 Inland Empire Utilities Agency A MUNICIPAL WATER DISTRICT	Document No: A-39 Policy: Reimbursement of Educational Expenses	
	Revision No: 8	Effective Date: 7/1/2018

1. PURPOSE

The purpose of this policy is to establish procedures for the reimbursement of educational expenses that are related to an employee's job with the Agency, or as otherwise provided for under this policy, subject to the availability of budgeted funds. The reimbursement of educational expenses is meant to assist an employee in enhancing his/her job knowledge and skills, by providing reimbursement for certain expenses related to the maintenance or improvement of job-related skills, and/or is required to obtain/renew a certificate/license in order to legally perform the essential functions of his/her job classification, or when he/she is pursuing/renewing a job-related optional/voluntary certification. Costs for general education courses are not reimbursable under this policy unless the employee is required to take such classes to receive a degree associated to his/her job with the Agency.

This policy is consistent with the Agency's business goal of Business Practices commitment of applying ethical, fiscally responsible principals to all aspects of the business and organizational conduct.

2. DEFINITIONS

- 2.1 Authorized Employees – For the purposes of this policy, “authorized employees” shall include all full-time regular employees and does not include intern, temporary, part-time, or limited term staff.

3. PROCEDURES

3.1 Process Flow




3.2 Eligibility

- A. An employee is eligible for the reimbursement of educational expenses (tuition/registration fees, books, parking fees, and other required course/program materials) provided:



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1. He/she is a regular full-time employee of the Agency working forty (40) hours per week, and has completed his/her original probationary period (unless otherwise approved by the Manager of Human Resources); and,
2. The selected course/program/degree is related to his/her employment with the Agency and/or is required to obtain/renew a certificate/license in order to legally perform the essential functions of his/her job classification, or he/she is pursuing/renewing a job-related optional/voluntary certification; and,
3. He/she did not enroll in the course/program/degree prior to completion of his/her original probationary period (unless pre-approved by the Manager of Human Resources); and,
4. He/she has obtained approval from the respective Department Manager and the Manager of Human Resources, or in the case of Executive Managers, from the General Manager prior to registration in the course/program/degree; and,
5. Supervisor Unit and Unrepresented employees may obtained approval from the respective Department Manager and the Manager of Human Resources, or in the case of Executive Managers, from the General Manager after registration in the course/program/degree; and,
6. He/she has submitted an Application for Educational Expenses Reimbursement Form (available on AIM) stating the educational objective(s) for each course/program/degree, outlining the course/program contents, stating the completion schedule, explaining the necessity of said certificate/license (where applicable), and providing the direct benefit(s) to the employee's job with the Agency; and,
7. He/she has not terminated employment or has not been on a leave of absence, greater than 30 calendar days, prior to submission of the required course/program grades or verification of completion and fee/cost receipts, (in the event the employee is on a leave of absence, submission of documents is to be made within ten working days after the employee returns to work); and,

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8. He/she did not or will not receive duplicate financial assistance from any student aid, scholarship, or grant program.
 - a. Any financial assistance received from non-Agency sources is to be disclosed.
 - b. Reimbursement provided for under this policy shall be limited to those expenses not covered by the non-Agency funding.
9. Employees may include all methods of payment and shall not be reduced based on employee's qualifications for financial aid loans.
 - a. Financial aid loans may be reimbursed up to the IRS limit of \$5,250 per fiscal year. Financial aid loans reimbursements excludes installment loan payments.

3.3 Reimbursements

- A. Non-graded courses/programs, correspondence courses/programs, CEU classes, and similar educational offerings which are not mentioned herein, but are designed to meet position-related developmental needs of an employee or are required for certification/licensing, and are compatible with the specific, strategic, and technical goals of the Agency, will be considered, on a case-by-case basis, for approval by the respective Department Manager and the Manager of Human Resources, or in the case of Executive Managers, from the GM.
- B. Tuition/registration, books, parking, and other required course/program expenses (i.e., laboratory fees, field trips, etc.), for college-level course/program work, correspondence courses/programs, and similar educational offerings which are designed to meet job-related developmental needs of an employee or are required for certification/licensing, will be reimbursed at the actual cost of said course/program not to exceed the annual reimbursement amount provided for in this policy.
- C. Costs that are charged by the institution or the sponsoring organization, but are not directly related to the course/program/degree content (i.e., health fees, student services fees, facility use fees, and other miscellaneous fees) are not reimbursable.
- D. Reimbursement for employment-related courses/programs/degrees is available on a first come, first served basis, subject to availability of budgeted funds.

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E. The maximum annual reimbursement amount per Fiscal Year is as follows:

Executive Management Employees	\$5,250
Unrepresented Employees	\$5,250
Supervisors' Unit Employees	\$5,250
Laboratory Unit Employees	\$5,250
Operators' Unit Employees	\$5,250
General Unit Employees	\$5,250
Professional Unit Employees	\$5,250

F. For the purposes of this policy, the Fiscal Year that the payment shall be credited to shall be determined by the date that reimbursement is paid to the employee.

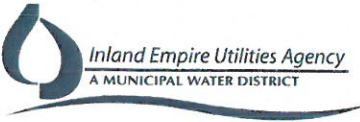
G. Employees who receive reimbursement must agree to reimburse the Agency for all educational reimbursement received in the twelve (12) months prior to separation if the employee voluntarily separates from his/her employment with the Agency.

H. To qualify for reimbursement, employees must successfully complete a pre-approved course/program/degree with a grade of 2.0 (C) or better, or present written verification of satisfactory completion of approved training from the sponsoring organization.

I. Verification of successful completion may be by a letter of completion from the course/program instructor, a certificate of completion, or presentation of the final or official grade report. The Agency reserves the right to request a copy of an official transcript at any time.

J. Reimbursements will be processed when proof of satisfactory course/program completion is presented and original receipts and proof of payment are submitted by the employee to his/her immediate supervisor and upon submission and approval of the Request for Reimbursement portion of the approved Application for Educational Expenses Reimbursement Form.

K. Books and other course/program/degree materials, for which employees receive reimbursement from the Agency, shall become the property of the employee.

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4. RESPONSIBILITIES

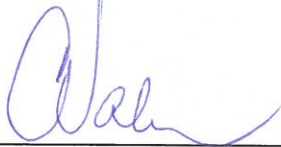
- 4.1 Employee – Responsible for submitting completed Application for Educational Expenses Reimbursement, and submitting verification of satisfactory completion and original payment receipts or copies of cancelled checks for costs associated with educational expenses to the Human Resources Department.
- 4.2 Department Manager – Responsible for review and approval of the Application for Educational Expenses Reimbursement following the provisions of this policy.
- 4.3 Manager of Human Resources – Responsible for review and approval of the Educational Expenses Reimbursement, maintaining all references including forms, and overall administration and periodic review of this policy.

5. REFERENCES

- 5.1 Application for Educational Expenses Reimbursement Form

6. APPROVAL

APPROVED:



Christina Valencia
Executive Manager of Finance and Administration/AGM

