

APPENDIX F
EDUCATION FUND PROCEDURAL GUIDELINES

- DATE: March 15, 2018
- SCOPE: These guidelines apply to all full-time Academic Advisors, Counselors and Faculty (ACF) at Metropolitan Community College
- PURPOSE: To establish procedures for submitting, evaluating, and processing requests for funds to assist in paying tuition expenses related to the furtherance of ACF members' learning and education if the furtherance of these bears a significant relationship to increasing the skills and/or knowledge of the ACF employee in a manner that is beneficial to the College.

1. General Policy Statement

Metropolitan Community College Area (hereinafter "College") and the Metropolitan Community College Education Association (hereinafter "Association") believe in life-long learning. It is their mutual goal to develop a better educated and more highly skilled workforce in order to better serve student and consumer needs. One avenue of support for employees is provided through an education fund for employees who satisfactorily complete courses that benefit the College in accordance with these guidelines.

2. Employee Eligibility Criteria

In order to apply for education funds under these guidelines, an employee must have satisfactorily completed two years of continuous service as a full-time regular Academic Advisor, Counselor, or Faculty member by July 1 of the fiscal year in which the education assistance is granted. When determining if a faculty member has met the service requirement, he/she must have completed at least 3 full quarters totaling 49.5 ECH of a teaching load during the first year of his/her teaching contract. This applies to both 9- and 12-month contracts.

Employees on disciplinary probation are not eligible to apply for education funds.

Individuals who have been awarded sabbaticals may not receive education assistance during the fiscal year in which the sabbatical is taken.

3. Funding

The sum of \$15,000 will be allocated annually to the education fund. These funds will not be attributed to "total package" when bargaining negotiated agreements. "Total package" means the total increase in salaries and benefits negotiated between the Association and the College.

In the event that the entire \$15,000 education fund is not used in any given fiscal year, the amount remaining does not carry forward to subsequent years.

4. Tax Considerations

Metropolitan Community College will comply with Federal and State law concerning tax treatment of employer reimbursement under education assistance programs.

5. Application Procedure

- A. An employee must complete an application for education assistance and submit it to the Human Resources Office, along with copies of the course description for each course for which the applicant requests education funds. Application forms are available only during announced application periods. The url for the *Education Fund Application* will be provided in an email to the Academic advisors, Counselors, and Faculty prior to the start of the application period.
- B. Courses that begin prior to the start of a fiscal year for which education assistance requests are being submitted but end after the beginning of the applicable fiscal year may be considered for education assistance.
- 1) For example, a course that starts in late May or June 2023 but ends after July 1 would qualify for consideration for 2023-24 program funds. However, a course that starts in May or June 2024 could not be counted toward the 2023-24 program year.
 - 2) To ensure that monies are charged against the correct budget year, all reimbursement requests to program participants must be submitted by June 30 of the applicable program year. See further details in section 6.A.
- C. Any education assistance received is intended to assist the recipient pay tuition expenses. No student fees, course fees, books, supplies, parking fees or other expenses are eligible for reimbursement. Expenses related to licensure or certification renewal are not eligible for reimbursement.
- D. Applications for education assistance must be received on or before July 5th. If the entire education fund is not allocated by November 1, a second application period will be opened. During the second application period, applications for education assistance must be received on or before December 1.
- E. Once received and logged, Human Resources will forward the applications to the education review committee. All applications shall be reviewed by the education review committee within 30 days of receipt of applications (i.e., July 30 and December 30). The education review committee will consist of two College representatives and two Association representatives. Applications may only be approved by a majority of the committee.
- F. The education review committee will decide the dollar amount to be awarded. Education that enhances a person's current job performance will receive greater consideration than coursework that is for personal enrichment.
- G. Coordination of Benefits – Double-Dipping Not Allowed: Education assistance will not exceed 100% of the total cost of tuition from all sources of tuition monies combined; for example,

scholarship, fellowship award, GI benefits, grants, or a similar program.

- H. Course Substitutions Requested After the Application Is Approved - Once funding has been approved, education fund applicants must seek and receive approval to substitute a class in advance of registration. Failure to do so may result in revocation of the previously granted funds. Requests for course substitutions should be sent to the Associate Vice President for Human Resources or designee.
- I. Any employee granted education assistance will be required to sign an agreement stating that he/she will continue employment at the College for the specified period of time after receipt of the education assistance. If the employee fails to continue employment for the specified time, he/she will make restitution to the College for the education assistance received as follows:
 - 0 years if the amount received is less than \$500 in an academic year;
 - 1 year if the amount received is between \$500-\$1,500 in an academic year;
 - 2 years if the amount received is between \$1,501-\$2,500 in an academic year;
 - 3 years if the amount is greater than \$2,500 received in an academic year.
- J. Restitution will not be required in the case of employees who are approved for disability benefits, non-renewed, reduced-in-force, or dismissed, or in the case of the death of the employee within the first three academic years after the award of education assistance.
- K. Application does not guarantee reimbursement.

6. Reimbursement Procedure

- A. Within fifteen (15) days after the approved course has ended, the employee must submit to Human Resources a copy of the grade report or transcript of grades and the original receipt or other official document showing a breakdown of tuition and fees so that the reimbursable tuition allowable under these guidelines can be identified. The Human Resources Office will review the submitted documents and, if consistent with these guidelines, authorize payment and forward the appropriate financial documentation (without grade records) to the Business Office for processing.
- B. Reimbursements will be processed through the College's payroll system. Normal deadlines and pay cycles for processing will apply.
- C. If the employee does not successfully complete the course according to the criteria outlined in these guidelines, no reimbursement will be provided.
- D. Class attendance and completion of study assignments are to be accomplished outside of the employee's regular working hours.
- E. In order to receive reimbursement, the employee must satisfactorily pass the course. "Passing" means a grade of "C" (not a "C-") or better at the undergraduate level and a grade of "B" (not a "B-") or better at the graduate level. For pass/fail courses, only "pass" grades will be eligible for

reimbursement.

- F. An employee who ceases to be employed by the College for any reason during the period of the course or prior to submitting complete reimbursement documentation will not receive or be eligible for reimbursement.