

## **INSTRUCTIONS FOR TUITION REIMBURSEMENT APPLICATION**

1. Fill out application form. Include (1) a one page essay with the application explaining how the City of Moberly will benefit by furthering your education and how it relates to your job at this time, (2) a career profile of all intended classes and the degree being sought, and (3) the assessment worksheet.
2. Submit all paperwork in duplicate to your supervisor at least 45 days prior to the beginning of the school semester/trimester.
3. The Education Board meets quarterly to review applications received and make decisions for funding. Applicants will be notified by the Board chairperson of acceptance or denial.
4. If applicant is accepted, she/he must submit a letter requesting reimbursement along with proof of payment of all tuition and fees and certified record of final grades within 30 days of the completion of the semester/trimester. Failure to provide this documentation within this timeframe disqualifies the employee for one year from participating in the tuition reimbursement program.
5. For further information, please refer to the Education Policy in the City of Moberly Personnel Manual.

**CITY OF MOBERLY TUITION REIMBURSEMENT PROGRAM APPLICATION**

Prepare in duplicate and submit to your immediate supervisor. Once the application has been reviewed by the Education Board, a duplicate copy will be returned to you after approval or denial has been determined. Within 30 days of completion of course(s), a letter requesting reimbursement along with (1) proof of payment of tuition and fees and (2) certification of passing grades must be submitted to the Human Resources Department for reimbursement processing.

<u>Name (last, First, Initial)</u>		<u>Position</u>				<u>Department</u>
<u>Address</u>		<u>E-mail address</u>		<u>Telephone Ext.</u>		<u>Immediate Supervisor</u>
<u>Course Title</u>	<u>Subject</u>	<u>Credits</u>	<u>Class Meets</u>			<u>Estimated Tuition</u>
			<u>Days</u>	<u>Hours</u>	<u>Dates</u>	

School _____	Total Tuition _____
Address _____	Registration Fee _____
Date Courses: Start _____ End _____	Books _____
Type of Degree _____ Major _____	Materials _____
Estimated Graduation Date _____	Total _____

Will you receive training allowances for this coursework from another source (scholarship, fellowship, etc)? No  Yes   
 (If yes, explain) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Please submit with application a career profile of intended study, the assessment worksheet, and a one page essay explaining (1) how the City will benefit from your education program and (2) your long term goals as related to your employment with the City of Moberly.**

Applicant signature \_\_\_\_\_ Date \_\_\_\_\_

----- **Make no marks below this line** -----

**SUPERVISOR'S EVALUATION**

- I recommend this application for approval.
- I do not recommend this application for approval.

Supervisor signature \_\_\_\_\_ Date \_\_\_\_\_

**HUMAN RESOURCES DEPARTMENT**

- I recommend this application for approval.
- I do not recommend this application for approval.

Human Resources Director signature \_\_\_\_\_ Date \_\_\_\_\_

**EDUCATION BOARD**

- Approved
- Disapproved

Board Chairperson signature \_\_\_\_\_ Date \_\_\_\_\_

## **EDUCATION POLICY**

An Education Board (hereafter “the Board”) shall be established and consist of a minimum of six (6) City employees selected at large from various City departments. The members of the Board are not entitled to any compensation for their services on the Board.

The Board shall supervise the operation of the tuition reimbursement program (hereafter, the “the program”). The purpose of the program is to encourage City of Moberly employees to undertake education programs to improve or maintain job performance, enhance potential for advancement as a result of identified career goals, and selectively augment personal and professional development.

The Board shall operate strictly within the operating budget approved by the City Council for that fiscal year. Each City department shall budget \$50 per full-time employee in the department per fiscal year. Maximum reimbursement per applicant to the program shall be limited to 80% of the “per credit hour” tuition rate paid by the employee, not to exceed \$200 per credit hour. Total annual reimbursement shall not exceed \$2,000 per employee, with a lifetime maximum of \$10,000. If any Board member(s) applies to the tuition reimbursement program, that Board member(s) will be excluded from the application review and reimbursement decisions.

The officers of the Board are Chair, Vice-Chair, and Secretary-Treasurer, who shall serve as such officers at the pleasure of the Board for one fiscal year (July 1 – June 30). Board officers shall be elected from the Board membership at the July meeting of each year.

The Chair is the chief executive officer of the Board and shall preside at all meetings of the Board. Unless another person is specifically authorized by vote of the Board, the Chair shall sign all contracts and other instruments to execute on behalf of the Board. He/she shall perform all the duties and have other powers as designated by the Board from time to time. The Chair shall vote on Board business only in the event of a tie.

The Vice-Chair shall perform the duties and have the powers of the Chair during the absence or disability of the Chair. He/she shall perform all the duties commonly incident to his/her office and shall perform other duties and have such other powers that the Board may from time to time designate.

The Secretary-Treasurer shall attend all meetings of the Board and act as secretary/clerk. He/she shall keep accurate records of all proceedings at meetings in a minute book to be kept for that purpose, which shall be open to the inspection of the City Council, City Manager, or any Board member. He/she may have the authority to cause copies to be made of all minutes and other records and documents of the Board. He/she shall perform all the duties commonly incident to his/her office and shall perform other duties and have other powers the Board may from time to time designate. In the absence of the Secretary-Treasurer from any meetings of the Board, a temporary secretary may be chosen to record the proceedings.

Regular meetings of the Board shall be held in July, October, January, and April of each fiscal year. Special meetings of the Board may be called by the Chair or, in his/her absence, the Vice-Chair. Any business of the Board may be considered and acted upon at any regular or special meeting. The following order of business shall be observed at all meetings of the Board: (a) Approval of the minutes of the preceding meeting; (b) Old Business; (c) New Business.

Any full-time employee of the City of Moberly who has completed at least one year of full-time employment or is a full-time rehire shall be eligible for participation in the tuition reimbursement program. An employee who leaves the employment of the City of Moberly within two (2) years following completion of a reimbursed course(s) will be required to reimburse the City for all reimbursements received in that two (2) year period. This reimbursement requirement shall not apply to employees whose employment is terminated without cause.

Reimbursement for all approved courses of undergraduate study will be at 100% reimbursement for "A's" and 80% reimbursement for "B's". Graduate studies will be reimbursed for "A's" only, also at 100%. For the purposes of this program for courses structured as "pass/fail", pass will be considered to be an "A" and fail will be an "F". Maximum reimbursement per applicant is limited to 80% of the "per credit hour" tuition rate paid by the employee, not to exceed \$200 per credit hour, provided that budgeted funds are available. This reimbursement will be paid only upon proof of payment of all applicable fees and proof from the educational institution of successful completion of each course. Total annual reimbursement shall not exceed \$2,000 per employee, with a lifetime maximum of \$10,000.

A Tuition Reimbursement Program Application must be submitted 45 days prior to the start of the semester/trimester/individual class(es). Courses provided outside an accredited educational institution, such as Dale Carnegie classes, City sponsored courses, etc., are not subject to this program but may be funded under the appropriate department's operating budget. Courses approved for reimbursement are:

1. Standard undergraduate and graduate credit courses offered by an accredited educational institution
2. Correspondence or extension courses offered by an accredited educational institution or accredited by the National Home Study Council or National University Extension Association
3. Non-standard undergraduate credit courses offered by an accredited institution
4. Special credit or credit-free courses provided by an accredited institution intended to satisfy the needs of job-related skills and continued professional development such as secretarial and vocational technical courses.

Within 30 days of the completion of proposed training course(s), the employee must submit proof of payment of all applicable fees and successful completion of each course in order to be reimbursed. Appropriate costs include tuition, registration, laboratory fees, and other fees for courses required for the selected course of study, but excludes fees for required expendable supplies such as pens, pencils, ledger books for accounting, drafting or architectural drawing paper, etc. Any change in the curriculum, along with a valid and verifiable explanation, must be submitted to the Board by the applicant for reconsideration of reimbursement by the Board.

The steps in making application to the tuition reimbursement program are:

- 1) Obtain a tuition reimbursement program application packet from the Human Resources Department (once per semester/trimester). The packet contains a tuition reimbursement program application and an assessment worksheet.

- 2) Submit two (2) copies of the completed packet to the employee's immediate supervisor at least 45 days prior to the start of the semester/trimester, along with:
  - a career profile (include all classes that the employee intends to take and what degree, if any, he/she seeks)
  - a one (1) page essay (one (1) time only, unless career profile has changed) explaining relationship of course(s) to company work, how the City will benefit from the education program, and long term goals as related to employment with the City of Moberly
  - the assessment worksheet.
- 3) The supervisor will review the application, approve or disapprove it, and forward it to the Human Resources Department.
- 4) The Human Resources Department will review the application and approve or disapprove it.
- 5) The Board Chair shall retrieve all pending applications prior to the Board meeting and prepare the Board assessment worksheet from information taken from the assessment worksheet completed by the applicant. Copies of the applications and the Board assessment worksheet shall be distributed to each Board member prior to the next scheduled meeting.
- 6) The Board shall review and approve or disapprove all applications brought before it. The Board Chair shall sign all applications either approved or disapproved, based on the Board's decision.
- 7) The Board Chair shall notify each applicant of the decision of the Board via the best available method as determined by the Board Chair and return all signed applications to the Human Resources Department.
- 8) When a course(s) is successfully completed, verification of this completion and receipts for all fees paid shall be submitted to the Human Resources Department within 30 days of completion to be eligible for reimbursement. Failure to provide this documentation within this timeframe disqualifies the employee from participating in the tuition reimbursement program for one year.
- 9) Human Resources will forward the documentation to the Finance Director for final verification of the documentation and preparation of the reimbursement payment.

An employee whose application is denied has the right to appeal the decision at a special Board meeting, with the time and place to be designated by the Board. In the event the Board does not reverse its position, the employee may make final appeal to the City Manager. The decision of the City Manager is final and binding.