



Board of Supervisors Memorandum

April 19, 2022

Education Reimbursement Program

Background

In keeping with our steps forward to become a more competitive employer of choice, we must invest in employees and continue to transform our organization. Providing educational reimbursement will help us retain employees by fostering their professional development, attract career-minded talent, and boost our employer brand. Therefore, I am recommending we implement an Education Reimbursement Program. (Attachment) This procedure outlines employee eligibility and course options that are directly related to an employee's current job, related to a position in the employee's related career track, or towards a curriculum program leading to a degree certificate or license.

Pima County had an educational reimbursement program previously, but it ended in December 2008 and has not yet been reinstated

Pre-approval is required by the Appointing Authority and Human Resources, with the program providing up to \$5,250 per calendar year towards the cost of tuition, required books, registration fees, and laboratory fees. The Employee's lifetime maximum benefit would be for reimbursement of one Bachelor's degree and one Master's degree.

It is recommended that \$500,000 in General Funds be set aside each fiscal year to support this effort. Reimbursement would be made to employees on a first-come, first-reimbursed basis until the funds are exhausted for that fiscal year.

Recommendation

Should the Board of Supervisors approve the dedicated funding, the Education Reimbursement Program Administrative Procedure will be implemented for the 2022/23 fiscal year.

Sincerely,

A handwritten signature in black ink, appearing to read "Jan Lesher", is written over a horizontal line.

Jan Lesher
County Administrator

CHH/anc – April 7, 2022

Attachment

c: Carmine DeBonis, Jr., Deputy County Administrator of Public Works
Francisco García, Deputy County Administrator and Chief Medical Officer
Health and Community Services
Michelle Campagne, Director, Finance and Risk Management
Cathy Bohland, Director, Human Resources



ADMINISTRATIVE PROCEDURES

Procedure Number: 23-XX
Effective Date: XX X, 2022

County Administrator

SUBJECT: **EDUCATION REIMBURSEMENT PROGRAM**

DEPARTMENT RESPONSIBLE: **Human Resources Department**

I. STATEMENT

Pima County is committed to employee professional development. The objective of the Education Reimbursement Program is to provide a means for employees to develop and enrich skills, remain innovative, enhance productivity and job performance, and to improve the quality of services provided to County residents and visitors through our core values of being Accountable, Respectful, and Ethical.

II. DEFINITIONS

Accreditation: Certification of educational institutions by regional and national accreditation bodies for meeting all formal requirements of academic excellence, facilities, curriculum, etc., and for maintaining standards requisite for general recognition of the validity of credentials obtained by graduates signifying they have obtained a specified level of subject knowledge and thereby may obtain admission to other reputable institutions of higher learning or achieve credentials for professional practice.

Grade Report: Documentation of a final recorded grade verifying completion of a course. Grade reports may be official or unofficial transcripts and shall include the employee's full name, the name of the institution, name of the course completed, date issued, and grade received.

III. EMPLOYEE ELIGIBILITY

- A. Any permanent, full-time (40 hours per week) or part-time employee (20 hours per week or more) who has successfully completed an initial probationary period, or 12 months of service, whichever is applicable (benefits under this program are prorated based on employment status at the time the application is approved);
- B. Employee has not received formal discipline during the 12 months preceding the completed Education Reimbursement Application;
- C. Employee performs the duties of their position at a satisfactory or above satisfactory level as verified through the employee's performance appraisal;
- D. Employee must maintain active work status throughout their course enrollment. Employees who are not on state or federal protected leave and are in an unpaid status at the time of their application submission, approval, or final reimbursement are not eligible.

IV. COURSE ELIGIBILITY

A. Eligible Course Requirements

1. Courses of instruction taken at, or through, accredited private and public institutions of learning such as universities, colleges, trade schools or technical institutions, and in some cases, professional organizations granting certification or licensing. Certain out-of-state correspondence courses are also eligible as long as the institution is fully accredited.
2. Pre-approval from Human Resources is required at least 15 calendar days prior to the start of class. Therefore, employees must submit their application packet to Human Resources for pre-approval no later than 21 calendar days before the classes are scheduled to start. Only courses approved prior to enrollment will be eligible for reimbursement.
3. The course must meet one of the following conditions as determined by the Employee's Appointing Authority:
 - a. It is directly related to the employee's current job;
 - b. It relates to the class specifications of a position in a related career track;
 - c. It is a required course in a curriculum program leading to a degree, certificate or license.
4. Courses taken must be for an academic grade, pass/fail credit, certification or licensing.

B. Non-Eligible Courses

1. Seminars, workshops, fees to obtain a professional license, examination preparation courses (e.g., CPA, Internal Audit, Social Work/ASWB), continuing education units to maintain certifications or licensures, and conferences. Departments are not prevented from paying from these out of their budgets if a Department elects to reimburse employees for these types of learning opportunities and where approved by the Appointing Authority;
2. Study abroad courses or classes attended outside of Arizona; however, on-line courses are eligible if they meet all eligibility criteria, regardless of where offered;
3. Courses taken for "audit" or "no credit" purposes do not qualify for reimbursement;
4. Course credits given by examination only (i.e., CLEP, SHRM, etc.) or for job related experience;
5. All doctoral degree and Ph.D. classes and programs (including but not limited to law, medicine, veterinary medicine, dentistry, pharmacology, chiropractic, etc.).

V. LEVEL OF ASSISTANCE

A. Reimbursement Amounts

1. Maximum amount of reimbursement per employee is \$5,250 per calendar year.
2. Reimbursement for tuition for approved courses and for required books, registration fees, and laboratory fees where a grade of "C" or higher or "Pass" is obtained will be reimbursed at 100%.

B. Limits

1. Each fiscal year the Board of Supervisors must approve the general funds available for this program. Funds will be reimbursed on a first-come, first-reimbursed basis until they are exhausted for that fiscal year. Once approved by Human Resources, the funds must be encumbered to ensure employees receive reimbursement upon successful completion of the course.
2. Meals, lodging, transportation, tools or supplies, application fees, assessment fees, "recommended" textbooks, and late registration fees are not reimbursable.
3. Employees who are receiving grants, scholarships, tuition or fee waivers, veterans or military education benefits, or reimbursement from other sources may be eligible for reimbursement only for those tuition costs that exceed education assistance from other sources.
4. The calendar year in which the course meets for the last time determines the calendar year in which the course is eligible for reimbursement.
5. Employees may only seek reimbursement for one Bachelor's degree and one Master's degree (lifetime maximum). Employees must obtain Human Resources approval prior to changing from one degree program to another, to ensure compliance with the program.
6. This program may be suspended by the County Administrator at any time and without advance notice when financial constraints exist. If financial conditions improve, the County Administrator may consider reinstating funding for this program.

VI. PROCEDURE

Failure to follow the outlined procedure to include approvals and filing timelines will result in the denial of the education reimbursement request.

A. Pre-Approval Required

1. No more than 60 calendar days prior to, but no later than 21 calendar days prior to the start of the education course work at a university, college, trade school or technical institution, etc., for which the employee will seek Education Reimbursement, the employee will complete an application for the Education Reimbursement Program. The application will include the name of the institution, the degree/certificate to be obtained, the course/unit/class

being taken. Applications may be approved for a specific degree, certificate program, or for an individual class reimbursement for a course directly related to an employee's job. Each course in a specific degree or certificate program must be preapproved:

- a. The Department's Appointing Authority or designee will approve or deny the request.
- b. Human Resources must approve the one-time degree, certificate program, or individual class for a course directly related to an employee's job, to include individual classes for a degree or certificate program, prior to receiving reimbursements for the class.

B. Reimbursement

1. Within sixty (60) calendar days of the last day of class and after successful completion of eligible course work, employees must submit a complete application packet to the Human Resources Department. The application packet must include:
 - a. A completed Education Reimbursement application form with a signature indicating the Department's and Human Resources approval;
 - b. One (1) copy of the grade report, certification form, license or documentation supporting successful progress in cases of certification or licensing programs. Acceptable grade reports include those that are official, accessed online, or statements on official letterhead from the education institution;
 - c. One (1) copy of an official fees receipt from the institution attended showing actual fees paid by the eligible employee. **NOTE:** All payments are reimbursed through Finance and Risk Management's Payroll Division. Payments made outside this process are not permitted.
2. Upon receipt of the completed application packet within the required time period, authorization for payment will be forwarded to Finance who will include the reimbursement in the employee's subsequent paycheck.
3. No advance payment shall be made to employees for Education Reimbursements and no payment will be made directly to an institution.
4. An employee shall only attend courses and complete their coursework during their non-work hours.
5. An employee shall not use Pima County equipment to perform tasks related to the employee's coursework.

- C. Upon termination, an employee is required to return 50% of the total Education Reimbursement funds received within the last six (6) months, in accordance with Personnel Policy 8-123. Employees in a layoff status who have exercised their reemployment/reinstatement rights are exempt from this provision.

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- D. The signed Education Reimbursement Application must be placed into the employee's Official Personnel File.
 - E. If the employee's application for Education Reimbursement Program eligibility is denied, the Appointing Authority shall inform the employee of the denial within ten (10) business days of the application and provide the employee with a copy of the denial and the reason for the denial. The denial of an employee's Education Reimbursement Application is not grievable or appealable.

VII. **RESPONSIBILITIES**

- A. The employee must submit all required materials within the time limits given to their Department and ensure that it is forwarded to Human Resources for approval.
- B. The employee's Appointing Authority, or designee, shall:
 - 1. Review and approve the eligibility of the course work before it is submitted to Human Resources for review and verify whether the coursework is directly related to the employee's current job or whether it relates to a class specification of a position in a related career track;
 - 2. Rescind approval for an employee to participate in the Education Reimbursement Program if the employee receives formal discipline or when the approved class or classes have not commenced.
- C. The Human Resources Department must:
 - 1. Determine if the application packet was received on a timely basis;
 - 2. Determine if all required information is included;
 - 3. Where the course is not directly related to the employee's current job or related to a class specification of a position in a related career track, determine whether the course is required in a curriculum program leading to a degree, certificate, or license;
 - 4. Review the final grade or certification to determine whether it is acceptable;
 - 5. Provide approval/denial and notify the employee, employee's Department, and the Payroll Division.