to **apply to** participate in the Education Program. The employee must have exhibited satisfactory job performance and must be off probation in order to be eligible. Those deemed eligible through department head **recommendation** and the City's succession plan **may be considered for the program**. Prior to the City granting any reimbursement, the employee must have taken full advantage of any eligibility for grants, veterans benefits, federal and/or state aid.
 - 3.1.4 Course Must Be Job Related: The education program must be relevant to the employee's job as determined by the City. The school course must be one that will improve the employee's efficiency, knowledge and competency in the performance of

his or her existing or projected duties with the City. Additionally, the course work should evidence specific, long-term benefits to both the employee and the City.

3.1.5 Salary and Wages: The employee shall not attend education courses during working hours, unless such attendance is approved by the City Manager. Employees will not be paid for hours in which they attend courses covered by this policy.

3.1.6 Satisfactory Education Course Completion: To be eligible for reimbursement of appropriate costs, the employee must furnish to the Director of Human Resources a completed reimbursement form approved by the department head with receipts and grades, provided by the educational institution, attached. The reimbursement level will be based on the following schedule:

Course Type	Grade	Amount
Undergraduate Courses	B or better (80%+)	100%
	C (70-79%)	75%
Graduate courses	B or better (80%+)	100%
	C (70-79%)	75%
Pass/Fail Courses	Pass	100%
	Fail	0%

- (1) In courses not issuing a grade, a certification from the instructor indicating the student satisfactorily participated in the activities of the course is required.
- (2) If the employee does not complete the course, reimbursement for tuition enrollment will not be given.
- (3) The amount of tuition reimbursement granted by the City will be offset by the amount of any scholarships or grants from any other source for which you are eligible with respect to the relevant course.

3.2 Training Programs

3.2.1 Regular Pay Rate to Apply: During working hours, if approved by the department head concerned, the employee may attend mandatory in-service courses, workshops and seminars. Employees shall not be paid overtime for these activities. Mandatory in-service training occurring outside of the employee's work schedule will be paid at overtime rates by May 1.

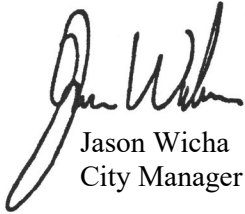
3.2.2 Transportation: The City shall incur no expense nor shall reimbursement be made to an employee for travel in conjunction with education and training courses, other than mandatory in-service training as established or approved by the Director of Human Resources.

3.2.3 Use of Municipal Vehicles for Transportation: Employees attending mandatory in-service training courses at locations outside The City of Lake Forest are authorized to use City vehicles when available and when approved by the Employee's department head.

- 3.2.4 Pooling Transportation Requirements: Employee transportation requirements will be pooled to minimize the number of City vehicles used. Travel by private automobile or public transportation will be held to a minimum and will only be authorized by the appropriate department head.
- 3.3 Education/Training Application Instruction.
- 3.3.1 Request to Participate in Education Reimbursement Program: Prior to budget submission (usually in **October** each year), an employee interested in participating in the Education Reimbursement Program must submit a written justification to the department head. This justification should detail how participation in the program will benefit the department, the City and the employee. If the department head agrees, the employee's justification and supporting department head justification will be attached to a Tuition Budget Form and forwarded to the Director of Human Resources. If funds are available in the budget, the request will be approved **for the amount requested by the employee** up to the annual maximum.
- 3.3.2 Application Forms for Individual Courses: Once approved for participation in the Education Reimbursement Program, individual course applications shall be submitted on a form available from the Director of Human Resources. In order to be eligible for reimbursement of appropriate costs, the application must be submitted in advance of the starting date of the course work. All applications must be submitted through the employee's department head. The Director of Human Resources shall review the applications.
- 3.3.3 Mandatory Courses. The Director of Human Resources' approval is not needed for registration of employees the department sends to mandatory schools or courses. However, the department head must assure that funds are available in the budget and has full discretion on the percentage of reimbursement for mandatory courses.
- 3.4 Employee's Commitment to City. Employees in degree programs shall recognize the City's commitment to granting and funding the degree. In consideration for approving a graduate-level degree program request, the employee will agree to a minimum three (3)-year commitment to continued employment with the City following completion of the program. A bachelor degree will require a two (2)-year commitment to continued employment with the City following completion of the program; an associate degree, a one (1)-year commitment from the employee to continued employment with the City following completion of the program.
- 3.4.1 In the event that the employee voluntarily leaves the City (i.e., resignation, retirement, etc.) **following** completion of a program, the employee shall reimburse the City a prorated portion of 100% of the total course expenses paid by the City (e.g., if an employee received a graduate-level degree and resigns after 2 years following completion of the program, the employee must reimburse the City 1/3 of the total course expenses paid by the City).
- 3.4.2 In the event that the employee voluntarily leaves the City **while still completing** the degree program, the employee shall reimburse the City the total course expenses paid by the City to date.
- 3.4.3 No reimbursement will be required if the City terminates the employee or it is otherwise agreed upon by the City.

4.0 Distribution

4.1 Available on the HR website: www.citylf.org.



Jason Wicha
City Manager

Rev. 5/91, 5/96, 5/97, 5/00, 5/05, 5/08, 5/14, 5/19