



City of Phoenix

ADMINISTRATIVE REGULATION	A.R. NUMBER 2.51 Revised
	FUNCTION Human Resources and Payroll Page 1 of 8
SUBJECT EMPLOYEE DEVELOPMENT FUND PROGRAM	EFFECTIVE DATE July 1, 2023
	REVIEWED DATE

Summary of Changes

Administrative Regulation (AR) 2.51 was last revised in 2021. This AR has been revised to include changes resulting from the 2023-24 negotiations/discussions with the employee groups.

I. PURPOSE

This AR establishes procedures for the administration of the Employee Development Fund (EDF) program. The objective of this program is to improve and enhance employees' productivity, performance, and professional growth.

II. EMPLOYEE DEVELOPMENT FUND (EDF) PROGRAM

The Human Resources Department is responsible for the efficient management of the EDF program. This program reimburses all eligible employees, except Middle Managers and Executives (refer to AR 2.281, Management Development Fund). This program's benefits include:

- Tuition Reimbursement
- Professional Membership Reimbursement
- Seminar/Workshop/Conference Reimbursement

The use of Employee Development Funds is subject to review and final approval by the Human Resources Department. Sections III through V of this document provide detailed policy and procedure guidance. To avoid potential conflicts and to guard against the appearance of impropriety, employee-owned businesses or entities are not eligible to receive payment from the City through Employee Development Funds. As a result, direct payments to entities in which a City employee has a substantial interest will not be approved. In addition, reimbursement to an employee for participating in a professional organization or seminar/workshop/conference in which a City employee has a substantial interest will not be approved. A substantial interest will be interpreted in the same manner as the City's Ethics Handbook and Arizona law [Arizona Revised Statutes, Sections 38-502 and 38-503].

III. PROGRAM ELIGIBILITY AND PROCEDURES

A. Tuition Reimbursement Eligibility

All employees in full-time, benefit-eligible positions are eligible for tuition reimbursement. Individuals must be employed by the City at the beginning and conclusion of a tuition-eligible course. Job Share employees may use 50 percent of the annual benefit maximum. Middle Managers' and Executives' tuition is reimbursed through the Management Development Fund as described in AR 2.281.

1. Expenses that are eligible for tuition reimbursement through the EDF must be for a class, course, and/or degree program directly related to an existing City job classification, the City of Phoenix Language Program, and/or the City of Phoenix Registered Apprenticeship Program.
2. The maximum reimbursable amount in a fiscal year is equal to \$6,500.
3. All eligible employees may use up to \$175 (\$350 for Unit 7 employees) of the maximum tuition reimbursement benefit for required books and lab fees.
4.
 - a. Except as set forth in paragraph b, and c, courses must be taken for credit from institutions accredited by any of the national or regional accrediting associations recognized by the Secretary of the U.S. Department of Education and must be related to a City job classification. Accreditation of an institution may be determined by accessing the following website: <http://ope.ed.gov/accreditation/Search.asp>.
 - b. Tuition reimbursement for the City of Phoenix Language Program must be for classes or courses provided by an approved vendor on the Language Program Qualified Vendor List (QVL).
 - c. Tuition reimbursement may also be received for classes or courses required to successfully complete the City of Phoenix Registered Apprenticeship Program.
5. Employees are encouraged to inquire with Human Resources staff in advance to verify if their course/degree program meets eligibility for tuition reimbursement program. The EDF/Tuition Reimbursement Fund Coordinator is located in the HR Connection Center, in the East Lobby of the Calvin C. Goode Municipal Building, 251 W. Washington St. in downtown Phoenix. Email inquiries to hrc@phoenix.gov or call (602) 495-5700.
6. Competency-Based or Self-Paced Learning Degree Programs. To be eligible for tuition reimbursement, full degree credit(s) must be earned. The completion date of the final competency/module required to earn the full course credit(s) will be the factor used to determine which fiscal year's funds are charged. Reimbursement shall not exceed the cost of residential tuition for credit hours earned (not to exceed amount paid by the employee).

7. Unless prior approval is obtained from the Department Director and the Human Resources Director, all college courses must be attended on off-duty time and be able to be applied to an established degree program.
8. Employees must receive a grade of "C" or better for undergraduate courses and a grade of "B" or better for graduate courses.
9. With the exception of student loans (government or private), if the employee receives any type of financial aid grants, stipends, scholarships, Veteran's Education Assistance, or any tuition assistance, the total amount of tuition assistance will be deducted from tuition eligible reimbursements.
10. The last day of the course shall determine the fiscal year to which the payment or reimbursement will be charged.
11. The year-end submission cut-off date for all tuition requests is September 30. Any reimbursement request for a course expenditure that occurs on or before June 30 is due by September 30.
12. Tuition funds are only to be utilized by each eligible employee and may not be donated, given, traded, combined with, or transferred to another employees' fund. All tuition reimbursement requests are subject to review and approval. Unused funds cannot be split between fiscal years or carried into the next fiscal year, unless otherwise provided for in an applicable Memorandum of Understanding, or Memorandum of Agreement; nor can they be donated or given to another employee. Funds by benefit category are not eligible for proration or percentage breakdown of use, should a change in benefit category occur.

B. Tuition Reimbursement Procedure

1. All City employees must submit a *Reimbursement Request Form for Tuition and/or Professional Membership* along with all supporting, back-up documents. This should include a copy of the course description or syllabus. EDF requests should be sent to the HR Connection Center in the Human Resources Department at 251 W. Washington St or via email at hrc@phoenix.gov or via interoffice mail.
2. All reimbursement submissions must include the following supporting documents:
 - Proof of payment and an itemized tuition account history, indicating charges and payment transactions;
 - Course name/title;
 - Copy of an official grade report or a copy of an unofficial transcript; and
 - Class syllabus/description identifying required textbook(s) and an itemized receipt for payment of book(s).
3. Reimbursements are issued through the Finance Department's biweekly payroll process and appear on the employee's paycheck.

C. Professional Membership and Seminar/Workshop/Conference Eligibility

1. Employees in full-time, benefit-eligible positions in the unit categories listed below are eligible for professional membership and seminar/workshop/conference reimbursements. Job Share employees in the unit categories listed below are eligible to use up to 50 percent of their appropriate unit category amount for professional membership and seminar/workshop/conference reimbursements.
2. Unit Categories:
 - Laborers (Unit 1)
 - Office and Clerical (Unit 3)
 - Police Officers (Unit 4)
 - Police Sergeants and Lieutenants (Unit 6)
 - Supervisory/Professional (Unit 7)
 - Confidential Office and Clerical (Unit 8)
3. The last day of the seminar/workshop/conference shall determine the fiscal year the payment or reimbursement will be charged. The year-end submission cut-off date for all previous fiscal year expenditures is September 30. All payment/reimbursement requests for seminars/workshops/conferences that occur on or before June 30 are due by September 30.
4. The date the professional membership, license, or certification payment/reimbursement request is received by the HR Connection Center will determine the fiscal year in which the expenditure will be charged.
5. Professional membership and seminar/workshop/conference funds are only to be utilized by each eligible employee and may not be donated, given, traded, combined with, or transferred to another employees' fund. Unused funds cannot be carried to the next fiscal year nor can they be donated or given to another employee. Funds by benefit category are not eligible for proration or percentage breakdown of use, should a change in benefit category occur.
6. Individuals must be employed by the City at the beginning and conclusion of the seminar/workshop/conference.

D. Professional Membership and Seminar/Workshop/Conference Maximum Reimbursable Amounts

For the specified eligible classifications below, a portion of the tuition maximum reimbursement amount can be used for department approved professional memberships and/or seminars/workshops/conferences. Middle Manager and Executive professional membership and seminar/workshop/conference expenses are reimbursed through the Management Development Fund as described in AR 2.281.

1. Unit 1 employees may be reimbursed up to \$150 of their tuition maximum reimbursement amount to obtain City-related memberships or to attend at least one-day, in-state, City-related seminars.

2. Unit 3 employees in classifications specified in the Unit 3 MOU may be reimbursed up to \$225 of their tuition maximum reimbursement amount to obtain City-related memberships or to attend at least one-day, in-state, City-related seminars.
3. Unit 4 employees may use \$500 of their tuition maximum reimbursement amount to obtain department approved, job-related memberships or to attend job-related seminars/workshops/conferences.
4. Unit 5 employees may use \$1,000 of their tuition maximum reimbursement amount to obtain job-related professional memberships or to attend department-approved, job-related seminars/workshops/conferences.
5. Unit 6 employees may use \$800 of their tuition maximum reimbursement amount to obtain job-related professional memberships or attend department-approved, job-related seminars/workshops/conferences.
6. Unit 7 employees may use \$1,000 of their tuition maximum reimbursement amount to obtain job-related professional memberships or to attend department-approved, job-related seminars/workshops/conferences.
7. Unit 8 Confidential Office and Clerical employees may use \$450 of their maximum reimbursement amount to obtain job-related professional memberships or to attend department-approved, job-related seminars/workshops/conferences.
8. Building Inspectors, Construction Permit Specialists, and Airport Operations Assistants (Airsides) will be reimbursed one time only for the cost of their required certification after passing the test for the certification. All future mandated certifications should be funded by the respective department.

E. Professional Membership Reimbursement Procedure

1. Department-approved professional memberships, certifications, licenses, and technical registrations that are job-related and provide a clear and understandable benefit to the City may be eligible for payment/reimbursement. Submit reimbursement requests with a completed and signed *Reimbursement Request Form* to the HR Connection Center at 251 W. Washington St. or via email at hrc@phoenix.gov or interoffice mail. Requests for reimbursement must be accompanied by a payment receipt or other satisfactory proof of payment. When the cost of a professional membership, certification, license, or technical registration exceeds \$50, direct payment may be made to a vendor with appropriate documentation.

F. Seminar/Workshop/Conference Reimbursement Procedure

1. All department-approved EDF seminar/workshop/conference reimbursement requests must be submitted to the HR Connection Center with a completed and signed *In-County Registration Form*. Requests for reimbursement must be accompanied by a payment receipt or other satisfactory proof of payment and include information detailing the

seminar/workshop/conference. Reimbursements are issued through the Finance Department's biweekly payroll process and appear on the employee's paycheck. When the cost of a seminar/workshop/conference exceeds \$50, direct payment may be made to a vendor with appropriate documentation.

2. Seminars/workshops/conferences, whether within or outside Maricopa County, must have an educational component, be job-related, and demonstrate a clear and understandable benefit to the City. Within or outside Maricopa County, payment or reimbursement may be denied if another seminar/workshop/conference with similar course content is available at a lower cost. For seminars/workshops/conferences with added costs (e.g., lunch with a presenter, or special seating), payment or reimbursement will be made at the lowest available cost.
3. All travel-related expenses submitted for reimbursement must comply with AR 3.41 (Business, Conference and Training Travel and Related Expenses).
4. The last day of a seminar/workshop/conference will determine the fiscal year in which the expenditure will be charged.
5. Special community-related presentations, breakfasts, luncheons, and dinners that are sponsored by the City may be eligible for payment/reimbursement on a case-by-case basis. To ensure eligibility for payment/reimbursement, contact the HR Connection Center at (602) 495-5700.

IV. PROGRAM ELIGIBLE EXPENSES

- A. Tuition for a course identified in Section III, paragraph 4
- B. Required course books, labs, and approved tuition installment or deferred payment.
- C. Professional memberships, certifications, and technical licenses'.
- D. Registration for a seminar/workshop/conference.
- E. Air travel costs, subject to AR 3.41, associated with the seminar/ workshop/conference, including documented ground transportation in the destination city for shuttle, taxi, subway or train.
- F. Out-of-county mileage reimbursement, in accordance with AR 3.41, up to the cost of a 14-day advance-purchase economy or discounted airline ticket.
- G. Lodging reimbursement, in accordance with AR 3.41.

V. PROGRAM INELIGIBLE EXPENSES

This list is not all-inclusive, but a guide of ineligible expenses:

- A. The cost of educational supplies, registration fees, tests, residency fees, late registration, parking, taxes, shipping and handling, audits, student activities, recreation fees, financial aid,

meals, non-resident, or other special fees associated with a course and/or degree program.

- B. Non-degree courses related to health, fitness, hobbies, games, sports, etc.
- C. Health club memberships and physical fitness activities or events, including YMCA/YWCA memberships.
- D. Computers, hardware, software, software subscriptions, or related peripheral equipment; personal electronic devices.
- E. Programs covered under the City's existing insurance or Employee Assistance plans. This includes counseling (family, marital, psychological, psychiatric, etc.).
- F. Personal financial education or estate planning services, including seminars, books, and publications.
- G. Charitable donations or fundraising events, entertainment activities, and tangible goods.
- H. Application fees, processing fees, administrative and other special fees.
- I. Memberships or activities relating to religious, sectarian, networking, or social organizations, and alumni and honor society memberships, community and volunteer organizations unless City approved.
- J. Optional certifications, licenses, and technical registrations that are **not related** to the employee's current job and do **not** provide a clear benefit to the City.
- K. Additional fees to re-take an exam (or re-certify), if not passed the first time, for City-related certifications or licenses.
- L. Optional or special events (tours, lunch with the presenter, sports events, etc.), voluntary contributions, or donations.
- M. Materials, books, videos, CDs/DVDs, and subscriptions unless special department arrangements have been pre-approved by the Human Resources Department.
- N. Car rentals and incidental expenses such as meals, beverages, phone charges, baggage, parking, gratuity, or other miscellaneous charges.

VI. EDUCATION LEAVE

Supervisory/Professional employees are entitled to 2 days or 16 hours of annual education leave. This time will be added to the employee's July vacation accrual. Police Supervisory employees are entitled to 1.25 days or 10 hours of annual education leave. For hourly employees, this time will be added to the employee's compensatory time bank at the beginning of the first pay period in July. Exempt Police Supervisory employees will have this time added to their July vacation accrual. For record keeping purposes, this time will be subject to the restrictions and the authorization requirements of the vacation rules.

VII. POLICY COMPLIANCE

Supervisors or employees found to be in violation of this AR will be subject to disciplinary action.

VIII. QUESTIONS

Questions related to this Administrative Regulation (AR) should be directed to the Human Resources Department, HR Connection Center, at (602) 495-5700, or via email at hrcenter@phoenix.gov.

JEFFREY BARTON, City Manager

By:


Ginger Spender
Deputy City Manager