

Town of Needham
Education Reimbursement Policy
Benefits Administration #501

1. PURPOSE AND SCOPE

The purpose of this policy is to set guidelines enabling employees to further their work-related educational pursuits.

2. APPLICABILITY

This policy applies to all non-represented, benefit eligible, General Government employees in Town Service whose employment is full-time or regular part-time. This policy is exclusive of those employees under the supervision and control of the School Committee.

3. DEFINITIONS

Refer to Policy #100 for definitions of commonly used words and phrases.

4. POLICY

- A. Employees shall be reimbursed for education expenses related to certificate programs, undergraduate and graduate programs. Course-required expenses eligible for reimbursement include but are not limited to tuition, course registration, books, fees, and related materials.
- B. All coursework must be work-related or must directly advance the professional development goals of the employee as specified in a performance evaluation, and will be considered so only under the discretion and prior approval of both the Department Manager and Director of Human Resources.
- C. Reimbursement will be dependent on the employee's receiving a passing grade; graduate level B- or better, undergraduate level C- or better. Reimbursement exceptions may be granted at the discretion of the Town Manager/designee.
- D. Employees may be reimbursed up to \$2,000 per course and up to \$4,000 per fiscal year. Education reimbursements will come from Departments' respective budgets and will be subject to department appropriation. The \$4,000 per employee per fiscal year maximum may be increased for extenuating circumstances, if requested in advance by the Department Manager and approved by the Director of Human Resources.

5. PROCEDURES

- A. **Pre-Approval** - To be eligible for reimbursement the employee must obtain pre-approval from the Department Manager and Director of Human Resources. The employee should submit the pre-approval reimbursement form and the course description to their Department Manager (with a copy to Human Resources). The Department Manager will review and make a determination that the course, degree or licensure being sought is work-related. The Department Manager will then submit the reimbursement form to the Director of Human Resources for review and final approval.
- B. **Reimbursement** - Upon course completion, the employee must submit to the Department Manager, the completed pre-approval form, an applicable expense reimbursement form, official transcript or document displaying course grade/satisfactory completion of the course, and receipt of payment for course registration or related expenses. The Department Manager will submit a PPAF with these materials to the Director of Human Resources for review and submission to the Accounting Division to be paid.

6. EXCEPTIONS

- A. The Town Manager has the discretion to interpret and make exceptions to this policy in the best interest of the Town.

Town of Needham - Education Reimbursement Policy #501
Pre-Certification of Work-Related Status – Education Reimbursement

Employee Name:		Employment Status:	<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time
Current Position:		Employee Group:	
Department/Division:		Department Manager:	
Name of Course and/or Program:		College/University:	
Course/Program Level:	<input type="checkbox"/> Certificate Program <input type="checkbox"/> Associates <input type="checkbox"/> Bachelors <input type="checkbox"/> Graduate		
Start and End Dates of Course: <i>(Ex: Jan 2018 – May 2018)</i>		Dates and Time of Course: <i>(ex: M,W,F: 6-9pm)</i>	
Describe how this course and/or program are work-related. <i>Course description and any relevant materials must be submitted with pre-approval form.</i>			
Anticipated Course and Course-Related Costs			
Course	Related Expense <i>(tuition, fee, equipment type)</i>	Anticipated Cost	
ANTICIPATED TOTAL COST:			
ANTICIPATED REIMBURSEMENT AMOUNT REQUESTED:			
Requesting Employee <i>I hereby certify that the above information is true.</i>			
	Print Name		
	Signature		Date
Required Pre-Approval			
Department Manager <i>Signature certifies that the course(s) listed above are work-related.</i>			
	Print Name		
	Signature		Date
Director of Human Resources			
	Signature		Date