



Educational Assistance Form #1

Requests for Education Assistance start with the employee completing and providing the following items to Human Resources (signed original forms are required):

- 1) Educational Assistance Course Approval form #3
 - 2) Notarized Agreement for Reimbursement form #2
 - 3) Course syllabus or course description (including credit hours)
 - 4) Job Description
- Class must be taken for credit at an accredited college or university.
 - Full-Time employees are eligible once they have completed any required probation period.
 - Your supervisor and department director shall review, approve and sign all educational assistance forms.
 - Requests for approval must be received in HR *no later than two weeks* from the course start date.

Human Resources will review the Education Assistance Tuition Reimbursement package. HR Management, County Administration & Clerk of Courts Payroll Manager will sign and approve all education assistance forms. If the request **does not** meet the criteria, you and your department director will be notified via e-mail.

The reimbursement process for an approved class is as follows:

- 1) Educational Assistance Reimbursement Form #4
- 2) Attach receipts for tuition, books, lab fees, and registration fees.
(Receipts must include the cost of the item, and show proof of the payment amount.)

NOTE: Reimbursement will be based upon the rate that the Florida public universities and/or colleges would charge a student with Florida resident status for a similar course.



Educational Assistance Course Approval Form #2

Please complete a new form for each course taken:

Name: _____ Position Title: _____
 SS #: xxx-xx-_____ Position #: _____
 Regular status Yes No Date of Hire: _____
 Department/Division: _____ Work Phone: _____
 Course Title: _____ Course Number: _____
 Credit Hours: _____ Cost per Credit: _____
 Tuition Cost: _____ Book/Lab Expenses: _____
 Total Reimbursement Requested: _____ Institution: _____

Course Begin Date/End: _____ Undergraduate Program Master's Program
 Degree Title _____

This course relates to the following official job duties of the employee, and this course is expected to enhance the **Knowledge, skills, and abilities** of this employee's ability by:

I have read and understand the provisions of the County on Educational Assistance (Policy 211) and agree to the terms and conditions of this document. I understand that I will be reimbursed only for courses directly related to my current job, and at the rate of the public colleges.

Employee Signature Date

Approval Number

Department Director Date

Human Resources Designee Date

County Administration Designee Date



Print Name & Date: _____

Job Title: _____

Department: _____

Course Name: _____

Form #3

AGREEMENT FOR REIMBURSEMENT OF EDUCATIONAL ASSISTANCE

1. The undersigned acknowledges that Lee County has agreed to reimburse the employee for educational expenses in accordance with the provisions of Chapter 125 and Section 112.063, Florida Statutes.
2. In accordance with Lee County Policy 211, the undersigned agrees to reimburse to the county in full said educational expenses paid to the employee if the employee leaves the employ of the Lee County Board of County Commissioners voluntarily or is discharged from employment or voluntarily changes classification status to anything other than full-time employment in a Board-approved position within one (1) year from the date of reimbursement.
3. Unless other arrangements are made prior to separation of employment, repayment will be withheld from the employee's final payment for any accrued sick leave available for the buy-back program and available accrued vacation.
4. If the required reimbursement exceeds the final pay of the employee, that employee shall agree to repay the county in full within thirty (30) days of separation of employment with Lee County. Employee's voluntarily changing classification to anything other than full-time employment in a Board-approved position shall notify the Department of Human Resources and make necessary arrangements to repay the county for educational expenses within one week of the change in employment status.
5. Employees that are laid off or whose position is privatized or whose position status is changed from full-time, Board-approved employment operationally by the county will not be required to reimburse the county for these expenses.
6. Reimbursement will be at Florida public college rate.

By signing below, I certify that I have read and understood the policy pertaining to Education reimbursement.

Employee Signature & Date

STATE OF FLORIDA)
) §:
COUNTY OF LEE)

The foregoing instrument was acknowledged before me on the _____ day of _____, 20____
by _____ who [] is personally known to me or [] has produced
_____ as identification and did (did not) take an oath.

Notary seal:

Notary Public

(Print Name)

My commission expires



Educational Assistance Form #4

Name: _____ Position : _____
 SSN: **xxx-xx-** _____ Position #: _____
 Dept/Div: _____ Work Phone _____

Please complete a new form for each course taken:

Course Title: _____ Credit Hours: _____

- | | | |
|---|------------------------------|-----------------------------|
| 1. Is your grade report or transcript attached? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 2. Is your tuition and lab fees bill or receipt attached? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 3. Is your receipt for books attached? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 4. Did you receive or are you eligible to receive reimbursement from any other sources (e.g. Veteran's Administration, grants, scholarships)? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

If yes to #4, what is the total amount of that reimbursement? _____

Credit Hours		<u>Amount Allowed for Grade</u> "A" = 100% "B" = 100% "C" = 100% "PASS" = 100% Below "C" or "FAIL" = 0%
Tuition (Cost per credit hour)		
Total Tuition Allowed		
Total Fees Allowed		
Cost of Required Books		
Total Allowable Expenses		
Grade Achieved		
Less Other Reimbursements		
TOTAL REIMBURSEMENT		

I have read and understand the provisions of the county policy on Educational Assistance (Policy 212), and agree to the terms and conditions of this document. I have received approval for this course and have signed and agreed to provisions of the "Agreement for Reimbursement of Tuition Assistance".

Employee Signature & Date

Original Approval Number

Human Resources Designee & Date

Clerk of Courts Designee & Date

County Administration Designee & Date



Educational Assistance Policy 211

It is the policy of Lee County Government to provide educational assistance to its employees to allow them to enhance their ability to serve the public interest of the citizens of Lee County.

General Provisions:

Coursework must be designed to *enhance* the knowledge, skills, and abilities relating to the official duties that the employees perform, and must be taken for credit at an accredited college or university.

- No reimbursement will be made for coursework or training required as a minimum qualification for employment.
- All regular full-time employees are eligible for educational assistance once they have completed any required probationary period.
- Employees should seek approval prior to enrollment. The Department and Human Resources ***MUST*** receive requests for educational assistance *no later than two weeks after the first day the course begins.* The Department and Human Resources will consider the following factors in evaluating requests for educational assistance:
 - The nature, content, and purpose of the course of study;
 - The benefits to be derived by the enhanced ability of the employee to serve the public trust;
 - Availability of funds for such reimbursement in the current fiscal year;
 - The number of courses the employee has submitted for reimbursement in the calendar year shall not be limited;
 - The employee’s level of responsibility;
 - The estimate of the costs involved, and;
 - Any potential lost time or productivity while the employee attends the program.

Reimbursement Requests:

- The County will authorize the appropriate reimbursement of tuition, required books, required software, lab fees, and registration fees based upon the rate that Florida public universities and/or colleges would charge a student with a state resident status for a similar course.
- Reimbursement will be based on the following schedule:

GRADE	REIMBURSEMENT
"A"	100%
"B"	100%
"C"	100%
"Pass"	100%
Below "C" or "Fail"	0%

- Employees receiving educational reimbursement from other sources must inform the County and reimbursement will be adjusted accordingly.
- Classes and assignments are to be completed outside of regular working hours, and should not interfere with the employee’s work. Unsatisfactory job performance during enrollment may result in forfeiture of educational assistance.

- Employees shall not use any space, personnel, equipment, or supplies of the County in the process of fulfilling any of the requirements of the coursework for which they are being reimbursed.

Employees shall not be given any bonus or additional incentive pay for completion of a degree for which any costs were reimbursed under this Policy.

Approval/Reimbursement Process

- An employee applying for educational assistance shall complete and provide the following to his/her Supervisor and Department Director: the approval application, the notarized Agreement for Reimbursement of Educational Assistance, and a copy of the course syllabus/course description. By signing the Agreement for Reimbursement the employee agrees to repay any educational reimbursements received in the twelve (12) months preceding his/her ceasing to be a full-time employee of the Lee County Board of County Commissioners.
- The Department shall evaluate the request and forward it along with any supporting documentation needed and a recommendation for approval/disapproval to the Department of Human Resources.
- Human Resources, County Administration and the Payroll Manager will determine whether the request is eligible for educational assistance and advise the Department Director and the employee of its conclusion.
- Upon completion of coursework previously approved for educational assistance, the employee must submit a copy of the school grade report and original receipts to the Department of Human Resources.
- Human Resources & County Administration will verify expenses and submit the request for the appropriate amount of reimbursement from the Clerk of Court. Upon approval of the Clerk of Court, the reimbursement will be issued by direct deposit to the employee's account.