



Tuition Reimbursement Program Procedure and Instructions

The Unified Government of Athens-Clarke County is committed to recruiting, hiring, and retaining the most suitable employees, while creating a more educated and productive work force. The TRP intends to serve the purposes of incentivizing and rewarding committed employees by making approved degree programs more affordable.

Eligibility:

All regular, full-time, active (40 hours per week) employees who have been employed with ACCUG for at least two consecutive years at the time of application and are enrolled in a relevant educational degree program that is job-related. Part-time, temporary, supplemental, and employees on leave of absence are not eligible to participate in the TRP.

Factors for Consideration of Applicant:

Applicants will be approved for the program if the HR Department finds- based on the materials submitted in the application and a review of all applicable factors- that approval will satisfy the purpose of the program.

Prior to enrollment:

1. Fully completed applications will be reviewed in the order received. Submit the TRP Application Form to Human Resources. Funding is limited each fiscal year. Completed TRP application & supporting documentation must be submitted to Human Resources two weeks prior to beginning of the semester for which you are applying.
2. Academic institution must be accredited through United States Department of Education and a regional accrediting organization recognized by the United States Department of Education (e.g., Southern Association of Colleges and Schools; Northwest Commission on Colleges and Universities).
3. Employee must demonstrate capability of continued employment with the organization (satisfactory PMP score from past year(s); good disciplinary record; supervisor and Department Director Recommendation).
4. Employee must meet length of service requirement with the organization. Minimum of two years of full-time creditable service is required by time of application. Probationary status employees will not be eligible for this benefit.
5. Employee must complete written statement in the designated area of the TRP Application (Form 1). This written statement will be reviewed for strength and relevancy regarding purpose, intentions, personal commitment and professional objectives supporting completion of the degree coursework.
6. Supervisor and Department Director must submit written statement supporting the



application of the employee. Areas for supervisor and Director statements are found within the TRP application Form (Form 1).

7. The relevancy of the degree to the job will be reviewed. Degree needs to relate to functions and responsibilities related to the employee's position as outlined in job descriptions, performance evaluation criteria, etc. Priority will be given to degree programs that address organizational and succession planning needs.
8. Other financial assistance being received by the applicant, aside from student loans, must be disclosed within TRP Application Form.
9. Classes should be scheduled so as to not interfere with normally scheduled working hours or shift assignments. Where this is not practical, employee must seek approval from their Director for any potential schedule accommodations (approvals must be in writing).
10. Employees must meet the residency requirement for in-state tuition. Employees not meeting in-state residency requirements will receive tuition equal to that of in-state tuition.
11. Previously approved employees who want to be considered for reimbursement for a subsequent semester must submit TRP Continuing Applicant Form (Form 2) to Human Resources. TRP Continuing Applicant Form & supporting documentation must be submitted to Human Resources two weeks prior to beginning of the semester for which you are applying.

After end of course(s)/semester:

1. If an employee is dropped from a class or withdraws from a class, the class will not be reimbursed by ACCUG. Also, the employee may not be eligible for tuition reimbursement for the subsequent semester- determinations will be made on a case-by-case basis.
2. A final grade of "B-" or higher is required in order to be reimbursed for a course. This grade should be reflected on an official transcript from the institution attended.
3. Official transcripts (indicating school, term, course(s) and grade(s)), invoice (indicating school and tuition amount), and receipt from institution must be submitted to Human Resources within 30 days from course completion date. These should be submitted along with **Request for Reimbursement Form (Form 3)**. Note that Invoice and receipt might be reflected within the same document- employee should check with school's Student Accounts unit.

Reimbursement:

80% of tuition. Maximum allocation for the year is **\$5000** per eligible employee. Selected



applicants will receive reimbursement within approximately 30 days after receipt of required documents provided all requirements are met.

Reimbursement will **not** be provided for the following:

- Books;
- Supplies;
- Lab fees;
- Parking;
- Or any other non-tuition expense.

Commitment of Service to ACCUG and Exceptions:

All employees that have been approved and receive reimbursement dollars through the TRP are expected to work for ACCUG for a period of no less than two consecutive years from date of last reimbursement. If this condition is not met, the employee will be required to pay ACCUG 100% of the assistance received during the two year period preceding the date of termination or retirement, in full, by the employee's termination date. Employee must sign affidavit acknowledging this condition after completion of semester in order to be reimbursed. The Unified Government of Athens-Clarke County reserves the right to pursue legal options to obtain repayment of the tuition assistance if necessary.

An employee who is terminated due to a reduction in force or elimination of the job, or who is involuntarily transferred within the Unified Government (conceivably making the degree irrelevant), will not be required to reimburse funds received under this program. Transfers will be evaluated on a case by case basis. If an employee is terminated due to a reduction in force, elimination of the job, or is transferred within the Unified Government during the academic semester (after pre-approval but prior to receiving reimbursement), the employee may still be eligible to be reimbursed for amount of costs incurred up to the date of termination or involuntary transfer.

If an employee's status changes to part-time during the academic semester, the employee will no longer be eligible for reimbursement. If an employee's status changes to part-time after being reimbursed, but prior to meeting time requirement of two years of consecutive and full-time employment, the employee must pay the Unified Government back the full reimbursement amount by effective date of status change.

If an employee is pre-approved for reimbursement, but is subsequently approved for leave of absence, the employee will no longer qualify for reimbursement that particular semester.

Ineligible Programs:

Employees will not be reimbursed for courses of study that are ineligible under the TRP. These ineligible programs, or courses of study, include academic courses in the following professional schools: dental, law, medical, pharmacy, veterinary, or comparable graduate school programs. Other ineligible programs, or courses of study, include: PhD Programs, workshops, seminars, continuing education courses, courses for certifications such as P.E. or C.P.A. certification, and related types of programs or classes. Support for these types of programs may be provided by departmental policies/budgets. The utilization of internal resources offered through ACCUG



Organizational Development Department is highly encouraged. Independent courses (not leading to a degree) will not be reimbursed.

Tuition Reimbursement Program Forms:

Form	Need to Submit...	Timeframe
TRP Application (<u>Form 1</u>)	...if applying for TRP for the first time. Also, former applicants that have been inactive for more than one semester (not counting Summer term) need to resubmit Form 1.	By January 1 st for spring semester, by August 1 st for fall semester, and two weeks prior to beginning of scheduled courses for summer term (Disregard for Spring 2016).
TRP Continuing Applicant (<u>Form 2</u>)	...if already submitted a Tuition Reimbursement Program Application (Form 1) and have been previously approved for reimbursement (applying for a subsequent semester).	By January 1 st for spring semester, by August 1 st for fall semester, and two weeks prior to beginning of scheduled courses for summer term.
TRP Post-Completion Reimbursement Request (<u>Form 3</u>)	...after completion of semester for which reimbursement was requested (if applicant was pre-approved).	Needs be submitted within 30 days of course completion, along with official transcripts, invoice, and receipt.

Scenarios:

Scenario 1

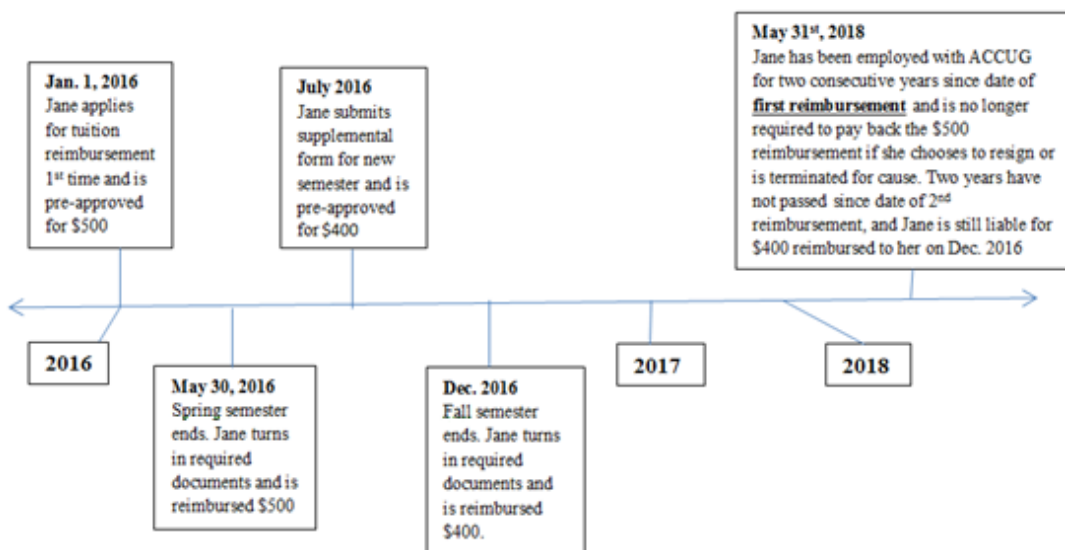
1. Jane is a full-time, active employee that has worked for more than 2 years in full-time capacity with the Unified Government. She is interested in enrolling in a degree program -from an accredited institution- that is relevant to her position within the Unified Government. In January 1, 2016, Jane gets ahold of a Tuition Reimbursement Application Form from Human Resources Department. She fills out the application, receiving approval from her direct supervisor and Department Director.
2. Jane submits the completed form to Human Resources in a timely manner (as outlined in this document). Human Resources reviews Jane application and decides to either pre-approve her for reimbursement or not based on a number of factors (outlined within this policy document) including relevancy of degree to Jane's job, the strength of Jane's purpose statement on her application, length of service, budgetary constraints, etc.
3. Jane receives a decision from HR prior to the beginning of the semester. Assuming HR pre-approves Jane for reimbursement, Jane completes her course(s) with a "B-" or above while remaining an active, full-time employee with the Unified Government. She sends HR the required documentation (official transcript, invoice, receipt of payment) within 30 days of completion along with TRP Form 3, sometime in May or June of 2016.
4. Human Resources approve Jane, who is reimbursed with a check for \$500 (requested through the application and reflected in her invoice and receipt) sometime in May or June, within 30 days after submission of TRP Form 3 and required documents.



Scenario 2

1. Jane goes through Scenario 1. In July 2016, Jane submits TRP Form 2 (Continuing Applicant Form) declaring courses she will take, to be considered for reimbursement for costs that will be incurred the upcoming semester. Jane requests \$400. The process occurs the same way as before, and sometime in December of 2016 or January of 2017, she is reimbursed \$400.

2. It is now July, 2018. Jane has decided to resign from her position with ACCUG. In this case, Jane would be required to pay back ACCUG the \$400 reimbursed to her on December 2016/January 2017, since two years have not passed since Jane received this reimbursement. Jane would not be required to pay back the \$500 she received under this program in May/June 2016, since she remained a full-time employee with ACCUG for at least two years since then.



Professional Training and Development:

Periodically, it is necessary for individual employees or groups of employees to take job-related training courses that are not part of an educational or degree program. This can enhance an employee's value to ACCUG, keep them up-to-date on the latest trends, technologies, and knowledge, and offer a great chance to interact with peers and develop professional networks. Training and development goals and specific courses are identified in conjunction with the employee's supervisor, as part of an employee's development plan, and can include a variety of courses from an array of sources. This kind of training (including certification programs) may not be eligible under TRP.



Tax Implications for Participants:

The federal government currently allows up to \$5,250 annually, in employer-provided educational assistance benefits, to be “tax free” to TRP participants. This applies to both undergraduate and graduate-level courses. This “tax free” exemption currently applies through 2015. An employee must generally pay taxes on employer-provided educational assistance benefits in excess of \$5,250. This amount will be included in the employee’s wages (Box 1 of Form W-2). A tax professional should be consulted for further information concerning taxable tuition.

Disclaimer:

The Tuition Reimbursement Program is intended to be a benefit for employees interested in the program. It is not intended, and should not be taken, as a statement of legal rights and responsibilities. While every effort has been made to ensure the accuracy of information included herein, discrepancies or errors are possible. In the case of a discrepancy between this report and the ordinances and policies governing benefits adopted by the Mayor and Commission, the actual ordinances and policies will prevail. The ordinances and policies from which the information in this document is based are subject to change or termination at any time by action of the Mayor and Commission.