



# City of Waukesha HR Policy

## D2 Education and Training Reimbursement

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### I. Purpose

The City of Waukesha is committed to maximizing the quality of service we provide to citizens and customers and increasing the expertise of our employees in areas that align with organizational needs. To this end, the City of Waukesha recognizes and desires that its employees seek training and educational opportunities to broaden their (and create new) knowledge, skills and abilities invests in employees' careers enabling them to obtain and retain the competencies essential to engage in problem solving, reform, and change through professional development opportunities.

### II. Summary

~~SECTION 1. WHEREAS, An employee's work performance is vital to the success of the City of Waukesha. In keeping with this philosophy, annually, the City will budget a centralized in the Human Resources Department budget a nonrenewable maximum calendar year budget cap in the amount of \$15,000 for technical college or university semester classes. These funds are the City budgets and assigns each department to be used, under general guidelines consistent with its mission, expressly for the purpose of job-related education and training that will challenge employees to higher levels of achievement and service. All training will be expressly for the purpose of job related education in order for it to be approved for reimbursement.~~

~~SECTION 2. WHEREAS, the City budgets and assigns each department an amount of money to be used, under general guidelines consistent with its mission, expressly for the purpose of job related education and training that will challenge employees to higher levels of achievement and service, (moved up)~~

~~SECTION 3. THEREFORE BE IT RESOLVED, that effective January 1, 2004 the following policy is adopted.~~

### III. Definitions

- A. **Eligible Employees:** Regular, full-time employees who have completed at least 6-months of employment.
- B. **Qualifying Programs:** Educational courses and degree programs.

### IV. Eligibility

- A. Employees are eligible for tuition reimbursement upon meeting the following requirements:
  1. Proposed course of study is a single course that is job related or is a course within a degree program that is either job related or will prepare the employee for another position within the City as approved by management.
  2. The course is offered by an accredited institution.
  3. Attendance will not conflict with the employee's work schedule.
  4. Employee's tuition was not covered by funds received from other sources (e.g., scholarships, grants, GI Bill).
  5. The manager, department head and HR approve the proposed course.



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6. Employee is actively employed at the City at the conclusion of the course and at the time payment is requested.

### V. Ineligible Expenses

- A. The following education activities are not covered by tuition reimbursement:
  1. Exam preparatory courses (e.g., for the LSAT or GMAT).
  2. Non-accredited college or university.
  3. Seminars, conferences, workshops, in-service training or certificate and license renewal.
    - (a) Annually, department heads will be responsible for making requests for department budget funding of job-related training for employees. **Departmental budgets may** cover training in the form of seminars, conferences, workshops, in-service training and/or obtaining or renewal of a certificate or license programs.

### VI. Reimbursement Process and Authorization

- A. City employees must seek approval from their immediate supervisor and department head to receive reimbursement for desired training or courses that are not required for their position. The request must include applicable course of study, purpose, job relevance, cost, dates, times of coursework/training and the name of the institution or source of training.
- B. Department heads will be responsible for determining which positions require continued education, training or maintenance of skills due to legally mandated, technical or operational changes occurring in a position. Department heads shall direct employees to attend ~~and process requests from employees for~~ job related training and authorize payment for such training.
- C. Department heads will be responsible for ensuring that employees successfully complete all approved training.
- D. Human Resources is responsible for processing requests from employees for job related credit classes and where appropriate, authorize reimbursement within this policy.
- E. The maximum amount annually available to an individual employee will be ~~\$1000.00~~. **\$2,000**.
- F. Employees are required to complete **an Education and Training Request Form**, obtain **signature from their department head**, and **submit** ~~have approved by~~ to Human Resources for **approval** ~~an Education and Training Request Form (attached)~~ **at least 15 30** days in advance of the official first day of the requested training or ~~semester~~ class.
  1. **The employee is responsible for paying their tuition and** must submit a receipt and grade report for each course to Human Resources at the completion of the class for reimbursement.
    - (a) **Employee must also submit a copy of the original fee statement showing breakdown of all charges.** No books, fees, travel, or **other miscellaneous expenses parking** will be reimbursed.
    - (b) Grade reports must **be dated and** show the name of the accredited college or university, the employee's name, course title, **and** grade awarded. ~~and be dated.~~



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- (c) Final grade reports must be submitted within 30 days of course completion. Any submissions received after 30 days will not be accepted.
- (d) Satisfactory ~~Successful~~ completion of a course is interpreted as at least a grade of "C" "B". which will be reimbursed at 75% or "B" which will be reimbursed at 100%. Any grade less than a "B" is not eligible for reimbursement.
- (e) The grade report or transcript must show a "Pass" rating for courses taken on a pass/fail basis.

~~All training will be expressly for the purpose of job related education in order for it to be reimbursement approved.~~ (moved up)

### VII. Payment and Reimbursement Recovery

- A. Job related training or attending of semester classes authorized by departments heads shall be paid by the City within the following conditions:
  - 1. Recovery by the City of education or training reimbursements shall not be required of an employee when they remain in the employ of the City for at least twelve full months from the date they complete any authorized education or training.
  - 2. The City requires recovery of fifty percent (50%) of the amount it reimbursed **through the tuition reimbursement process** for ~~education or training~~ expenses from employees who fail to remain in the employ of the City for at least twelve (12) full months from the date of completion of any authorized education or training.
  - 3. The City requires recovery of one hundred percent (100%) of the amount it reimbursed **through the tuition reimbursement process** for ~~education or training~~ expenses from employees who fail to remain in the employ of the City for at least six (6) full months from the date of completion of any authorized education or training.
  - 4. The City requires recovery of one hundred percent (100%) of the amount it reimbursed for ~~education or training~~ expenses for seminars, conferences, workshops and in-services from employees who fail to complete any education or training, regardless of the reason (e.g., withdraws or quits before completion, etc.).
- ~~B. Department heads will notify the Human Resources Department when a terminating employee has been reimbursed by the City for training and education during the preceding twelve (12) months so that appropriate reimbursement recovery is made from the employee.~~
- ~~C. This policy will be reviewed one year from renewal.~~
- D. **Any funds owed to the City for tuition reimbursement will be taken from the employee's final paycheck. If the check is not enough to cover the balance, employee will be invoiced.**

Passed this X day of MONTH, 2023.

Approved this X day of MONTH, 2023.



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Mayor

ATTEST:

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City Clerk