



## PERSONNEL POLICY

### SUBJECT: EDUCATION ASSISTANCE PLAN AND CAREER INCENTIVE

DATE: February 15, 2017

Number: 307-16

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#### **I. Statement of Policy**

It is the policy of Fulton County Government to encourage the career growth, education and development of its employees. To help achieve this goal an Education Assistance Plan and Career Incentive Program has been established. Employees are encouraged to take advantage of educational and training opportunities which increase their knowledge and skill in their present jobs, or to prepare them for specific career goals within their departments, or within Fulton County Government at large.

Fulton County will either pay a bonus to an employee who obtains a degree or professional certifications in a field of study directly related to improvement of knowledge and skills in the employee's current job or reimburse an employee for tuition, fees, and books for courses taken that are directly related to improvement of relevant job skills with the County. The Educational Assistance Plan is not an employee benefit, right or entitlement. Denial of participation in the Educational Assistance Plan and Career Incentive Program is not subject to the grievance process.

This plan shall be administered without regard to race, color, sex (including pregnancy), gender identity, age, religion, national origin, disability or genetic information, military status or political affiliation.

#### **II. Background and Applicability**

All permanent, full-time County employees shall be eligible to participate in the education assistance plan provided that employees meet certain eligibility requirements and obtain approval from the appropriate Appointing Authority.

#### **III. Establishment and Implementation of Procedure**

The County Manager, in consultation with the Chief Human Resources Officer and the County Attorney, is authorized to establish and modify, as needed, a procedure for implementing this policy.

These policies do not create a contract of employment. Employment for non-classified employees remains "at will".



## PERSONNEL PROCEDURE

### SUBJECT: EDUCATION ASSISTANCE PLAN AND CAREER INCENTIVE

DATE: November 1, 2018

Number: 307-16

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#### I. Definitions

- A. Educational Assistance Plan for Employees: This program shall be known as the “Educational Assistance Plan for Employees.”
- B. Successful Completion: Successful attainment of a professional certification or completion of a course, degree or certification program in accordance with minimum performance standards, or better, recognized by the sponsoring institution for the degree or certification pursued (generally, a “Satisfactory,” “Pass,” or a grade of “C” or higher grade for undergraduate study and a “B” or higher grade for graduate study). Courses must be completed. Audits and withdrawals are not eligible for reimbursement. “Incomplete” courses shall not be reimbursed until a final grade is issued.
- C. Accredited Institution:
- An institution of learning recognized by one of the national or regional accrediting agencies for colleges and universities or the state university system for unconditional admission to graduate school or for full transfer credit;
  - A city, county or state-supported community or junior college whose credits will transfer to the University System of Georgia for full credit on a provisional or unconditional basis;
  - Institutions of learning offering off-campus guided study programs and correspondence courses individually approved by the County Manager or designated representative(s); or

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- Professional and technical associations and societies, trade unions and other organizations offering formal, certificated programs of training and education for members and non-members, individually approved by the County Manager or designated representative(s).
- D. Licensure: A state's grant of legal authority to practice a profession within a designated scope of practice.
- E. Certification Program: A training program on a specialized topic for which participants receive a certificate after completing the course and passing an assessment instrument.
- F. Professional Certification: A standardized process that enables an individual to demonstrate a certain level of competency in a specific career or job function. Upon completion of professional certification requirements, which typically entail passing an exam administered by an industry specific credentialing organization, a certification credential is awarded. Professional certification holders must complete continuing education requirements to retain the credential.
- G. Tuition: The fee for instruction and lab fees only at an accredited institution. Tuition does not include transportation costs or room and board.

## **II. Qualifications**

Any employee who takes an approved course may, upon successful completion of the course, qualify for reimbursement of tuition expenses, fees, and the costs of textbooks in an amount up to, but not to exceed either \$5,000 per calendar year or a lifetime cap of \$35,000. (This cap also applies to rehires). Employees receiving financial assistance including scholarships, fellowships, grants, and/or Veteran's benefits, will be eligible for reimbursement after the financial assistance has been applied to the tuition expenses and other school-related costs.

## **III. Employee Eligibility**

All permanent, full-time employees who have completed their probationary period (if applicable) shall be eligible for participation provided that the following requirements are met:

- Completion of 13 pay periods of full time employment with Fulton County;

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- An overall evaluation of “satisfactory” or higher on the latest employee performance evaluation preceding the beginning of classes, if the employee is in a department that regularly evaluates employee performance;

**Exception: An employee whose latest overall evaluation is less than “satisfactory” may be eligible for Tuition Refund for coursework that relates to specific areas of weak performance.**

- Full-time, permanent employees on educational leave without pay or reduced work hour schedules may participate to the extent other eligibility criteria are met.
- Employees assigned to grant funded positions are not eligible, unless the grant has funded this benefit.

#### **IV. Eligibility of Coursework**

Guidelines for establishing eligible coursework are as follows:

- Degree and certification programs at accredited institutions which relate directly to the employee’s present position, a position into which the employee may reasonably be expected to advance or transfer in the future, or other career opportunities within Fulton County Government are eligible for approval. Each department head shall provide the Department of Human Resources Management with a list of pre-approved professional certifications or degree and certification programs that shall be eligible for reimbursement.
- For those employees who have been approved for a degree program, all general education courses eligible for credit towards completion of the degree program and graduation as required by the school will be approved.
- All courses must be taken outside of scheduled working hours unless the employee’s Department Head or Appointing Authority permits the employee to work a flex-time or a compressed workweek or approves the use of vacation leave, compensatory time, or holiday leave. If Administrative Leave is granted to take a course during working hours, no tuition reimbursement will be granted.
- For on-line and Internet courses and programs at accredited educational institutions, the Employee Development Division of the Department of Human Resources Management will review requests for reimbursement on a case-by-case basis. The Employee Development Division must receive such requests at least 30 days prior to the start of the course or program.

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- The Educational Assistance Plan is designed to assist employees pursuing a degree or professional certification. It is not intended for those interested in only one course, non-degree college training, workshops, or seminars.
- Training or courses required and paid for by the County are not covered under this program.
- Courses started prior to employment shall not be considered for tuition reimbursement; however, an employee may be eligible for an Educational Achievement Bonus upon completion of a degree or certification program that the employee began prior to employment.

## **V. Responsibilities**

This program shall be administered by the Department of Human Resources Management. The employee's Appointing Authority/Department Head, the Chief Human Resources Officer or designee shall provide the employee with educational and career counseling as needed to meet program and eligibility criteria and objectives.

Additional specific responsibilities under this policy are assigned to County departments and agencies as specified below:

### **A. Department of Human Resources**

The Chief Human Resources Officer shall be responsible for maintaining a record of all employee educational accomplishments and all educational leave under this program. The Department of Human Resources' Employee Development Division shall maintain program oversight responsibilities including:

- Resolving any problems or discrepancies with the interpretation of this Procedure;
- Reviewing all supporting documents submitted by departments to ensure proper accountability for reimbursement disbursement;
- Calculating the reimbursement due;
- Approving and submitting all reimbursement requests for final disbursement;
- Resolving problems and issues affecting the program.

The Chief Human Resources Officer may also grant extensions for the completion of course work for medical and/or military reasons.

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## **B. Department Heads/Appointing Authorities**

The Appointing Authorities and Department Heads shall be responsible for verifying that all approved coursework is in compliance with this Procedure, as well as all other aspects of the program. Appointing Authorities and Department Heads shall approve or disapprove all reimbursements for degrees, programs, and coursework for employees within their departments in accordance with this Procedure.

In addition, Appointing Authorities and Department heads are responsible for expending funds for tuition reimbursement and other education activities within the confines of their existing budgets. In instances approved by the County Manager, the Finance Department may allocate resources to supplement a department's budget.

## **C. Department of Finance**

The Department of Finance shall be responsible for disbursing all reimbursements and maintaining supporting documentation confirming costs.

## **VI. Reimbursement**

Unless otherwise indicated in this Procedure, any employee desiring to participate in the Education Assistance Plan shall submit an application for coursework, degree or certification program approval to their Appointing Authority or Department Head no later than thirty days prior to the start of classes. Employees pay the required tuition and fees and are reimbursed for the costs when the course is completed and appropriate documentation is submitted.

### **A. Coursework Degree Review and Approval**

The Appointing Authority or Department Head shall approve or disapprove the employee's request after verifying the employee's eligibility for participation in the Education Assistance Plan. Participation in certification programs may be denied by the Appointing Authority for valid business reasons including budget and job relatedness.

If the Appointing Authority or Department Head approves the request, a copy of the original application is sent to the Department of Human Resources Management for final approval. Once approved, a copy will be returned to the employee to inform them of the approval. If the Appointing Authority or Department Head disapproves the application, he or she shall advise the employee of the reason for the rejection within twenty (20) business days of receipt of the application.

### **B. Conditions and Limitations**

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Educational assistance is neither a guaranteed benefit nor an entitlement of employment with Fulton County, and is limited by the availability of funds. Approved applicants shall submit a request for reimbursement, along with tuition receipts or other proof of payment, official grade notifications, and all supporting documentation, to their Appointing Authority or Department Head no later than thirty days from the receipt of grades for completed coursework. The Departments shall submit to the Department of Human Resources Management's Employee Development Division all applications, whether approved or disapproved, with the supporting documents for final review and reimbursement approval.

An employee is responsible for notifying the Department of Human Resources in writing of any changes in coursework or the amount of tuition or fees paid. If an employee receives an overpayment for reimbursement of their tuition, they will be required to reimburse the County.

Should an employee submit documentation that the employee knows is false or intentionally misleading in order to receive benefits for which the employee is not entitled, the employee will be deemed ineligible to continue to participate in the Education Assistance Plan and must repay Fulton County for any tuition reimbursements received while employed by Fulton County. The employee also may be subject to disciplinary action, including, but not limited to, dismissal from Fulton County's service.

Attendance at a pre-approved class is not part of an employee's job duties. Transportation to classes is the responsibility of the employee. Employees may not use County cars to commute to classes and will not receive reimbursement for travel expenses. Homework is not allowed to be done during work time.

### **C. Termination of Eligibility**

Eligibility for the Education Assistance Plan shall cease when an employee separates from employment. Employees who are already taking a course at the time of separation will not be eligible for the reimbursement of tuition costs for that course.

## **VII. Educational Achievement Bonus**

In lieu of receiving tuition reimbursement as part of an Education Assistance Plan, an employee may apply to receive a one-time Educational Achievement Bonus under the following circumstances:

- (1) The employee completed a degree or certification program or attained a professional certification from an accredited institution in a field of study directly related to improvement of knowledge and skills in the employee's current job on or after January 1, 2017;

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- (2) The employee meets the Employee eligibility criteria outlined in Section III of this procedure and, on the effective date of this procedure, is in the last year of a degree program in a field of study directly related to improvement of knowledge and skills in the employee's current job. Upon completion of the degree program, the employee may be eligible for an Educational Achievement Bonus.

Employees meeting the criteria under this provision will be required to submit an application, along with an official transcript and/or copy of the degree or certification earned, for bonus payment to their Appointing Authority or Department Head. The deadline for submission of applications for the Educational Achievement Bonus is June 30. The Appointing Authority or Department Head shall approve or disapprove the employee's request after verifying the employee's eligibility for participation in the Education Assistance Plan. The Departments shall submit to the Department of Human Resources Management's Employee Development Division all applications, whether approved or disapproved, with the supporting documents for final review and reimbursement approval.

An Educational Achievement Bonus may be paid in four (4) equal installments over a four (4) year period of time or as a one-time bonus. The Educational Achievement Bonuses for each fiscal year shall be paid no later than December 31.

Provided sufficient funds are set aside for the Education Assistance Plan or available within the department's budget, Educational Achievement Bonuses will be paid in accordance with the following table, which may be modified from time to time by the County Manager in consultation with the Chief Human Resources. If sufficient funds are not available, the County Manager, Chief Human Resources Officer, and Finance Director will meet to discuss whether to reduce the amount of the bonus or to delay some or all of the payments until the next fiscal year in which sufficient funds are available.

<b>Accredited Degrees</b>		
<b>Degree level</b>	<b>Amount</b>	<b>Payment period</b>
Associate's Degree:	\$4,000	2 years
Bachelor's Degree:	\$8,000	4 years
Master's Degree:	\$12,000	4 years
Doctoral Degree (i.e., doctor of philosophy, doctor of jurisprudence, doctor of medicine and doctor of medical dentistry or dental surgery):	\$15,000	4 years
<b>Certifications/Licensure</b>		
<b>Type:</b>	<b>Amount</b>	<b>Payment period</b>
Completion of Certification Program:	\$2,000	Same year
Professional Certification:	\$4,000	2 years
Licensure:	\$6,000	2 years

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An employee **will not** be eligible to receive an Educational Achievement Bonus if possession of the degree, license, certification or professional certification was previously used as the basis for the employee to receive a higher than minimum salary upon appointment to the employee's current position.

## **VIII. Records**

All documents relating to this plan, including originals or copies of certificates, certifications, diplomas or transcripts demonstrating employee educational efforts and accomplishments shall become a part of the employee's permanent file in the Department of Human Resources Management, and the Chief Human Resources Officer and Appointing Authorities shall consider educational achievements and accomplishments in rating and assessing employees for purposes of promotion and transfer.

## **IX. Service Commitment**

All employees receiving reimbursement or other assistance under this program will be required to enter into a written service agreement committing to remain in the employ of Fulton County for a minimum of one (1) year following reimbursement or payment of an Educational Achievement Bonus upon completion of coursework or the certification program and/or attainment of a professional certification. Fulton County shall be authorized to recoup money paid to an employee toward educational assistance if the employee separates from Fulton County prior to the expiration of this period. Deductions will be made from the employee's final paycheck to the extent possible. If the final paycheck is insufficient, the employee will still be responsible for reimbursing the County. No reimbursement will be required, however, of those employees who have been laid off and have been previously approved for coursework. If an employee passes away, no reimbursement will be required from either the family or estate of the employee.

## **X. Income Tax Information**

The taxability of the Education Assistance Plan is determined by federal regulations and is subject to change. The use of tuition reimbursement may affect your taxable income. For more information, please consult with a tax advisor. If the benefits are considered taxable during a tax year (i.e., January 1 to December 31), federal law requires that they be reported by Fulton County as taxable income to the employee.

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## **XI. General Information**

Fulton County reserves the right to terminate, suspend, restrict, withdraw, amend or modify the Education Assistance Plan in whole or in part at any time based upon the availability of funds or for any other business reason as determined by Fulton County.

Where applications exceed available funds, actions such as the following may be taken:

- Fulton County may select employees whose learning needs are critical to the County;
- Fulton County may set an official, uniformly applied percentage figure as the amount of tuition reimbursement for which Fulton County is responsible;
- Fulton County may reject any and all applications for tuition reimbursement;
- Fulton County may distribute available funds equally among eligible employees or reduce the maximum reimbursement per person.

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