

TAB 5

POINT PAPER

City Commission Policy #09-01 Training Reimbursement Policy

Problem: The City does not have a policy in place to govern reimbursable expenses for job-related training.

Background: The City currently has a policy in place governing tuition reimbursement for educational courses that employees complete (i.e., college level courses where a grade is issued). During FY 2009 budget discussions, Commission asked staff to develop a policy outlining the guidelines for reimbursing employees for job-related training. The attached policy 09-01 outlines the guidelines for employee eligibility, reimbursable expenses, approval process, and re-payment associated with job-related training. The guidelines for employee advancement are also addressed in the policy.

Alternatives:

- 1 – Take no action
- 2 – Approve Policy 09-01

Recommendation: Staff recommends Alternative #2.

Budget Impact: The FY09 budget contains dollars associated with job-related training. To the extent approved training request are within budget, there will be no additional impact. Requests that exceed budgeted amounts will be brought back to Commission via a budget amendment.

**City of Palmetto
City Commission Policy 09-01**

Training Reimbursement Policy

Overview:

The City currently maintains a separate policy governing tuition reimbursement for City employees. Educational institutions including, but not limited to, community colleges, 4-year colleges or technical institutes whereby a grade is issued as part of completing a course will be governed by the Tuition Reimbursement Policy.

Additional training, certifications, instruction or education (hereby referred to as "training") which is not required for the job, but is still considered job-related will be governed by this policy.

The City of Palmetto understands the importance of training and encourages employees to obtain such knowledge that will allow them to become more effective and efficient in their job.

Eligibility:

- The training being sought must be related to an employee's job and will allow the employee to perform assigned duties more efficiently and effectively.
- Only full-time employees are eligible to seek advancement/reimbursement of eligible costs associated with applicable training.
- The appropriate Department Head will make the final determination as to whether or not the proposed training is related to the job and eligible for advancement/reimbursement, subject to available budget in each department/cost center.

Expenses eligible for advancement or reimbursement by the City:

- Registration Fees
- Exam Fees
- Hotel and Lodging
- Mileage
- Meal Per Diem
- Books and supplies related to training
- Items not listed are subject to Department Head approval and budgetary constraints

Other Guidelines:

- Employees who desire to attend training as described in this policy must complete an application for job-related training and have it signed by the appropriate Department Head. Once signed, it should be forwarded to the Human Resources Department for inclusion in the employee's personnel file.
- If an employee leaves the City within two years after receiving payment for any advancement/reimbursable expenses associated with training as defined above, the employee will be required to reimburse the City for 100% of the costs and expenses paid by the City. Reimbursement may be remitted by cash or check to the Human Resources Department or may be payroll deducted from employee's final paycheck.

- If an employee is required to retake a portion of training, the employee will be responsible for all associated costs.

Completion:

- Any training obtained or received by an employee remains with the employee. Employees who receive training increase their knowledge base and ability to perform their job at the highest level.
- Upon completion of the training, there will be no automatic increases in step or grade for an employee.
- Any training received by an employee may be taken into account during the annual review process.

DRAFT

(Job-Related Training)

Employee Name: _____

Department: _____

Cost Center: _____

Submission Date: _____

Type of Training: Class Instruction Test/Certification

Title of Training/Certification: _____

Sponsoring Organization: _____

Location: _____

Dates and Time of Training: _____

Eligible Expenses to be reimbursed:

Tuition/Registration Fee Books/Material Meals Lodging Mileage Exam Fee

Total Estimated Cost to Attend: _____

Budget Acct# to be used: _____

Other Relevant Factors to Consider: _____

Approved by (Dept Head Signature Required): _____

Date Approved: _____

Signed applications must be submitted to HR prior to submitting for reimbursement. The signed application should also be submitted with your A/P check request.