



City of Waukesha HR Policy
D2 Education and Training Reimbursement

WAUKESHA PUBLIC LIBRARY
HUMAN RESOURCES POLICY PROCEDURE

SUBJECT: <u>PURPOSE EDUCATION AND TRAINING REIMBURSEMENT</u>	<i>Issued:</i> <i>4/9/261/12/2</i>	<i>No: A-1D-2</i>
	<i>Supersedes:</i> <i>3/9/23</i>	<i>Page: 1 of 53</i>

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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 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

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 nonrenewable maximum calendar year budget cap in the amount of \$15,000 for technical college or university semester classes. These funds are to be used expressly for the purpose of job-related education and training that will challenge employees to higher levels of achievement and service.

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.



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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.
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 shall be submitted on the Education and Training Reimbursement Request Form and 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 job-related training and authorize payment for such training.



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- 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 \$2,000.
- F. Employees are required to complete an Education and Training **Reimbursement** Request Form, obtain signature from their department head, and submit to Human Resources for approval at least 15 days in advance of the official first day of the requested training or 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~~ **an itemized receipt** showing breakdown of all charges **and a copy of the academic calendar**. No books, fees, travel, or other miscellaneous expenses will be reimbursed.
 - (b) Grade reports/**transcripts** must be dated and show the name of the accredited college or university, the employee's name, course title, and grade awarded.
 - (c) Final grade reports must be submitted within 30 days ~~of course completion~~ **of the end of the semester as listed in the academic calendar**. Any submissions received after 30 days will not be accepted.
 - (d) Satisfactory completion of a course is interpreted as at least a grade of "B". 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.

VII. Payment and Reimbursement Recovery



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- A. Upon request for tuition reimbursement, employees will be required to sign off on a written or electronic agreement to remain with the City for one year from the date of the reimbursement. If the employee leaves within that year, they agree to repay the tuition in full through payroll deduction or personal payment to the Clerk/Treasurer's office.
- B. Job-related training ~~or attending of semester classes~~ authorized by department 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 ~~this tuition reimbursement~~ process for 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 ~~this tuition reimbursement~~ process for 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 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.).
- C. 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, **at the discretion of the City.**

~~Approved by the Council this X day of December, 2025.~~



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ATTEST:

 City Clerk