

CITY OF PLANO POLICIES AND PROCEDURES

208.000

Department Name: Human Resources
Procedure: Tuition Assistance
Effective Date: 11/01/96
Revision Date(s): 03/01/01, 01/01/03, 10/01/03, 04/01/06, 07/01/06, 07/01/07, 04/01/08, 07/01/09 Policy Suspended, 01/01/12 Policy Reinstated, 01/01/13, 04/01/15

I. Purpose

To establish a policy for assistance of tuition **and course related fees** only.

II. Policies and Procedures

City of Plano regular full-time employees are eligible to apply for tuition **and course related fees** only assistance for eligible courses. **Late fees and finance fees are not eligible for reimbursement.** Tuition Assistance is applicable for **associate, bachelor,** or **master** level degrees from accredited colleges or universities. The City will reimburse an employee for only one associate degree, one **bachelor's** degree, and one **master's** degree.

A. Eligibility

In order for employees to be eligible for assistance under this policy, they must complete their initial probationary period prior to enrolling in the course(s). Civil Service employees must have completed at least six (6) months of employment with the City prior to enrolling in the course(s). Coursework must be from a nationally or regionally accredited school, college or university, and class attendance must be during the employee's off-duty time.

Job-related seminars, workshops, certifications, or other courses, which are short term, are *ineligible* for tuition assistance. Instead, these short-term courses should be funded through a department's training fund and applied for through the respective departments.

B. Grades Required

Classes may be taken for a grade, credit or pass/fail. The employee must make a passing grade as outlined below. If no grade is given, documentation that the course has been successfully completed is required.

Grade Required	Course Level
A, B, or C Credit or Pass	Undergraduate level courses
A or B Credit or Pass	Graduate level courses

C. Course Eligibility

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The City of Plano may provide tuition assistance when the degree plan meets one or more of the following criteria:

- Career development related to City functions
- Courses in preparation for a promotion within the City
- Relates to current job duties
- Provides new knowledge and skill to enhance job performance.
- Supports the documented "Performance Objectives" section of the employee's Performance Evaluation
- Enhances the City's ability to respond to current and/or future needs

Individual courses outside of the degree plan, but which are directly related to the employee's present or potential position with the City, may be considered for tuition assistance under this policy on a case-by-case basis, with the final determination on written approval made by the Human Resources Director.

Tuition Assistance eligibility will be approved or denied by Human Resources within 30 days after the deadline for receipt of the request. This decision may only be appealed to the Human Resources Director. The Human Resources Director's decision is final and cannot be appealed.

D. Assistance Cost

Beginning on or after **October 1, 2014**, employees shall be reimbursed for successfully completed courses with a maximum of **\$3,000** per Fiscal Year. Tuition Assistance cannot exceed actual course **and course related fees** cost.

Under no circumstances shall assistance exceed the amount of **\$3,000** per fiscal year. Only those courses identified **on the employee's degree plan, accompanied by** the "Annual Request for Tuition Assistance Funds" form, will be considered for assistance.

E. Assistance Procedures

Requests for tuition assistance must be made on an annual basis. Requests indicating the course(s) to be taken must be submitted by **May** 1 prior to the beginning of the fiscal year in which the course(s) will be completed. The "Annual Request for Tuition Assistance Funds" form (Appendix A) must be submitted electronically (for date and time submitted verification) to the Training Division in the Human Resources Department. The form must state the manner in which the degree is related to the employee's current job or

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other job within the City. A school-approved degree plan must be attached to the application. If a school-approved degree plan is not available, the recommended plan must be submitted. The form must also state the number of credits that are needed to complete the degree, the educational institution that the employee will be attending, the type of degree, the major, and the number of hours that the employee expects to attend during the next Fiscal Year (October 1 – September 30).

Once an employee has an approved “Annual Request for Tuition Assistance Funds” form and degree plan on file, they will not be required to reapply unless the degree or courses change. The employee’s Department Head must approve this request agreeing that this would be directly related to the employee’s job or future employment with the City of Plano and not affect current job performance. The employee will be required to submit the “Annual Request for Tuition Assistance Funds” form to the Human Resources Department each year during the budget process as a returning participant including the number of classes they propose to attend during the next Fiscal Year. Failure to submit a completed application will result in the application being ineligible for tuition assistance.

The “Annual Request for Tuition Assistance Funds” form is available in the MS Word Templates section under File>New>My Templates. Employees beginning a degree program after the May 1 deadline may complete and submit, electronically, an “Annual Request for Tuition Assistance Funds” form and required documents prior to enrolling in a degree program. Tuition Assistance will be given until the budgeted funds are exhausted. Those employees submitting the “Annual Request for Tuition Assistance Funds” form by June 1 will have priority on receiving Tuition Assistance.

Upon completion of the course(s), the employee will electronically (for date and time verification) submit the “End of Semester Request for Tuition Assistance” form (Appendix B), a “Tuition Assistance Check Request” form (Appendix C), itemized registration receipts, and a copy of the official grade(s) or proof of completion to the Human Resources Department. Credit card receipts and cancelled checks are not sufficient documentation of payments for tuition.

The “End of Semester Request for Tuition Assistance” form, a “Tuition Assistance Check Request” form, and all other required documentation must be submitted **within 45 calendar days** of the last session date. Tuition Assistance will be made only after proper documentation is submitted to the Training Division of Human Resources. Requests submitted more than 45

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calendar days after the last session date will not be eligible to receive Tuition Assistance and will be returned to the employee. Only those courses listed in the degree plan with the “Annual Request for Tuition Assistance Funds” form will be eligible for Tuition Assistance.

Employees who are participating in other educational support programs (i.e., scholarships, grants, etc.) shall be eligible only for assistance of costs not paid by the other programs

Any employee who receives Tuition Assistance and leaves city employment (due to voluntary or involuntary termination) shall repay the City all Tuition Assistance paid to them in the twenty-four (24) months prior to the last Tuition Assistance payment received. Repayment shall be according to the following schedule:

Termination within 0-12 months of Tuition Assistance received	Repay 100%
Termination after 12 months, prior to 24 months of Tuition Assistance received	Repay 50%

As a recipient of Tuition Assistance, the employee authorizes the City to deduct the balance owed for Tuition Assistance from his/her paycheck or any other final payments due to the employee. The employee understands that, if sufficient funds are not available to satisfy the Tuition Assistance owed to the City, the employee is legally obligated to pay the balance owed to the City by certified check, cash, or money order.

F. Tuition Assistance Review

Should a question arise about whether a request meets the requirements of this policy, (e.g., whether the school is properly accredited) or administration of this policy, the employee should contact the Training Division of Human Resources. The Human Resources Director or his/her designee shall determine whether the class and/or school's accreditation satisfies the City of Plano's requirement for assistance. The Human Resources Department's decision cannot be appealed.

Employees who fail to meet the objectives and criteria of the educational/degree plan are subject to termination from the Tuition Assistance program and/or denial of tuition assistance for that semester. If the employee is unable to fulfill the objectives of their degree plan, or requires

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a change in the criteria set forth in their educational degree plan, the employee must notify Human Resources and submit an updated degree plan through the process outlined in this policy.

III. Appendices

- A. [Annual Request for Tuition Assistance Funds](#)
- B. [End of Semester Request for Tuition Assistance](#)
- C. [Tuition Assistance Check Request](#)