

**Town of Cary  
STANDARD PROCEDURE**

**TUITION ASSISTANCE PROGRAM**

Standard Procedure No. 50  
Effective: 7/1/07  
Supersedes: 3/27/06  
Prepared by: Valiria C. Willis  
Title: Human Resources Director  
Approved by: *William B. Coleman, Jr.*  
Town Manager

**PROCEDURE PURPOSE**

This standard procedure implements Section 2-92(e) of the Personnel Ordinance whereby the Town provides assistance for employees who wish to improve job skills and performance or prepare for promotional opportunities within the Town service.

**Definitions**

1. Eligible Employees - All full-time employees who have completed initial probation will be eligible to apply for financial assistance under this program.
2. Eligible Courses - An eligible course is one which will either improve the employee's ability to perform his/her present job or will help prepare the employee to advance.
3. Eligible Expenses - Tuition, registration fees, laboratory fees, and student fees from an accredited college/university are the eligible reimbursement items. Books, special equipment, tools, and miscellaneous supplies such as pencils and paper are not reimbursable expenditures. The Town will not duplicate funding for employees who are receiving educational financial assistance from another governmental source, e.g., Veteran Administration benefits. However, if an employee is receiving funds from another source which does not cover all the expenses, the Tuition Assistance Program will help defray the balance of the expenses as provided for in Part 4.
4. Reimbursement Limitations - Employees may be reimbursed up to a total of \$1,220 for eligible expenses in any fiscal year beginning July 1 of one year through June 30 of the following year.

Reimbursement for expenses shall be limited to three courses per semester, quarter, or session.

5. Successful Course Completion - Successful course completion will be a grade of "C" or better when grade letters are given. In graduate school courses a grade of "B" or "P" or better is required. Otherwise, as in the case of Pass/Fail courses, or in courses when no grade is given, a written statement of successful completion from the instructor will document successful completion of a course.

## **Application Procedure**

- A. Interested employees must obtain and complete a Tuition Assistance Program Application (see attachment).
- B. Prior to registering, the employee must submit the application to his/her supervisor who will, in turn, submit it to the Department Director for approval.
- C. If approved, the Department Director will then submit the application to the Human Resources Department for approval. If the Department Director does not approve an application, the employee may request the reasons for not approving the application from that Director.
- D. If the Human Resources Department approves the application, a Refund Certificate will be issued to the employee. The employee shall keep a record of all his/her expenditures on the Refund Certificate. If the Human Resources Department does not approve the application, a reason will be provided to the employee.

## **Reimbursement Procedure**

- A. After successful course completion, the employee should complete the Refund Certificate issued by Human Resources, listing all eligible expenditures. Receipts for all expenditures must be attached to the form along with an official record of his/her course grade.
- B. The employee then forwards the completed Refund Certificate to the Human Resources Department within 30 calendar days of completion of the course or two weeks prior to the end of the fiscal year, whichever comes first.
- C. After verification of reported expenses, the Town will reimburse the employee the expenses for which he/she is eligible.

## **Conditions and Agreement**

Because the Town expends resources in helping employees with tuition costs, employees should use their newly acquired training in service to the Town. Thus, an employee must agree to remain employed for six months following the date of reimbursement or repay the Town for the amount of the reimbursement. Employees who are reduced-in-force (laid-off) are exempt from repayment.

**TOWN OF CARY  
TUITION ASSISTANCE PROGRAM APPLICATION**

NAME: \_\_\_\_\_  
LAST
FIRST
JOB TITLE

DEPARTMENT: \_\_\_\_\_ DIVISION: \_\_\_\_\_ OFFICE PHONE: \_\_\_\_\_

**EDUCATIONAL BACKGROUND:      CIRCLE HIGHEST GRADE COMPLETED:**

Grade School                      High School                      Technical/Community College                      College  
 1 2 3 4 5 6 7 8                      9 10 11 12                      1 2                      1 2 3 4 ( )

\_\_\_\_\_  
 Name of Institution (last attended)                      Major Subject                      Degree/Cert./# of Semesters/Credits

I hereby submit the following course for approval under the rules of the Tuition Assistance Program offered by the following college/university:

\_\_\_\_\_  
**Name of Institution**

COURSE TITLE	CREDITS/ UNITS	DATE BEGINS	DATE ENDS	COSTS			
				REGISTRATION	TUITION	STUDENT LAB FEES	GRAND TOTAL

1. Graduate course?     Yes                       No
2. I am working toward:                       Certificate     Degree     Credit only in area of \_\_\_\_\_
3. Name of certificate or degree: \_\_\_\_\_

**Note – please notify the HR Department once a degree/certification/etc. has been achieved. Thank you!**

4. State briefly why you believe this course will help you in your present job or prepare you for career advancement with the Town in your current occupation.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

I understand that if my application is approved, the Town of Cary will refund 100% of the costs of registration, tuition, and lab fees, not to exceed \$1,220 in any one (1) fiscal year, upon my completion of the course and certification that my grade meets the standards of the program. I agree to remain employed with the Town for six (6) months following reimbursement. I also understand that should I leave the Town's employment, for reasons other than reduction-in-force, within six (6) months of being reimbursed for the above course, I must repay the Town the amount of this reimbursement. By my signature I authorize payroll deduction should this happen.

**APPLICANT'S SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**APPROVED/NOT APPROVED:** Department Director: \_\_\_\_\_ **DATE:** \_\_\_\_\_

**APPROVED/NOT APPROVED:** Human Resources: \_\_\_\_\_ **DATE:** \_\_\_\_\_

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## **OBJECTIVE OF TUITION ASSISTANCE PROGRAM**

The objective of this program is to encourage full-time, regular Town employees, who have completed initial probation, to take course work which will improve their performance in their present position(s) and/or help prepare them for positions of higher responsibility within their current occupations.

## **SCHOLARSHIP STANDARDS REQUIRED FOR REFUNDS**

Following are the standards necessary in order to qualify for the allowable refund of educational costs:

<b>SYSTEM</b>	<b>STANDARD</b>
A, B, C, D, E, (F)	C or better (undergraduate) B or better (graduate)
L (Low), P (Pass), H (High)	P or H
Pass, Fail	Pass
Satisfactory, Unsatisfactory	Satisfactory

## **INSTRUCTIONS FOR APPLICANTS**

1. **Prior to registration**, submit one (1) copy of the completed application to your supervisor and your supervisor will transmit it to your Department Director. **A separate application must be submitted for each course. (Limit: 3 concurrent courses/Maximum reimbursement - \$1,220 per fiscal year).**
2. Applications submitted after registration has been completed will not be approved.
3. If approved, the application will then be forwarded to Human Resources.
4. Notice of approval will be mailed to you together with the Refund Certificate. If the application is not approved, a reason will be provided.
5. After the course has been successfully completed, you are responsible for completing the refund certificate and attaching a copy of the official grade report. The certificate **must be returned within 30 calendar days of completing the course** or your reimbursement will be canceled.
6. The completed refund certificate should be given to the Human Resources Office together with receipts for all refundable expenses. Documentation will then be sent to the Finance Department for the amount of refund due and the reimbursement will be directly deposited into your account on file with Finance.