



**TRAINING EMPLOYEES AND
REIMBURSEMENT FOR
EDUCATIONAL EXPENSES**

Effective Date: July 19, 2024

The Town of Oro Valley is committed to the development of a well-educated and highly skilled work force. To help accomplish this aim, the Town will provide training opportunities and educational assistance to employees, as defined in this policy.

SECTION 1 – TRAINING

- A. RESPONSIBILITY FOR TRAINING: The Town Council encourages the training of employees. Training programs may be initiated by the Town Manager or Department Directors. Such training programs may include seminars, demonstrations, assignment of reading material, or such other opportunities as may be available for the purpose of improving the effectiveness of job responsibilities or career growth.
- B. CREDIT FOR TRAINING: Participation in and successful completion of approved training courses may be considered in promotional opportunities. Evidence of training may be filed by the Department or the employee with the Human Resources Department.
- C. BUDGETING OF EXPENSES: Training programs and courses are to be budgeted directly by the individual Departments and are not the same as educational courses covered under the terms of Section II – “Reimbursement for Educational Expenses,” which follows.

SECTION II – REIMBURSEMENT FOR EDUCATIONAL EXPENSES

The objective of the Educational Reimbursement program is to encourage and assist employees in advancing their skills through outside schooling at recognized and accredited institutions of learning by providing reimbursement for a portion of the associated costs.

- A. POLICY: The Town of Oro Valley will provide tuition assistance benefits to help employees pay for the cost of accredited courses which are either related to their current job, or to other jobs which present logical career paths within the classification system used by the Town of Oro Valley. Pursuit of courses or degrees which are not directly related to an employee’s current position, or logical career path within the Town’s classification system, will be approved on a case-by-case basis by the employee’s Department Director and the Town Manager. Tuition reimbursement is subject to the availability of funds approved each fiscal year.
- B. ELIGIBILITY – Fulltime employees who have completed their introductory period with the Town are eligible to participate in this program. (Only courses which commence after the completion of the introductory period are eligible for reimbursement.)
- C. COURSE CRITERIA: The following types of courses are reimbursable under the terms of this program:
 - 1. Undergraduate and graduate courses offered through colleges, universities, and technical schools which are accredited by nationally recognized accreditation organizations are reimbursable if approved in advance of the class start date by the employee’s Department Director and the Human Resources Department. The Town’s decisions on the accredited status of the institution will be final in all cases and that decision is not appealable. All



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- courses must be “for credit” and must yield letter grades (or “pass-fail” grades) within the curriculum guidelines for the school attended.
2. Professional certification programs which are not required by the employee’s current position but may serve to prepare the employee for increased responsibility in their current job, or to other jobs which present logical career paths within the classification system used by the Town of Oro Valley. Pursuit of professional certifications which are not directly related to an employee’s current position, or logical career path within the Town’s classification system, will be approved on a case-by-case basis by the employee’s Department Director and the Town Manager. The availability of funds for the reimbursement of professional certification registration and testing is subject to the availability of funds approved each fiscal year.
 3. Employees who are interested in participating in programs not covered by this policy, including employer-directed programs, accelerated degree programs, or programs held during regular working hours, should contact their Department Director or Human Resources Director to determine if additional consideration of the course or program is possible.

D. REIMBURSEMENT BASIS:

1. The cost of registration fees, tuition, required reading material, and required lab fees are eligible for reimbursement. (Other special fees are the responsibility of the student and are not reimbursable under this policy.) Appropriate documentation of the “required” nature of covered fees must be provided.
2. Regardless of the school attended, reimbursement will be limited to the lesser of: (1) the actual costs, or (2) the IRS established limit for tax-free employer educational assistance (currently \$5,250).
3. A grade of “C” (or its numerical equivalent), or better must be attained to receive reimbursement. No reimbursement will be received for grades of “incomplete” or for withdrawals (unless requested by the Town of Oro Valley for bona fide work-related situations). Generally, “Pass/Fail” grades are only acceptable if the course is part of an approved degree program for the student, and the “Pass/Fail” will apply to the graduation requirement.
4. For professional certifications, evidence from the certifying organization that the employee has been granted a professional certification.

E. OTHER REQUIREMENTS:

1. All courses must be pre-approved by the Department Director and Human Resources Director prior to commencement of the course. Employees are advised that they should not register for the course until the appropriate approvals are obtained. (Contact the Human Resources Department for the necessary forms and current procedures).



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2. The student must be an eligible employee of the Town of Oro Valley at the time of completion of the course, to receive reimbursement.
3. Employees are expected to attend courses using their own time, unless approved by the Department Director to do otherwise. (All such situations require the advance approval of the Town Manager prior to registration.)
4. The Town of Oro Valley will comply with all Federal, State and local tax laws.
5. The amount of reimbursement for courses taken will be offset by amounts received from other forms of financial aid, such as scholarships.
6. Employees are required to re-pay a pro-rated share of any payments made under this policy if the employee separates from service within 365 days from the date of payment. For example, the employee separates 219 calendar days after the last reimbursement payment. The employee will be required to repay 40% of the final payment (365 days – 219 = 146, then divided by 365 to determine percentage). In order to participate in the program, the employee must agree in writing to deduct any repayment from the final paycheck, or if the final paycheck is not enough, to continue repayment after employment.