



City of Northampton, Massachusetts
Human Resources Department

POLICY & PROCEDURE
NUMBER 800-6

Effective Date: 10/16/89
Revision Date: 1/1/99

Educational Assistance

I. POLICY

The City of Northampton offers educational financial assistance and encouragement to employees who wish to further or expand their education or improve or maintain their skills in relation to their responsibilities with the City.

II. SCOPE

To be eligible for educational financial assistance, an employee must meet the following conditions:

- A.** At the time of application for assistance, the employee must have been a City employee in good standing for a minimum of twelve months and be scheduled to regularly work 20 or more hours per week for a minimum of 1040 hours per year; and
- B.** The employee must be an employee of the City at the time the official transcript(s) is produced in order to receive reimbursement; and
- C.** Attendance at any course(s) shall not conflict with the employee's work schedule; and
- D.** The employee must have no pending plans to resign their position with the City; and
- E.** The employee must agree to work for the City of Northampton for a period of one year after the completion date of the course or training for which financial assistance was received. Failure to do so will require that the employee reimburse the City for all educational financial assistance received in the twelve-month period prior to their date of discharge. Reimbursement may be deducted from the final paycheck.
- F.** Also, this policy does not apply to employees who are seasonal or temporary. This policy also does not apply to School Department, Smith Vocational, Forbes Library or Lilly Library employees or others who have other contractual agreements or budgetary discretion.

NOTE: *All educational financial assistance is subject to management discretion, City staffing needs, and the availability of budgeted funds.*

III. PROCEDURE

A. An eligible employee may request to participate in a formal educational/training program which is related to his/her current job responsibilities or reasonable career progression within the City provided:

1. The course of study is offered by an accredited public or private educational institution or by a professional training group or company.
2. If approved, reimbursement will be provided, pursuant to this policy, for courses/training which are:
 - a) Toward a degree and directly applicable to the employee's current job with the City (liberal arts courses and other electives which are part of a degree requirement but not directly applicable to the employee's job will not be included). Also, a final course grade of **C or better** must be achieved for undergraduate courses (**B or better** for graduate courses) in order to receive reimbursement; or
 - b) Unrelated to a degree but which are directly related to the employee's responsibilities with the City. The employee must successfully complete the training course/program and provide documentation of such in order to receive reimbursement ; or
 - c) Fundamental to a sound education, such as standard secondary school English or preparation for a GED. The employee must successfully complete the training course/program and provide documentation of such in order to receive reimbursement
3. Unless otherwise specified by contractual agreement, the conditions and the maximum amount of educational financial assistance an eligible employee may receive in a twelve-month period beginning **July 1 and ending June 30** in any year is as follows:
 - a) Employee scheduled to work regularly 35 hours or more per week (1750 hours/year minimum), the maximum financial assistance is \$500.00 (\$250.00 per course maximum);
 - b) Employee scheduled to work regularly 20 hours or more per week but less than 35 hours (1040 hours/year minimum), the maximum financial assistance is \$250.00 (\$125.00 per course maximum);
 - c) Educational financial assistance will be applied against the maximum for the fiscal year in which the course is completed.

d) There shall be no financial assistance applicable to any portion of tuition, cost of books, or fees for which an employee received payment as a result of a scholarship, grant, or educational credit as a veteran or a member of the Armed Forces.

NOTE: *Correspondence courses or courses entirely unrelated to the employee's City responsibilities such as hobby or social courses, are not eligible for reimbursement.*

B. Application Process: An employee initiates a request for educational assistance through their Department Head. Education reimbursement application forms are available from the Human Resources Department.

Note: *A Department Head may require that an employee participate in a seminar, workshop, or short course educational program that is directly related to departmental/City operations and may request that the employee be reimbursed pursuant to this policy. However, the Human Resources Director, or his/her designee, shall determine if it is more appropriate for the Department Head to pay for the training through his/her department's training budget.*

1. Pursuant to this policy, an **Educational Assistance Reimbursement Request Form (HRD 8)** must be submitted for review/approval *through* the employee's Department Head, or his/her designee, to the Human Resources Director, or his/her designee, for both college courses and for training programs prior to formal registration for the course or training program. This review process comprises the City's *Educational Assistance Review Committee*.

2. The request form (**HRD 8**) may be obtained from the Human Resources Department or from the Department Head or his/her designee. The employee will provide the following information on the form:

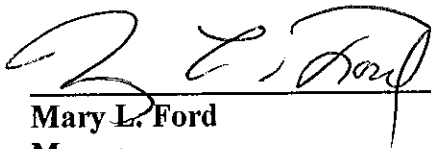
- a) The name of the course or training program;
- b) The degree or certification to be obtained, if applicable;
- c) How the course or training program is directly related to the employee's job responsibilities;
- d) The amount for which reimbursement is requested;
- e) The amount of educational financial assistance received or applied for from any other sources, if applicable;
- f) A copy of the course description or training program description provided by the college or organization offering the training.

3. The request form (HRD 8) will be reviewed by the *Educational Assistance Review Committee* and the employee will be notified of approval, or not, by either the employee's Department Head, or his/her designee, or by the Human Resources Director, or his/her designee as appropriate.
4. Upon completion of the approved course or training program, the employee must submit to the Human Resources Department within (30) days of completion of the course:
 - a) receipt(s) for which reimbursement has been approved; and
 - b) proof of the final grade or certificate of completion and/or any other documentation deemed appropriate by the Human Resources Director, or his/her designee, that indicates successful participation/attendance. *Note:* for GED or college undergraduate courses, a grade of C or better must be achieved (B or better for graduate courses) in order to receive reimbursement.
5. The department/City reserves the right to suspend or withhold approval for any course or training program applied for. Such discretion shall be exercised by the Educational Assistance Review Committee after evaluating relevant factors such as work conditions, availability of funds, and the employee's performance on the job.
6. In the event of an employee's economic hardship, the Educational Assistance Review Committee may elect to provide advance payment. This advance payment must be paid back to the City if the employee fails to successfully complete the course or training program as outlined above.

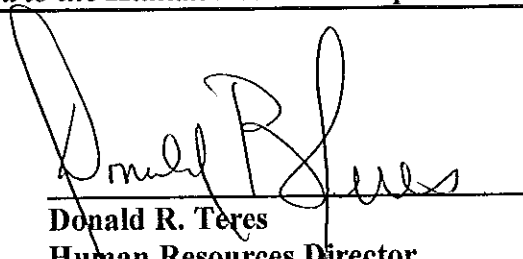
NOTE: *An employee's participation in a day, evening or weekend educational program not required or mandated by the department/City, is not compensable time.*

Any questions regarding this policy may be directed to the Human Resources Department.

Approved:



Mary L. Ford
Mayor



Donald R. Teres
Human Resources Director

Revision History:

Attachment: EDUCATIONAL ASSISTANCE REIMBURSEMENT REQUEST FORM (HRD 8)

EDUCATIONAL ASSISTANCE REIMBURSEMENT REQUEST FORM

Employee: _____ Date of Request: _____

Position Title: _____ Department: _____

Current Status: 35 hours or more per week 20 or greater but less than 35 hours per week
Applying For: Course (college) Training Program

Reimbursement approved/received to date this fiscal year (1 July thru 30 June): \$ _____
Educational Assistance Reimbursement Requested: \$ _____

1. Provide the name and description of the course or training program (provide/attach documentation):
2. Dates of course or training program: From _____ To _____
3. Is this part of a GED or college degree course of study? YES NO
a. If yes, how many credits have you received toward the degree to date (provide/attach documentation):
4. School or organization providing the course or training:
5. Describe how this course or training is **directly** job related (a copy of the course/training description must be attached):

VOLUNTARY ELECTION for receipt of Educational Financial Assistance:

I understand that if I leave the employ of the City of Northampton (voluntarily or not) within one year after accepting educational financial assistance, I am obligated to repay the amount of reimbursement I have received in the prior twelve months. I authorize the City of Northampton to deduct that amount from my final paycheck(s).

I understand that a receipt and documentation of the final grade for the course, or documentation of confirmation of successful completion of the training program, must be submitted before reimbursement will be processed.

Employee Signature: _____ Date: _____

*DO NOT WRITE BELOW THE LINE
CONTINUED ON BACK*

Educational Assistance Review Approval:

YES NO Department Head: _____ Date: _____

YES NO Human Resources Director: _____ Date: _____

Prospective amount allowed per Educational Assistance Policy: \$ _____

Note: The employee shall be notified in writing of approval/disapproval. Final Reimbursement Review/Approval:

Program completion/Course grade: _____

Reimbursement: \$ _____

_____ Date

HRD 8 (Copy of final grade or successful completion documentation must be attached before payment is processed)