

Municipal Executives Association (MEA)

2023 Management Training Fund Questions and Answers

General Questions

- 1. Is training considered "tuition reimbursement"?**
 - Yes, all tuition-related requests should use "Tuition Reimbursement" as the business purpose.
- 2. When is an employee eligible to submit a training reimbursement request?**
 - Any employee who regularly works at least twenty (20) hours per week with a minimum of one (1) year continuous service in any classification represented by MEA at the time of application is eligible for Management Training Fund reimbursement.
- 3. Does an employee have to have one year of MEA membership to qualify for reimbursement on conferences and travel expenses?**
 - Yes, per the MEA-City MOU, any employee who regularly works at least twenty (20) hours per week with a minimum of one (1) year continuous service in any classification represented by MEA at the time of application is eligible for Management Training Fund reimbursement.
- 4. Does performing as an acting manager qualify as time served?**
 - No, Acting Assignment does not qualify as being in the MEA represented position.
- 5. If an employee is not qualified yet, can they access the Local 21 funding?**
 - If the employee is in the MEA bargaining unit, the employee cannot submit a request to use Local 21 Employee Development Funds.
- 6. How long does the approval process typically take?**
 - For initial equipment requests, it can take a couple of months after the system opens on 8/7 but all non-equipment requests take a minimum 10-business days.
- 7. If there are no department funds available, can we use per diem for work-related meetings?**
 - No, the use of Management Training Funds per diem is for when an employee is traveling on approved training, conferences, etc. Per the MEA-City MOU, Management Training Funds may not be used for food. The City shall not utilize the funds to supplant existing budgeted training programs.
- 8. Can we only use MEA training funds if there are no departmental funds available?**
 - MEA represented employees, who are eligible, can use Management Training Funds for professional development opportunities which are intended to allow employees to improve job performance.
- 9. Can departments allocate additional professional development or travel funds if MEA limit is insufficient?**
 - Yes, per the MOU, solely at the discretion of the appointing officer or designee, such funds may be supplemented with department funds budgeted for training, subject to the restrictions of applicable law. No reimbursement shall be made for expenses that are eligible for reimbursement under a Federal or State Veterans benefit program or from other public funds.
- 10. Is per diem an allowable cost?**
 - Travel reimbursement rates shall be as specified by the Controller's Accounting Policies and Procedures memo; however, a \$50 per diem allowance may be submitted when traveling on approved training. Management Training Funds may not be used for food.
- 11. Are there different criteria on types of drinks that are reimbursable depending on departments? Do some departments have a policy that prohibit employees from purchasing soda/sugary drinks using City funds?**
 - The MOU prohibits the use of Management Training Funds for food, including beverages.
- 12. Has there been any discussion on raising the limit?**
 - Yes, and raising the limit can only be done through collective bargaining of the MEA-City MOU.
- 13. Can DHR identify when an employee is eligible for reimbursements?**
 - The system can identify when an employee is eligible for tuition-related reimbursements based on your [MOU](#) and time of service. An error message will pop up if an ineligible employee attempts to submit a request. Please contact DHR if you believe an error message stating ineligibility is incorrect.

14. What is the maximum allotted amount for reimbursement per event?

What is the MEA reimbursement limit per year, outside of the \$1,000 for tech equipment?

- MEA represented employees can use the Management Training Funds for professional development opportunities which are intended to allow employees to improve job performance. Per the MEA-City MOU, until such funds are exhausted, an employee may utilize up to a maximum of \$2,000 per fiscal year for tuition, internal or external training programs, professional conferences, executive coaching, and professional licenses, certificates, and association memberships, professional software, and books and subscriptions.

15. Are there any vendor restrictions or limitations?

- There are no limitations. The vendors just need to be a legitimate business.

16. Why does SFMTA have their own policy?

- MTA has their own MOU and separate negotiated Management Training Fund.

17. Does equipment need to be returned at the end of the FY?

- Personal electronic equipment is to be used in the performance of the employee's City duties. Reimbursement is limited to no more than one device per employee per fiscal year. Equipment is meant to be used for work purposes, but the employee does not need to return it if reimbursed from the management training fund under the MOU.

18. Do equipment requests still have to be reviewed by departmental managers before MEA will review?

- Equipment requests are reviewed and approved by MEA.

19. How quickly do MEA funds run out each year?

- Equipment allocation is exhausted in the first 2 months after the system opens, however, the training fund tends not to be exhausted.

20. When are first time equipment requests reviewed?

- First time equipment requests are reviewed starting in September.

21. Is there any order of acceptance on requests, (repeat customers versus first-time requests)?

- Yes, first-time requests are prioritized. [See Equipment Policy.](#)

22. How are requests prioritized?

- First-time requests are prioritized. [See Equipment Policy.](#)

23. How can an employee confirm that they are on the list?

- An employee can [verify the status](#) of a request in Peoplesoft.

SF People & Pay

24. Where can an employee send follow-up questions?

- Employees can reach out to the [SF Employee Support Team](#) for follow-up questions regarding tuition reimbursements.

25. When can we submit for equipment?

- The system will open on Monday, August 7th for all submittals.

26. Is the creation of an account necessary to submit a request?

- DHR no longer needs to create accounts because employees submit directly in the Portal.

27. What if your HR Supervisor is not set up correctly in the system?

- If you have not submitted your request, please contact your department's human resources team to correct the information in SF People & Pay. If you've already submitted your request, please reach out to your [department representative](#) to reroute your Expense Report to the correct HR Supervisor. We also advise that you contact your department human resources team to correct the information in SF People & Pay for future requests.

Expense Authorizations

28. How do you submit a tuition reimbursement request?

- Click the Request Expense Authorization link under your Employee Links of the SF Employee Portal to submit a tuition reimbursement request. Please review the [How to Request Pre-Approval for Tuition Expenses](#) solution article (accessible through the Portal) to ensure you have all the information required before starting your request.



29. Does an employee need to submit a receipt for the pre-approval?

- Pre-approval is required before the purchase. Supporting documentation for an expense authorization includes the description of the equipment from a legitimate business and cost of the requested item.

30. Can you request reimbursement for equipment, training and travel in the same FY provided the limits are met?

- Yes, employees can submit expense authorizations for equipment, training and travel in the same fiscal year provided the limits are met.

31. For attending a conference in the first few months of this FY, when can I submit the expense authorization request?

- The system opens for submittals on August 7, 2023.

32. What date range do you enter for an equipment request?

- You can enter a current or future date for Date From, and whatever value you enter in the Date To filed will reset to the end of the fiscal year, e.g., 6/30/24.

33. Do we need to put a date at least 6 weeks after the Expense Authorization submission date? So if we submit on 8/7/23, the "Date From" needs to be on or after 9/18/23, correct?

- You can enter a current or future date for Date From, and whatever value you enter in the Date To filed will reset to the end of the fiscal year, e.g., 6/30/24.

34. Can an employee request travel reimbursement for one conference, but use the pre-approval for another conference?

- No, Pre-approval for the conference/training is for the one submitted and there are no substitutions. The employee will need to cancel and re-submit for the intended conference/training.

35. Can an employee submit multiple pre-approval requests at once, as long as it's under the allotted amount per Union member?

- Separate items should have their own expense authorization ID number because an employee cannot request reimbursement until all items are complete. If it's for a conference, the employee can include the registration, travel/lodging, etc. related to the conference under one expense authorization ID number.

36. What if the conference details are not yet ready by the time the request for travel pre-approval is submitted?

- Supporting documentation is required for MEA's review, including documentation for travel to/from the conference.

37. Do MEA's tuition funds cover a union member's language training/education and its travel cost? For example, if I go to Mexico for an intensive language course, can tuition fee, travel, and lodging be reimbursable?

- Use of the Management Training Fund is for professional development opportunities are intended to allow employees to improve job performance. Employees can submit an expense authorization for MEA's review and determination.

38. If you have annual certification fees, can we submit a request in advance and provide proof of payment after?

- You submit an Expense Authorization for pre-approval prior to paying for the certification fee. Upon receiving pre-approval then you can purchase/pay for the certification fee. Advance pre-approval is required prior to incurring the expense. Proof of payment is required for the expense report to be reimbursed.

Expense Authorizations-Equipment

39. Can MEA provide reimbursement for equipment purchases already made?

- No, Pre-approval of expense authorizations is required prior to purchase/incurred expense.

40. Does an employee need to have quotes for phone purchases?

- Yes, quotes and descriptions from a legitimate business for all Expense Authorizations are required.

41. If the equipment costs more than \$1,000, do you share a screenshot of the cost and then just apply for \$1,000?

- Yes, include a screenshot of the equipment at its cost, and submit an expense authorization within the \$1,000 per employee fiscal year limit based on the [MEA MOU](#). Employees can pay the difference out of pocket if the total exceeds the maximum allowable reimbursement.

42. For equipment, can you split the maximum reimbursement into multiple items?

- No, equipment requests are limited to one equipment per fiscal year per employee.

43. When requesting approval for purchasing equipment, should the employee include tax?

- Yes, all requests should include estimated tax. The corresponding expense report (reimbursement) is limited to pre-approved amounts.

44. If you are approved for a phone, and a newer model becomes available during the 60-day purchase timeframe, can you purchase the newer model?

- An employee can purchase the new model within the 60-days timeframe, as long as it is already pre-approved and the same type of equipment. For example, an employee cannot swap a cell phone approval for a laptop/tablet or vice versa.

45. Are extended warranties or accidental damage replacement costs covered if it is part of the equipment purchase?

- No, warranties are not eligible for reimbursement.

46. Does an Apple Watch count as a tablet or phone, or is considered an accessory?

- Apple Watch is an accessory and not eligible for reimbursement through the Management Training Fund.

47. Do you need to indicate the location as the city you will be purchasing equipment purchases?

- Employees can list the city where equipment was purchased as the location.

Expense Reimbursement

48. If an employee does not copy a request from the expense authorization, will DHR reject it?

- Yes, DHR will send back the request. The expense report must be copied from the expense authorization.

49. How does an employee file expenses that do not have receipts (parking, transit, etc.)?

- Supporting documentation must be included to justify the cost of the expense.

50. If an employee pays for a one-year 8-course class, do they need to complete all 8 courses prior to requesting reimbursement, or just after completing the first course?

- Yes, the employee will need to complete eight courses and show proof of satisfactory completion and proof of payment to be reimbursed.