



Administrative Regulations

Office of the Mayor

Title: TUITION ASSISTANCE POLICY

A.R. Number: 7.6 **Effective Date:** 7/1/2023 **Page:** 1 of 5

Supersedes: TUITION ASSISTANCE POLICY **A.R.:** 7.6 **DATED:** 2/1/2007

I. PURPOSE

It is the policy of the City of Richmond to encourage city employees to develop in their field of work and maintain a high level of job performance. The city's tuition assistance program is a benefit designed to attract and retain a premier workforce. It helps the city invest in existing talent, expand the range of knowledge, skills, and abilities employees possess, and enhance the quality of services the city provides. The program provides assistance for approved coursework contingent on annual funding availability.

Tuition assistance is a citywide program. Changes to the program may not be made without the express approval of the Director of the Department of Human Resources (HR) and the Chief Administrative Officer (CAO).

II. POLICY

A. Eligibility

1. Employees. Permanent and full-time or part-time benefits-eligible employees may apply for tuition assistance. Employees must have successfully completed their twelve (12)-month probationary period with a satisfactory performance evaluation.
2. Courses. Courses must be taken through an accredited U.S. institution of higher education or technical or vocational center. Workshops, seminars, or city-sponsored training programs are not eligible.
3. Expenses. Tuition costs only are eligible for assistance or reimbursement. Textbooks, learning aids and materials, university fees, laboratory fees, technology fees, transportation, parking, and/or activity fees are not reimbursable.

B. Funding

Tuition assistance shall be administered on a first-come, first-serve and course by course basis, contingent upon annual appropriation of funds. Tuition assistance may be provided through reimbursement or upfront assistance in cases of demonstrated financial hardship. Tuition assistance shall not be approved unless funding exists. If funds are exhausted for the year, tuition assistance shall stop prospectively until funding is refreshed. Funding for the program is subject to the final approval of the CAO.



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C. Overall Conditions of Assistance

1. Assistance shall be approved according to maximum limits per employee determined by HR in consultation with the CAO.
2. If an employee is receiving educational benefits such as scholarships or other forms of tuition assistance, the employee must first exhaust those sources before applying for assistance from the city. City-provided assistance shall not exceed the difference between the amounts paid under the other resource and the total cost of the course(s).
3. The tuition assistance program shall be administered in accordance with Internal Revenue Service Code Section 127.¹ Employees are responsible for paying any required tax on assistance over the IRS maximum.
4. Employees must maintain employment with the City of Richmond for two full years following completion of the last course. If an individual leaves city employment within two years of completing the coursework for which the city funded tuition under this program, the individual shall repay all funds received through the program in full.

D. Conditions of Reimbursement

1. Employees must earn a grade of "C" or better for undergraduate courses, a "B" or better for graduate courses, or a "pass" in pass/fail courses to be eligible for reimbursement.
2. Reimbursement will not be made for any courses that did not receive prior authorization as stated in this policy.
3. Reimbursement will not be made for any dropped courses or course changes.
4. An individual who leaves city employment prior to receiving payment for requested tuition forfeits payment of the requested funds.

¹ See 26 U.S.C. § 127, Educational assistance programs: <https://www.law.cornell.edu/uscode/text/26/127>



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E. Conditions of Upfront Assistance

1. Eligible employees can apply for upfront tuition assistance. Upfront tuition assistance means that funds will be provided by the city in advance to cover authorized tuition costs as opposed to the employee being reimbursed for tuition expenses.
2. To qualify for upfront assistance, employees must demonstrate financial hardship. Approval for upfront assistance shall be at the discretion of the HR Director or designee.
3. Employees must complete the approved course and earn a grade of "C" or better for undergraduate courses, a "B" or better for graduate courses, or a "pass" in pass/fail courses. If the employee does not complete the approved course at the required grade level, any and all upfront assistance provided shall be repaid to the city in full.

III. PROCEDURE

- A. Tuition assistance must be approved at least thirty (30) days before the beginning of the semester. Applications that are not submitted in a timely manner shall be denied.
- B. Applicants must complete and submit all HR-required tuition assistance program forms and provide them to the appointing authority and/or department head for approval. The appointing authority and/or department head shall review the proposed coursework to determine that it serves a professional benefit to the employee, would not interfere with position responsibilities, and that the employee meets the program requirements.
- C. The appointing authority and/or department head shall forward the request to HR for review and HR Director approval.
- D. Upon course completion, the employee shall provide the appointing authority and/or department head and HR with the official transcript and documentation of course hours, tuition cost after any scholarships or other tuition assistance, and final grade along a copy of the approved application within thirty (30) calendar days of the ending date of the course.
- E. Depending on the type of assistance approved, HR will work with the Department of Finance to issue either upfront assistance or reimbursement for the approved course(s) upon course completion.



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IV. RESPONSIBILITY

Appointing Authorities and/or Department Heads – Appointing authorities/department heads or designee are responsible for reviewing and approving proposed coursework and upfront assistance or reimbursement requests to ensure the applicant meets program requirements.

Chief Administrative Officer – The Chief Administrative Officer shall have final authority over the terms and conditions of the program, funding availability, and forms of assistance.

Department of Finance – The Department of Finance is responsible for issuing tuition assistance funds upon department and HR approval.

Department of Human Resources (HR) – HR is responsible for oversight and administration of this program, including providing guidance, procedures, and forms for tuition assistance.

Employees – Employees are responsible for submitting tuition assistance requests and documentation in a timely fashion and completing coursework and maintaining city employment in compliance with this policy.

V. DEFINITIONS

Course – A class provided through an accredited U.S. institution of higher education technical or vocational center and that is related to the business of the department and the employee's present position. This excludes workshops, seminars, or city-sponsored training programs.

Reimbursement – Payment by the city made to cover an eligible employee's tuition costs following coursework completion and approval.

Tuition – The cost of a course eligible for reimbursement after deduction of any scholarships or other assistance. Textbooks, learning aids and materials, university fees, laboratory fees, technology fees, transportation, parking, and/or activity fees are not considered tuition costs and are not reimbursable.

Upfront Assistance – Payment made by the city in advance to cover an eligible employee's authorized tuition costs.



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VI. REGULATION UPDATE

Modifications to this policy shall be the responsibility of the Department of Human Resources under the advisement of the Chief Administrative Officer.

Approval


CHIEF ADMINISTRATIVE OFFICER


MAYOR