

CITY OF STAMFORD
MAA TRAINING AND TUITION FUND REIMBURSEMENT REQUEST

TRAINING AND TUITION FUND REIMBURSEMENT POLICY AND INSTRUCTIONS

The City of Stamford, through participating unions, offers employees the opportunity to improve their skills and advance their education by providing financial assistance to those who meet the following eligibility requirements:

- A. All applications must be made prior to the cutoff date for submission, unless there is a valid reason for failure to meet this deadline. Cutoff dates are listed on the Human Resources Website. Applications not made in advance will be rejected.
- B. Course work for which assistance is being requested must be job related, or it must be of such a nature as to improve the employee's promotional opportunities, or it must be a requirement of a college or university degree program, which is related to the employee's development as a City employee.
- C. Course work must be taken at an appropriately recognized and certified institution. No reimbursement is available under this policy for association meetings, conventions, institutional programs, or other similar forms of extracurricular programs. No reimbursement for late fees will be made unless there is sufficient justification for payment.
- D. Pell Grants or scholarships will be deducted from any available reimbursement.

In order to be reimbursed, the employee must:

- A. Complete and submit the "Training and Tuition Fund Reimbursement Form" to the Department of Human Resources prior to class registration and the submission cutoff date. HR will schedule a meeting with the appropriate committee to review and act on your application. After the committee has met, you will receive a memo indicating whether your request was approved or denied, the reimbursement amount approved or a request for any missing information.
- B. After you have completed the course or certification program, you must complete a Reimbursement Form, provide a copy of the committee's approval memo, proof of satisfactory completion of course, and proof of prior payment (i.e. copies of receipts, cancelled check, statement from school) to the Controller's Office (**Not HR**).
- C. Your reimbursement request must include satisfactory evidence of completion of the course with a grade of "C" or higher, or a copy of certificate if applicable. Provide this documentation (i.e. copies of final grade or marking equivalent) to the Controller's Office (**Not HR**).

All submissions are limited to \$2500 approval per submission. If, at the end of the fiscal year, there is additional monies remaining in the training and tuition fund, additional appropriations may be made. Reimbursement is made in accordance with the specific union contracts with a limited amount of money set aside per fiscal year. Refer to your union contract for more details. Please be advised that your reimbursement may be subject to imputed income pursuant to the IRS regulations.

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Name: _____ Department: _____ Ext.: _____

Position: _____ Date Submitted to Human Resources: _____

Institution / School: _____

Date of Course (Circle One) **Fall** **Winter** **Spring** **Summer** Year _____

Title and Number of Course (Use a separate application for each course): _____

Is this course a substitution for a previously approved course? **yes** **no**

Provide brief description of course: _____

Degree anticipated and date? _____

Are you a dues paying member of the MAA Supervisory Union? **yes** **no**

Are you taking a course that will: Enhance your current job performance? **or** Assist you in obtaining a promotional opportunity?
Please Check One

| | | |
|---------------------------|----------|---|
| Tuition: | \$ _____ | Will you receive government or other financial aid, excluding the City of Stamford? <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Text Books: | \$ _____ | |
| Miscellaneous Fees, etc.: | \$ _____ | |
| Total Costs: | \$ _____ | |

In order to be reimbursed, the employee must (1) provide proof of prior payment for the course, and (2) provide satisfactory evidence of completion of the course with a grade of "C" or higher, or copy of certificate if applicable.

I hereby certify that the above information is accurate and true to the best of my knowledge and that I have not previously submitted a request for reimbursement for the same course(s). Submitting duplicate requests or a request for reimbursement that includes a request for payment of monies received from grants or any type of financial aid or scholarship may constitute fraudulent behavior; which could lead to disciplinary action up to and including termination.

Employee Signature

Date

Applications must be completed and signed prior to registration and submitted to Human Resources for approval. **In the event that the class/course approved by the Reimbursement Committee is not available at the time of registration and the employee wishes to substitute another class, it is the employee's responsibility to notify human resources so that the Reimbursement Committee can review the proposed substituted class/course.** The availability and disbursement of funds is based upon the specific union contract and the number of individuals that have applied. Late fees are not reimbursable unless there is justified for them.

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Committee Approval (Print Name) Management _____
Date

Committee Approval (Sign Name) Management _____
Date

Committee Approval (Print Name) Union _____
Date

Committee Approval (Sign Name) Union _____
Date

Committee Rejection (Print Name) Management _____
Date

Committee Rejection (Sign Name) Management _____
Date

Committee Rejection (Sign Name) Union _____
Date

Committee Rejection (Sign Name) Union _____
Date

FOR CONTROLLER'S OFFICE/PAYMENT USE ONLY

Proof of Payment _____ Grade: _____

Controller's Office Signature _____
Date