

**CITYWIDE EDUCATION ASSISTANCE PROGRAM
FOR PARTICIPATING LABOR ASSOCIATIONS: ACE, AEE, IAM, IBEW, SEIU**

Summary

As outlined in the Memorandum of Understanding for ACE, AEE, IAM, IBEW and SEIU and the City's Personnel Ordinance (Section IX, Chapter 2: Training), eligible employees may receive tuition reimbursement when eligibility criteria is met. This program is effective August 1, 2024, for ACE, AEE, IAM, IBEW and SEIU members. Program ends on September 30, 2026, or until the funds for each union have been exhausted. No reimbursement for tuition will be considered prior to the effective date. Education Assistance Program is subject to funding by the applicable appointing authority, until the funds budgeted for Education Assistance is no longer available. Employees must be timely in correctly completing the correct forms and supporting documentation in order to be reimbursed, and as long as funds are available. Below is the criteria for the program as well as the steps to access the program and a Frequently Asked Questions (FAQ) document.

Employee Eligibility Criteria:

1. Employees must be current, permanent full – time or permanent part-time City of Long Beach employees.
2. The Courses must be from an accredited college, university, vocational, trade school or certificate program. Certificate program will only be reimbursed if not already paid by the City of Long Beach.
3. The Course(s) pursued must be “job or career related”.
 - a. A job or career related course is specifically designed to prepare individuals for employment in a particular field or industry. The course does not need to be directly related to the employee's current job position.
 - b. A certificate program would not be eligible for Education Assistance Program reimbursement when the certificate is already paid by the City.
4. Only tuition (semester or quarter units) will be reimbursed.
5. Employee must complete the course(s) with a grade of:
 - a. “C or higher” for undergraduate studies or
 - b. “B or better” for graduate studies
 - c. Pass (if course is ungraded or Pass/No Pass)
 - d. An incomplete grade or withdraw is not eligible for reimbursement

Steps for Approval of Courses and Reimbursement:

Employee must correctly complete the two forms within the timelines listed below and be approved by the department:

STEP 1: Employee must submit the Application of Education Assistance Program form (paper form) and a copy of the course description and tuition fees (units) to their direct supervisor's review and approval. Form can be found on the HR website or Appendix A below.



Frequently Asked Questions

Below is a list of frequently asked questions and answers (FAQs) regarding the Citywide Education Assistance Program.

1. Who is eligible for the Citywide Education Assistance Program?
 - Current permanent Full time and permanent Part time City of Long Beach Employees who are represented by Association of Confidential Employees (ACE), Association of Engineering Employees (AEE), International Association of Aerospace and Machinists Workers (IAM), International Brotherhood for Electrical Workers (IBEW) and Service Employees International Union (SEIU).
 - The Port and Utilities are continuing with their own separate programs, so employees from those departments will use their specific departments programs only and cannot participate in the Citywide Program.
2. When does this program begin and end?
 - The program is effective on August 1, 2024 and ends on September 30, 2026 or until the funds are exhausted.
3. But I took a class in June 2024, can I be reimbursed for this class?
 - No, there is no reimbursement of classes prior to the effective date of the program, which is August 1, 2024.
4. Once funds are exhausted, will there be money for this program during the dates above?
 - There will be no additional funds added to this program once the current funds are exhausted for the contract term.
5. What is the process for reimbursement of my course(s)?
 - Step 1: Employee must submit an Application of the Application of Education Assistance Program form (hard copy form), course description and tuition fees (units) for their initial review and approval. This needs to be completed within 30 calendar days of the start of the semester or quarter. (Appendix A)
 - Step 2: After the employee completes the course(s), they must submit the Education Assistance Program Reimbursement form (electronic form) and upload onto this form an unofficial transcript or a similar documentation (screen shot) which lists the courses and grades earned and amount paid for tuition directly to their department's Administrative Officer (AO). Link to second form: <https://forms.office.com/g/WYbc5m44bD> and user guide in Appendix B below.
6. What are some examples of courses that will be acceptable for reimbursement?
 - General education courses required for college graduation of a bachelor's degree in a career related field like Business, Public Administration, Public Policy, Engineering, Computer Science, Communications, Social Work, etc.
 - i. For example, an English class needed for Social Work degree.
 - ii. For example: a history class needed for a Business degree

- This needs to be completed within 30 calendar days of the start of the semester or quarter (see Appendix A below) .
- Supervisor will determine whether or not the courses meet the eligibility criteria and will inform the employee directly.
- If the employee does not agree with the supervisor’s decision, they can contact their department’s contact person listed in Appendix D below.

STEP 2: After the employee completes the course(s), they must submit the Education Assistance Program Reimbursement form (electronic form) and upload an unofficial transcript or a similar documentation which lists the courses and grades earned and a receipt, invoice, etc. of the amount paid for tuition (screenshot is acceptable).

- Link to second form: <https://forms.office.com/g/WYbc5m44bD>. This form needs to be submitted electronically to their department’s contact person listed in Appendix D.
- User guide on completing and submitting 2nd form is listed in Appendix B below.
- Form must be completed and submitted to the department 30 calendar days after the end of the semester or quarter.

Reimbursement amounts per fiscal year are as follows:

Semester/Quarter Payment Schedule

1.0 through 5.9 semester units	\$375.00
1.0 through 7.9 semester units	\$375.00
6.0 or more semester units	\$400.00
8.0 or more quarter units	\$400.00
Community College	\$120.00

Total Maximum per fiscal year **\$800.00 (maximum amount employee can receive per fiscal year)**

- Individual classes that are job/career related but are not part of degree or certificate program. Example: Intro to Microsoft Excel at a Community College

7. What are the eligibility criteria for reimbursement?

- The employee must be a current, permanent full – time or permanent part-time City of Long Beach employees.
- The Courses must be from an accredited college, university, vocational, trade school or certificate program.
- A job or career related course is specifically designed to prepare individuals for employment in a particular field or industry. The course does not need to be directly related to the employee’s current job position.
- The purpose to take the course(s) is to increase competence in present job or prepare for a future career (i.e. general education classes for a AA or BS degree).
- A certificate program would not be eligible for Education Assistance Program reimbursement when the certificate is already paid by the City.
- Only tuition (semester or quarter units) will be reimbursed.
- Employee must complete the course(s) with a grade of:
 - i. “C or higher” for undergraduate studies or
 - ii. “B or better” for graduate studies
 - iii. Pass (if course is ungraded)
 - iv. An incomplete grade or withdraw is not eligible for reimbursement
- Employee must correctly complete the two forms within the timelines listed below and be approved by the department (i.e. direct supervisor (1st form) and AO (2nd form)

8. What is acceptable documentation in order to be reimbursed?

Examples include unofficial transcripts and screen shots of student portal with grades.

9. Is unofficial documentation acceptable?

Yes, unofficial documentation of a transcript or a screen shot of a student portal which lists grades are acceptable. (Appendix C for example)

10. Where can I find the forms for reimbursement? The City will send an email to employees from their respective unions with the forms /link. But it will also be on under the “helpful links for employees in left hand margin of the HR website (see red outlined in screenshot below). Website is: [HR \(longbeach.gov\)](http://HR.longbeach.gov)

Welcome To The Long Beach City Human Resources Department

The seventh-largest city in the state of California, Long Beach employs over **6,000 full and part-time personnel** in 23 departments throughout the City. We believe that the City's greatest assets are its employees, and we take great pride in managing the systems that support a highly productive, innovative, caring, and customer-oriented workforce.

Helpful Links For Employees

CalPERS

EEO

Employee Assistance Program (EAP)

Contact Lists

11. If my supervisor doesn't approve my 1st form, who do I go to?
 - Contact your department's Administrative Officer/contact person directly (Attachment D for contact information) . They will review the request and will have the final determination on whether or not your request is approved.
12. Do I receive this reimbursement in my paycheck?
 - No, this reimbursement is not included in your paycheck. It will be given as another check to the employee.
13. Is this reimbursement taxed?
 - No, this reimbursement is not taxed.
14. I am a Port of Long Beach employee or a Long Beach Utility employee and they have their own Education Assistance Programs. Can I receive reimbursements from both programs?
 - The Port and Utilities are continuing with their own separate programs, so employees from those departments will use their specific departments programs only and cannot participate in the Citywide Program.
15. What are the amounts that will be reimbursed?

The amounts listed below are also listed in the respective MOUs.

Semester/Quarter Payment Schedule

1.0 through 5.9 semester units	\$375.00
1.0 through 7.9 quarter units	\$375.00
6.0 or more semester units	\$400.00
8.0 or more quarter units	\$400.00
Community College	\$120.00
Total maximum per fiscal year	\$800.00
16. Can an employee apply multiple times? Yes, they can apply for each semester or quarter as long as there is funding available.

**CITY OF LONG BEACH
APPLICATION FOR EDUCATION ASSISTANCE**

APPLICANT INFORMATION

FULL NAME _____
 PHONE _____
 EMAIL _____
 DEPT/DIVISION _____
 POSITION TITLE _____
 POSITION TYPE Perm Full Time Perm Part Time
 LABOR ASSOC ACE AEE IAM IBEW SEIU

NOTE TO APPLICANT: Approval of this application does not guarantee the tuition reimbursement. Reimbursement is subject to meeting the criteria for reimbursement AND completion of all forms and documentation. Submit completed form to your direct supervisor for their review.

 APPLICANT SIGNATURE DATE

***Applicant must submit course descriptions and tuition costs with this application to the supervisor**

Employee Eligibility Criteria:

- Complete and submit required forms to the department for approval:
 - Application for Education Assistance Program, submitted within 30 days of the start of course.
 - Education Assistance Program Reimbursement Form, submitted within 30 days after completing the course.
- Both forms and required documents must be approved in order to be reimbursed.
- Complete courses with grade "C" or better in undergraduate studies or grade "B" or better in graduate studies or "Pass". A withdraw or incomplete course will not be reimbursed.
- Courses from accredited colleges/universities/vocational/trade school/certificate programs will be reimbursed. Courses from certificate programs not already paid by the City of Long Beach will also be reimbursed.

COURSE INFORMATION

COLLEGE/UNIVERSITY/VOCATIONAL/TRADE SCHOOL
 NAME _____
 TERM BEGINS _____
 TERM ENDS _____
 SEMESTER QUARTER OTHER _____
 UNDERGRADUATE GRADUATE OTHER _____

COURSE NO	COURSE TITLE*	UNITS *	FEES

UNIT FEE TOTAL \$ _____

Reason for request: _____

SUPERVISOR APPROVAL

I reviewed the Application for Education Assistance, course descriptions and tuition costs and determined that the course(s) mentioned in this application is career related.

APPROVED NOT APPROVED

Justification for decision above: _____

Supervisor's signature: _____

Date: _____

***Supervisor must provide the employee and department's Administrative Officer with a signed copy of this form.**

User Guide

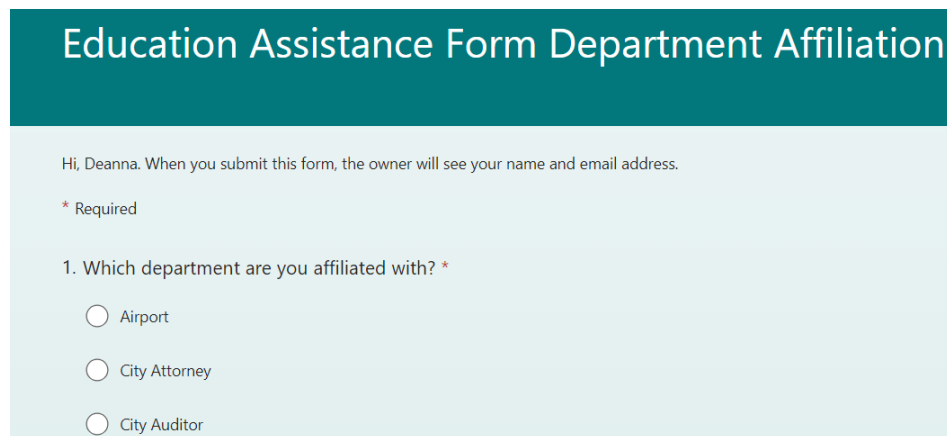
2nd Form: Electronic Form- Education Assistance Program Reimbursement User Guide

The goal of this guide is to show users how to complete the electronic version of Education Assistance Request Form based on their individual department.

HOW TO FILL OUT THE DEPARTMENT AFFILIATION PAGE

Step 1: Click on the [link](#) to access the department affiliation section.

Note: If unsure, contact your designated department contact to provide this information.



The screenshot shows a form titled "Education Assistance Form Department Affiliation". Below the title, there is a message: "Hi, Deanna. When you submit this form, the owner will see your name and email address." Below this message, there is a note: "* Required". The main question is "1. Which department are you affiliated with? *". There are three radio button options: "Airport", "City Attorney", and "City Auditor".

Step 2: The link will re-route you to the Education Assistance Form Department Affiliation page. Find your department and then click **Next**. Make sure to double check that you selected your department correctly or you will be filling out a different department's page.

Note: If your department is not in the list or if you're unsure, please contact your designated department contact to provide this information.

Education Assistance Form Department Affiliation

Hi, Deanna. When you submit this form, the owner will see your name and email address.

* Required

1. Which department are you affiliated with? *

Airport

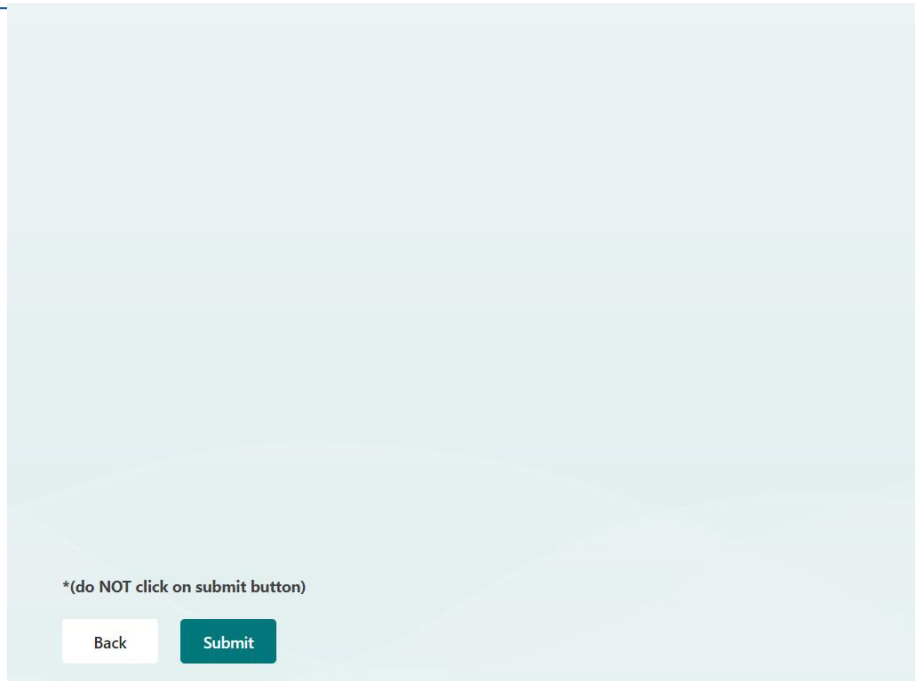
Step 3: When you click **Next**, it will take you to a separate page that contains a separate link to fill out your individual department form. Click on that link and complete the next steps.

Education Assistance Form Department Affiliation

Please click the link to proceed for
Airport: <https://forms.office.com/g/1uFWwRhXg9>

Step 4: If the wrong department was selected, scroll down and click on the **Back** button to be redirected to the Department Affiliation form and repeat steps 1-3 for the correct department.

*Note: In the bottom of the page, there will be a submit button. This is a reminder **to do not click on that submit button.** It will not help with submission for your application.*



HOW TO FILL OUT YOUR DEPARTMENTAL FORM.

Step 1: After clicking on the link in the previous section, you will be directed to your department’s Education Assistance Program Reimbursement form. Verify it is the correct department by looking at the “-Department Name”. If not, refer back to the previous section in Step 4.

Education Assistance Program Reimbursement Form - Airport

Please complete the form below and upload the required documentation. This form must be submitted 30 calendar days after the semester/quarter has been completed.

Note: Please make sure you have the correct forms uploaded and this form is completed correctly. Otherwise, it will delay your reimbursement processing.

Hi, Deanna. When you submit this form, the owner will see your name and email address.

* Required

1. First Name (As recorded on submitted institutional records) *

Enter your answer

2. Last Name (As recorded on submitted institutional records) *

Enter your answer

Step 2: Fill out questions 1 and 2 based on your submitted institutional records. For example, this can come from your transcripts from your institution.

1. First Name (As recorded on submitted institutional records) *

Deanna

2. Last Name (As recorded on submitted institutional records) *

Nguyen

Step 3: Fill out questions 1 and 2 based on your submitted institutional records. For example, this can come from your transcripts from your institution.

1. First Name (As recorded on submitted institutional records) *

Deanna

2. Last Name (As recorded on submitted institutional records) *

Nguyen

Step 4: Fill out questions 3, 4, and 5 based on your work provided information such as phone number, email address and union.

Note: If unsure or if details cannot be provided, please contact your designated department contact for next steps.

3. Phone Number *

562-570-0000

4. Work Email Address *

deanna.nguyen@longbeach.gov

5. Labor Association *

IAM

Step 5: Fill out questions 6 based on the unofficial transcripts or information containing Course Name and Grades. For question 7, upload the receipts to provide proof of tuition paid by employees. Double check to make sure that everything is correct from questions 1 – 7. If either information is missing, you cannot proceed with submission.

Note: If you get a message saying “failed to upload”, please submit smaller file size versions of the pdf. The form allows for 10 file uploads maximum.

6. Proof of Course Grades: Upload the college/universities unofficial transcripts or related documentation which has the course name and grades (i.e. for reimbursement must achieve a grade of "C" or higher for undergraduate courses or a grade of "B" or higher for graduate courses) (Non-anonymous question) *

Course No - spongebob.pdf

File number limit: 10 Single file size limit: 1GB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

7. Proof of Course Receipts: Upload the college/university receipts or related documentation indicating tuition paid by employee. (Non-anonymous question) *

test.pdf

File number limit: 10 Single file size limit: 1GB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

Step 6: Click Next. You will receive the message below. Click on the **Back** button if you would like to check 1 more time to verify your submission and accuracy. If everything is correct, click **Submit**.

Note: Once you click submit, if the form turns out not to be correct, you will have to contact your designated department contact and fill out another form again as the form does not allow to edit once form is submitted.

Education Assistance Program Reimbursement Form - Airport Test

Thank you for completing the Education Assistance Program Reimbursement Form. Your department's Administrative Officer (AO) will review to see if you met the program's criteria and uploaded the required documentation. You will receive another email from the department's AO whether or not your form has been approved and sent for reimbursement. If you have any questions, please contact your department's AO directly.

Microsoft 365

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User Guide

DEPARTMENT COMMUNICATION

Step 1: You will receive a confirmation email as shown below. Note that processing approvals will vary depending on department. Should any more information be needed, your department’s administrative team will contact you.

Confirmation of Response Submission

 Deanna Nguyen
To:  Deanna Nguyen



Fri 7/26/2024 9:00 AM

Hello Deanna Nguyen:

This is a confirmation email that your Education Assistance Reimbursement form has been submitted and is under review by the Administrative Team. The Administrative Team will contact you should there be any additional information needed.

Thank you,

City of Long Beach

Step 2: If approved, you will receive an email as shown below. In terms of the payment processing, please also note it varies and that you will receive communication from your department contact moving forward.

Hello Deanna Nguyen:

Your submission for the Education Assistance Program Reimbursement Form has been approved by the department and the check is being processed by the City of Long Beach.

While it varies, the processing of the check may take 2-3 pay periods.

If you have any questions, please email your department contact person(s) as shown below.

There will be a table provided with a list of department contacts

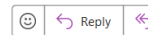
Thank you,

City of Long Beach

Step 3: If rejected, you will receive the email as shown below. The email will provide the reason. If you need to resubmit a form or want to appeal to the decision, please contact your designated department contact.

Education Assistance Form Status

 Deanna Nguyen
To:  Deanna Nguyen



Hello Deanna Nguyen :

Your submission for the Education Assistance Program Reimbursement Form has been rejected for the following reason:

Deanna's documentation is insufficient.

If you have any questions, please reach out directly to your department's Administrative Officer.

Thank you.

City of Long Beach

Sample of Unofficial Transcript (online)

USCOA SIS Enrollment history

On-line Academic Student Information System



Unofficial Transcript

ID#:



Last Name First Name

Unofficial Transcript

Current Degree Objective

	Degree Name	Degree Title
MAJOR	Master of Science	Human Resource Management

Cumulative GPA through 20222

	Uatt	Uern	Uavl	Gpts	GPAU	GPA
UGrad	0.0	0.0	0.0	0.00	0.0	0.00
Grad	24.0	24.0	24.0	92.20	24.0	3.84
Law	0.0	0.0	0.0	0.00	0.0	0.00
Other	0.0	0.0	0.0	0.00	0.0	0.00

Definition of Grades

Fall Term 2020

Course	Units Earned	Grade	Course Description
HRM-505	2.0	A	Organizational Culture and Employee Outcomes
HRM-500	2.0	A	Human Resource Strategy

Spring Term 2021

Course	Units Earned	Grade	Course Description
HRM-520	2.0	B	Talent Management
HRM-510	2.0	A	Leadership in Human Resources

Summer Term 2021

Course	Units Earned	Grade	Course Description
HRM-530	2.0	A-	Learning and Development
HRM-525	2.0	A	Total Rewards

Fall Term 2021

Course	Units Earned	Grade	Course Description
HRM-540	2.0	A	Human Resources Analytics
HRM-535	2.0	A	Employee Relations

Spring Term 2022

Course	Units Earned	Grade	Course Description
HRM-545	2.0	A	Management of Diverse and Global Human Resources
HRM-515	2.0	A	Organization Design

Summer Term 2022

Course	Units Earned	Grade	Course Description
HRM-555	2.0	A-	Anticipating the Future of Human Resources
HRM-550	2.0	A-	Change Management and Organization Development