



ADMINISTRATIVE DIRECTIVE

TUITION REIMBURSEMENT PROGRAM	NUMBER 2.01-11	PAGE 1 of 3
	EFFECTIVE DATE July 1, 2017	

I. **PURPOSE**

To set forth city-wide policy for Tuition Reimbursement and delegate authority to the Human Resources Department to administer the Tuition Reimbursement Program consistent with the intent of this AD.

II. **POLICY**

It is the policy of the City of Tucson to encourage employees to pursue higher education outside of work hours to upgrade skills and become more efficient at work, all of which contribute to the quality of city services. Contingent upon funding availability, the City will provide tuition reimbursement to Eligible Employees. Tuition Reimbursement is available to Eligible Employees who successfully complete higher education, technical, professional, or vocational courses or certifications that are related to either their current position or to other work or services performed by the City of Tucson. The Tuition Reimbursement Application and Agreement must be signed by the employee and approved prior to registration. The Human Resources Director is delegated as the final authority for approval of Tuition Reimbursement requests.

III. **RELATED DEFINITIONS**

- A. **Accreditation** means an institution recognized by the U.S. Department of Education that maintains standards requisite for its graduates to gain admission to other reputable institutions of higher learning or to achieve credentials for professional practice.
- B. **Eligible Employee** means 1) an appointed employee who has completed one-year of service and 2) permanent full-time and part-time employees who have completed probation. An employee must be an Eligible Employee prior to enrolling in any approved course or program to be eligible for tuition reimbursement. Courses must be taken during the employee's off duty hours or during periods of approved leave.
- C. **Eligible Institution** means an institution of higher learning to include university, community college, post-secondary trade, vocational or technical schools, and professional institutions, to include on-line or distance learning. The Human Resource Director shall determine whether an individual institution meets an appropriate standard of accreditation and shall maintain an approved list.
- D. **Employment Status** is defined by the number of hours an employee works: half-time is twenty (20) hours but less than 30 hours per week; three-quarter time is thirty (30) but less than 40-hours per week; and fulltime is forty (40) hours per week. An employee's status will determine the maximum percentage of reimbursement an employee is eligible to receive.



ADMINISTRATIVE DIRECTIVE

TUITION REIMBURSEMENT PROGRAM	NUMBER 2.01-11	PAGE 2 of 3
	EFFECTIVE DATE July 1, 2017	

IV. GENERAL PROVISIONS

- A. Reimbursement** After the date of publication of this AD, an application and the Tuition Reimbursement Agreement must be submitted to Human Resources prior to registration for approval. Any courses completed prior to publication, will require the employee submit an application and Tuition Reimbursement Agreement to Human Resources for approval. Only courses with a grade of “C” or better or “pass” for Pass/Fail and programs in which certificates have been awarded will be eligible for reimbursement. Employees will only be reimbursed for tuition costs and not for fees or books. Tuition reimbursement is subject to budgetary restrictions and contingent upon availability of funds and allocated on a first-come, first-serve basis.
- B. Prorated Reimbursement** Tuition Reimbursement is subject to proration based on Employment Status.
- C. Other Educational Assistance** Tuition Reimbursement is available only after reimbursement or assistance from any other sources has been exhausted. Thus employees who are receiving grants, scholarships, tuition or fee waivers, veterans or military education benefits or reimbursement from other sources may be eligible for City of Tucson reimbursement only for those tuition costs that exceed educational assistance from other sources.
- D. Maximum Reimbursement** The maximum amount any one employee can be reimbursed is limited to \$5,250 per fiscal year, effective July 1, 2017.
- E. Refund of Tuition Reimbursement** If an employee voluntarily resigns within twelve months after receiving reimbursement for completing a course or program, the employee will be responsible for refunding the tuition reimbursement received during the preceding 12 months to the City. The amount to be refunded will be prorated based upon the number of months worked since completing the reimbursed courses. The refund will be deducted first from the employee’s leave payout and, consistent with applicable laws, any remaining amount will be deducted from the employee’s final paycheck.

V. TAX IMPLICATIONS

The Tuition Reimbursement program is an educational assistance program intended to meet the tax exempt requirements under the Internal Revenue Service Code. If the tax exempt status of the tuition reimbursement program changes, participants will be notified and the City will comply accordingly.



ADMINISTRATIVE DIRECTIVE

TUITION REIMBURSEMENT PROGRAM	NUMBER 2.01-11	PAGE 3 of 3
	EFFECTIVE DATE July 1, 2017	

VI. AUTHORITY

The Human Resources Department will develop procedures for administering the Tuition Reimbursement Program consistent with this AD, subject to legal review and the approval of the City Manager.

**Review Responsibility
And Frequency**

The Human Resources Director will review this directive annually, based on the date of publication.

Authorized



City Manager
Michael J. Ortega



Date

Tuition Reimbursement Application and Agreement

(Application must be submitted to HR and approved prior to enrolling to be eligible for Tuition Reimbursement)

EMPLOYEE SECTION

Date of Request: _____ Pre-Approval _____ Reimbursement Request _____

Employee Name: _____

Employee ID: _____ Hire Date: _____

Department/Division: _____ Work Phone: _____

Employment Status: Full Time _____ Half Time _____ Three-Quarter Time _____

I hereby declare:

My Employment Status

- I am a permanent employee and I have passed probation (i.e., not a probationary employee).
- I am not on leave-without-pay status.
- I am submitting for a /certification/course/major/degree which relates to either my current position or to other work or services performed by the City of Tucson.
- I am not in the final 12 months of TSRS End-of-Service or PSPRS Drop, nor am I in my final 12 months of employment prior to retirement from the City of Tucson.

Eligible Institutions

- I am submitting for an eligible institution:
 - Listed in Appendices A or B of Tuition Reimbursement A.D. 2.01-1I (i.e., regionally accredited college or university with physical facilities in Arizona, or a nationally accredited post-secondary institution with physical location in Tucson, AZ.), or
 - Listed in Appendix C of Tuition Reimbursement AD 2.01-1I (Pima Community College Transfer Partnership).
 - Non-credit institutions: Pima Community College, Maricopa Community College, University of Arizona, Arizona State University, Northern Arizona University Self-Paced Personalized Learning Program, Coursera for certificates (not academic credit) and other institutions only approved by HR Director or Deputy Director.
-

Deadline for Submitting Request/Documentation

- I understand that upon completion of my course (within 30 days) I must submit my request online in the City of Tucson CityLearn (citylearn.tucsonaz.gov) using the tuition reimbursement request form, and correctly checked my employment status (fulltime, ¾ time, ½ time).
- I understand the City reserves the right, either before or after approving a request, to require documentation such as transcripts (unofficial or official), verification of academic program of study and plan (degree and major), and verification of tuition payments (including paid invoices), scholarships and grants received or declined, and/or to periodically audit tuition reimbursement participant documentation.

Dollar & Credit Cap

- I understand that my reimbursements are limited to \$5,250 per annum, or thirty (30) credits/units, which ever comes first, each fiscal year (July 1 – June 30), and that reimbursement requests must be submitted in the

same fiscal year as the courses were completed.

- I understand tuition reimbursement is subject to the maximum amount budgeted for each fiscal year. Reimbursements may be denied if the budgeted allocation is expended prior to the end of any fiscal year.

Grants, Scholarships, Military Benefit, Other Reimbursements

- I have not received grants or scholarships (not including student loans) for tuition payments for which I am seeking reimbursement. I understand that I may seek reimbursement only for the difference between the scholarship award and the tuition cost, not to exceed the applicable reimbursement rates set forth in the AD.
- I am not eligible nor have I received reimbursement or a waiver under any state or federal sponsored military education entitlement program including but not limited to: Montgomery GI Bill, Post-9-11 GI Bill, or Arizona National Guard reimbursement benefits.
- I further understand the failure to abide by these requirements, or the failure to produce requested documents may result in the reversal of any tuition reimbursement requests for the term(s) in question.

AGREEMENT AND AFFIDAVIT

- I, _____, have read the Tuition Reimbursement Administrative Directive 2.01-1I and I certify that 1) I do not plan to separate employment within 12 months of receiving this reimbursement; and, 2) I understand if I voluntarily separate employment from the City of Tucson, that any reimbursement I have received for classes completed within last 12 months must be refunded to the city on a prorated basis.
- I _____, affirm that I have meet all the above requirements and have answered truthfully.

Signature	Employee ID#	Print Name	Date
------------------	---------------------	-------------------	-------------

Copies of final grades/certification and documentation of tuition paid must be provided before reimbursement will be made

To be completed by Human Resources Only

Eligible: Yes ___ No ___

Payment Amount Authorized: \$ _____

Approval Signature: _____

Date: _____

Comments: _____

