



## Department of Facilities Management

### **POLICY & PROCEDURE DOCUMENT**

NUMBER: 1.010

DIVISION: Department of Facilities Management

TITLE: Reimbursement of Expenses

DATE: May 1, 2009

REVISED: N/A

Policy for: All Department of Facilities Management Employees

Authorized by: Director Facilities Management

#### **I. Purpose and Scope**

The Department of Facilities Managements (DFM) intents to encourage both the systematic development and enhanced job performance of employees; support management objectives; and further contribute to recognize the professionalism of the workforce. To that end, DFM will to the extent set forth in this policy; reimburse expenses related to obtaining or maintaining licenses or certifications for DFM employees who meet the designated eligibility requirements.

#### **II. Policy**

This policy permits DFM to pay for employees to obtain and maintain licenses, certifications, and examinations to obtain such credentials. This authority is discretionary and not an entitlement or benefit of employment. This policy amends any perceived or written action plan concerning reimbursement of expenses to obtain and maintain professional credential or licensing expense. This policy will remain in effect until rescinded or superseded.

#### **III. Procedure**

##### **A. Reimbursement of certification/licensing expenses**

1. Subject to the availability of funds
2. Made on a first-time, first-serve basis
3. Limited, where a certifying/licensing authority charges a higher amount to non-members, to the amount charged to members.
4. For requests totaling over \$100 for a single certification/license, the commitment to reimburse costs must be approved in advance by the Facilities Safety & Training Manager.

- a. A completed Claim for Reimbursement
  - b. A receipt of each item claimed
  - c. Proof of issuance of certification/license
- 5. Reimbursement will be considered for the following expenses related to obtaining approved licenses or certificates
  - a. Examination fees (limited to those exams in which a passing score is achieved)
  - b. License/certification fees (initial, renewal, registration)
- 6. DFM will reimburse for covered costs of licensure or certification may be made only for those costs incurred on or after May 1, 2009. Retroactive payment for costs incurred prior to this date is not authorized.
- 7. DFM will not pay or reimburse for the following expenses
  - a. Employee's membership fees in societies of professional associations
- B. Employee Eligibility
  - 1. To receive licensure/certification sponsorship under this policy, an employee must meet the following provisions
    - a. Be a full-time employee of DFM
    - b. Personnel must occupy a full-time established position, and/or have participated in the creation of a personal career broadening plan
    - c. Others will be considered on an exception basis, with endorsement of the Facilities Safety & Training Manager
    - d. The employee must be performing at the acceptable level. The employee's most recent performance appraisal must have a rate of fully satisfactory
- C. Review and Modification
  - 1. This policy shall be reviewed at least annually, and amended by DFM team, as required
  - 2. Requests to modify this policy must be forwarded DFM team for their consideration and approval

#### **IV. Exclusions**

#### **V. Related Policies**

Finance and Administration 4.4300, Compensation for Education and Special Training

#### **VI. Reason for Revision**

#### **Appendices:**

- A. Professional Certifications/Licenses Covered by this Policy
  - 1. A job-related certification/license is one which
    - a. Maintains or improves the professional certification status required for the employee's current job, or directly relates to or enhances the current job assignments, duties, and responsibilities, or meets the express requirement of Facilities Management that are imposed as a condition of continued employment.
  - 2. A career-related examination is one which
    - a. Increases the opportunity for advancement within a title series, or increases the opportunity for advancement to promotional positions outside of the

current title series, or enhances an employee's ability to acquire certification/license in an entirely different occupation, for which there is a current Facilities title

B. Cost and Fees that are not reimbursable

1. Costs and fees not reimbursed by this program include, but are not limited to, examination/licenses fees leading to a career that does not exist at WKU Department of Facilities Management, or fees for examinations leading to college credit for life experience. Books or manuals required for the course, travel expenses; i.e., fuel costs, car rental, hotel, meals, etc.

C. WKU Affiliations

1. The University retains no risk or liability with any certifications and licenses paid for by Western Kentucky University when such credentials are used by the employee outside of their regular work hours for WKU

D. Master Licensing Reimbursement. DFM provides reimbursement for all employees who require a license to legally perform their current job. For employees who would like to pursue their masters' license, the following legal guidelines must be followed, pursuant to the State of Kentucky

1. The master license company name must indicate Western Kentucky University
2. The license is to be used for the sole purpose of Western Kentucky University
3. A master license is for one (1) exclusive company and only one (1) company, unlike a journeyman license which allows up to three (3) employers per licensee.
4. License may not be used or associated with any other personal employer or company other than Western Kentucky University
5. If an employee currently holds a master license and uses the license on personal time, the license yearly fee legally cannot, and will not be reimbursed unless the employee names Western Kentucky University as their exclusive employer.