

Section 7: Benefits

Policy #6: Educational Assistance

Effective Date: July 1, 2011

I. Purpose

The purpose of this policy is to motivate and encourage employees to obtain education and instruction that will enhance job performance or encourage job related development and thus be in the best interest of service to the citizens of Mooresville.

II. Scope

This policy shall apply to all persons holding a regular full-time paid position as an employee of the Town who have successfully completed their initial probationary period and have a current evaluation score of “meets expectations” or above. This policy does not apply to the Town Manager, Town Attorney, a member of any appointed or volunteer board or committee, or any others that may be hired or appointed by the Town Board. For this purpose, and subject to the exceptions set out herein, Town employees shall be defined as those employees in departments and offices for which the Town Board serves as the final budget authority.

III. Background

None

IV. Definitions

Course – educational work administrated by an institution accredited by the Southern Association of Colleges and Schools and the State Board of Education in North Carolina or similarly recognized accrediting agencies. Also included are educational programs in the vocational, technical and GED areas.

Job-related or developmental course – a course that directly enhances present job performance or meets reasonable developmental objectives.

Reimbursement – Town reimburses tuition cost to employee.

V. Legislation

None

VI. Policy

Within the limits of funding provided in the town budget, reimbursements of tuition may be made available through the Department of Human Resources for employees who successfully complete approved job-related or developmental courses.

VII. Provisions

- A. Application for tuition reimbursement shall be made by the employee no later than three (3) weeks prior to the start of the course(s).
- B. Department Director or designee approval is required. Notification of tuition reimbursement approval will be made by the Department of Human Resources.
- C. Reimbursement is contingent upon the employee earning a minimum grade of "C" for an undergraduate course. Graduate level courses require a minimum grade of "B." Where applicable, a certificate of satisfactory completion will be sufficient. Proof of grade or certificate and receipts for tuition must be received in the Department of Human Resources before reimbursement can be made.
- D. Tuition reimbursement shall be made for books and tuition only.
- E. Instruction, classes or programs may not be approved if similar instruction, classes or programs are available through the Town. Reimbursement should not be requested in lieu of similar educational opportunities which are available free of charge.
- F. Reimbursement will be provided in accordance with the following two tiers:
 - i. Tier I
100% of the maximum reimbursement allowed is provided for those employees enrolled in an associates, bachelors or masters degree program in the areas of engineering, leadership/management, economics, planning, criminal justice, mathematics, fire science, library/information science, accounting, information technology, business, political science, public administration, human resources or recreation. 100% of the maximum reimbursement allowed is also provided for those employees who are enrolled in a GED program or a vocational/technical program that is directly related to Town service. With Human Resources and Town Manager approval, additional programs of study may be approved.
 - ii. Tier II
50% of the maximum reimbursement allowed is provided for those employees enrolled in any job related or developmental courses not included in Tier I. Department Directors have the discretion to fund the remaining 50% of tuition reimbursement from their budgets if it is in the best interest of the department.
- G. Maximum reimbursement per fiscal year shall not exceed \$3,000.
- H. An employee who voluntarily resigns from Town employment must repay or have deducted from salary any tuition reimbursement paid. Employees leaving Town employment within twenty-four (24) months from the date of reimbursement will be required to pay back all tuition reimbursement received during such twenty-four (24) month period. The twenty-four (24) months counts forward from the date of the last reimbursement until the date of resignation.

- I. Final approval for tuition reimbursement will be made by the Director of Human Resources or designee.

VIII. Authorization

Approved by:

Erskine Smith
Town Manager

July 1, 2011
Date

Educational Assistance Form

Instructions: Employee must complete this form and submit to Human Resources no later than three (3) weeks prior to the start of the course(s). Employee will be reimbursed when evidence of official course grade(s) and an itemized receipt of eligible fees listing the course name, credits and tuition per credit are received by Human Resources.

Employee Name:		Department:		Job Title:		Telephone #:	
Supervisor's Name:				Academic Institution to Attend:			
# of Hours Needed to Complete Degree/Program:				Estimated Start Date:			
Course Title & Number			Hours/Credits		Course Fee (tuition & books only)		Estimated Completion Date
Degree or Program Information: (Please check one)							
<input type="checkbox"/> Associates <input type="checkbox"/> Bachelors <input type="checkbox"/> Masters <input type="checkbox"/> GED <input type="checkbox"/> Vocational/Technical (list) _____							
Course of Study: (If checked Associates, Bachelors or Masters above, please check one)							
<input type="checkbox"/> Engineering <input type="checkbox"/> Leadership/Management <input type="checkbox"/> Economics <input type="checkbox"/> Planning <input type="checkbox"/> Criminal Justice <input type="checkbox"/> Mathematics <input type="checkbox"/> Business <input type="checkbox"/> Fire Science <input type="checkbox"/> Library/Information Science <input type="checkbox"/> Accounting <input type="checkbox"/> Information Technology <input type="checkbox"/> Recreation <input type="checkbox"/> Political Science <input type="checkbox"/> Public Administration <input type="checkbox"/> Human Resources <input type="checkbox"/> Other (list) _____							
Justification: (How will this degree or program assist you in your current position or enhance your potential for advancement with the Town? Attached extra pages if needed.)							
<p>Certification and Authorization: I understand that if my application is approved, the Town of Mooresville will reimburse the cost of tuition and books for regular full-time employees who have a current employee evaluation score of "meets expectations" or above. I also understand that in order to be reimbursed at the end of the course, I must provide proof of a grade of "B" for graduate courses or "C" for any other courses, in addition to an itemized receipt from the educational institution. I also understand that should I leave the Town's employment within two years of being reimbursed for the above course(s), I must repay the Town the full amount of this reimbursement. I understand that monies owed can be deducted from any compensation due me when I separate from Town of Mooresville employment and I hereby give my consent for such a deduction. I have read and understood the Town's Educational Assistance Policy and agree to the terms stated therein.</p>							
Signature:				Date:			
Department Head Signature:				Date:			
Human Resources Director Signature:				Date:			
HR USE ONLY				HR VERIFICATIONS			
<input type="checkbox"/> Approved <input type="checkbox"/> Denied \$_____ amount paid to date for employee \$_____ amount to pay \$_____ total paid				<input type="checkbox"/> Initial Probation Complete <input type="checkbox"/> Performance Evaluation ≥ ME <input type="checkbox"/> Accreditation Verified Signature: _____ Date: _____			

