808.17: Educational Reimbursement Benefit

Objective:

To provide financial assistance for educational expenses to eligible City of Orlando employees. This policy and procedure applies to City employees assigned to permanent, part-time, and benefit-eligible contract positions except where superseded by collective bargaining unit agreements.

Authority:

This procedure was amended by City Council June 26, 2023, Item A-.

Direction:

Human Resources Director, as an appointed official, serves at the pleasure of the Mayor, and receives direction through the Chief Administrative Officer (CAO) or designee.

Functions:

1. General

   Financial assistance may be available to permanent full-time, permanent part-time, and benefit-eligible contract City employees who have completed their initial probationary period and seek to improve their knowledge by participating in educational courses while employed by the City.

   Employees receiving payment for educational expense from any other source other than a loan shall not be eligible for the benefits

provided herein. The Human Resources Department shall administer the educational program for all eligible City employees.

Reimbursement for educational expenses may be considered for courses taken at an educational institution which is accredited by the U.S. Department of Education, Database of Postsecondary Institutions and Programs (e.g., community college, university, graduate, or trade/vocational school), and where course credit is given upon completion.

Funding priority will be given to Job Improvement Courses (defined below), and Human Resources reserves the right to make the final decision on what may be approved and funded under the Educational Reimbursement benefit.

Courses that meet the above criteria may include:

a. Job Improvement Courses

   Courses directly related to the employee's current assignment that will improve the skill, knowledge, and ability of the employee in performing their duties and increase, through more advanced techniques, the potential for promotion. For example, an electrician working on signal devices pursues a course in electronics. Such a course will provide advanced knowledge and training in the performance of their current assignment and result in more benefits to the employee and the City.

b. Career Courses

   Courses that will increase the employee's knowledge, skills, and ability in a career path that is relevant to City of Orlando government, though different from the employee's current assignment. An example would be a maintenance worker enrolling in computer programming courses. While these courses may not pertain to the employee's current duties or to a departmental career progression, they do provide an education that can be applied to City government operations.

c. Courses that will not be considered for the educational reimbursement benefit include and are not limited to:

   i. Degrees not relevant to City of Orlando government positions

   ii. General training courses or preparatory or refresher courses

   iii. Seminars, workshops, certifications, or re-certifications

   iv. Courses for which Continued Education Units/Credits (CEUs) are awarded

   v. Licenses, memberships

   vi. Exams (except as provided in section C, 5)

   vii. Commercial Driver's License (CDL)

   viii. General Education Development (GED)

   ix. Doctor of Philosophy degree (PHD)

2. Application Procedure

a. The Educational Reimbursement Administrator (designated by the Human Resources Department) will determine whether the course(s) qualify for the Educational Reimbursement benefit.

   Employees desiring to participate in the City's Educational Reimbursement benefit shall complete the appropriate application (Form 808.17.1) and attach such application, in PDF format, to a Spend Authorization in Workday. The Spend Authorization with the attached application will route to Human Resources as well as the employee's management for review, approval, and processing.

b. Submitting a Spend Authorization online for review and potential approval constitutes an electronic signature that the

employee has read and understood and agrees with this policy and the Terms of Agreement as expressed on the respective Educational Reimbursement application.

c. The application for program participation shall provide an agreement by the employee, stipulating that should the employee terminate employment with the City within two (2) years of course completion date, voluntarily or involuntarily (except as provided in section E), the City shall be reimbursed for funds paid to the employee for educational expenses as stated on the appropriate application (see Form 808.17.12).

d. Request for educational reimbursements must be submitted with a Spend Authorization in Workday on or before the course start date. The Spend Authorization must include all required documentation. Spend Authorizations with missing or incomplete information may be denied. Spend Authorizations submitted after the course start date will be denied.

e. Upon receipt and review of the Spend Authorization and attached application, Human Resources will review within five (5) working days and will make a determination within that time.

3. Reimbursement for Course Work

a. Payments for courses will be processed within the limits of the available. Human Resources Educational Reimbursement budget allocation for the corresponding Fiscal Year (October 1 to September 30).

b. Financial assistance may be provided to cover the cost of course tuition, books and related taxes of the purchase, and certain required school fees such as health fee, athletic fee, scholarship fee, service fee, technology fee, library fee, or facility fee.

c. Expenses including but not limited to late-payment fees, equipment purchases/rentals, supplies, parking/transportation,

shipping, and other miscellaneous costs are not covered by this program.

d. Reimbursement shall be limited to $1,800 to employees in permanent and benefit-eligible contract full-time positions and $900 to employees in permanent and benefit-eligible contract part-time positions for course work completed during each Fiscal Year. Employees covered by a collective bargaining agreement should refer to these agreements.

e. College Level Examination Program (CLEP) courses are also eligible for educational reimbursement. Employees who satisfactorily pass CLEP exams based on their out-of-class room experience (e.g., self-study activities, job experience) and receive full credit for a course as if it had been taken, completed, and passed, may be reimbursed for the cost of these exams.

f. Within sixty (60) calendar days after completion of the course(s), employee must submit an Expense Report in Workday. The Expense Report must include attachment(s), in PDF format, showing official completion documentation and applicable receipts (e.g., grade report/official transcript, book receipt, and receipt for tuition). Human Resources will determine what may be considered official and acceptable documentation for grades/transcripts, tuition, and book receipt.

g. Submission of an Expense Report does not constitute a guarantee of approval. Additionally, any documents that are missing, incomplete, or those that need to be revised in any fashion on the Expense Report need to be re-submitted within the sixty (60) calendar days from course end date or it may be denied.

h. Employees attending institutions which defer payment pending reimbursement must, upon completion of the course, complete an Expense Report online and attach the proof of registration, official statement of the school’s deferred payment plan in lieu

of tuition/fee receipts, book(s) receipt and grade report /official transcript within sixty (60) calendar days from course end date. The Education Reimbursement Administrator will determine what may be considered official and acceptable documentation for the deferment and related documentation.

i. Monies for educational reimbursement will be issued to employees as a direct deposit or a separate check pending final approval of an Expense Report.

j. If an employee fails to attain a grade of “C” or better, a grade of “pass” in a pass/fail course, “satisfactory” in a satisfactory/unsatisfactory course, “complete” in a complete/incomplete course, or certificate of course completion, or fails to successfully complete the course, withdraws from a course, or fails to submit complete, official documentation of grades and receipts within the specified time (sixty (60) calendar days from course end date), the City will not reimburse such educational expenses.

k. Internal Revenue Service (IRS) regulations require that, in certain cases, monies received by employees for reimbursement of educational expenses be reported as an adjustment to their gross income and taxed accordingly. The Human Resources Department will comply with the law or regulation in effect at the time of the reimbursement payment.

4. Appeal of a Denial of Application for Reimbursement

An application for educational reimbursement can be denied at two stages of the application process: 1) within the requesting employee’s department by either the Division Manager or Department Director or 2) by the Educational Reimbursement Administrator.

This section establishes an appeal process for either case.

a. Denial within the employee’s department

i. If the application is denied by the employee's Division Manager, the employee may appeal to the Department Director within five (5) working days of the denial, the employee may appeal to the Department Director. The Department Director has five (5) working days to advise the employee of the decision. If the Department Director approves the application, the form shall be forwarded to Human Resources for review and potential final approval and processing.

ii. Denial by Department Director

If the application is denied by the employee's Department Director, the employee may appeal to the Human Resources Director (or designee) within five (5) working days of the denial. The Human Resources Director (or designee) shall evaluate the employee's appeal and within five (5) working days of the receipt of the appeal advise the employee of a decision or provide status of appeal request.

The decision of the Human Resources Director (or designee) shall be final.

b. Denial by Human Resources

If the application is denied by the Educational Reimbursement Administrator, the employee may appeal to the Human Resources Director (or their designee) within five (5) working days. The Human Resources Director (or designee) shall evaluate the employee's appeal and within five (5) working days of receiving the appeal advise the employee of a decision or provide status of appeal request.

The decision of the Human Resources Director (or designee) shall be final.

5. Death, Permanent Disability, Layoff

If the employee, through death, disability, or permanent layoff through no fault of employee, fails to continue the required tenure of employment as provided herein, any remaining liability for reimbursement of educational expenses shall be canceled.

Expiration of an employment contract or the termination of the contract prior to the expiration date will not be considered a layoff, and repayment of educational expenses reimbursed will be required.

Forms:

Educational reimbursement benefit application forms:
808.17.12 (for all employees)

Committee Responsibilities:

None.

Reference:

City Council minutes of December 14, 1970, Item 37; amended June 28, 1971, Item 23; amended, July 15, 1974, Item 26; amended December 16, 1974, Item 27; amended June 7, 1976, Item 31; amended May 16, 1977, Item 6; renumbered from 708.17 and amended January 23, 1984, Item 13A-19; amended May 13, 1985, Item 15A-2; amended July 18, 1988, Item 14A-1; amended October 9, 1989, Item 20A-26; amended April 1, 1991, Item 3/43; amended June 21, 1993, Item 2-P; amended August 9, 1993, Item OO; amended December 18, 1995, Item B; amended May 11, 1998, Item 6-A; amended April 3, 2000, Item 2PPP; amended July 17, 2000, Item 3-FF; amended April 2, 2001, Item B6; amended September 15, 2003; re-formatted only April 2004; amended June 26, 2023, Item A-.

Effective Date:

This procedure effective September 15, 2003.