

Tuition Reimbursement Program

The Board of The Independence Center values staff who have acquired experience and knowledge that supports providing the best services possible to the people that we serve. To that end, the Board has agreed to set aside funds each year (as they are available) to assist staff in furthering their education. This assistance comes with an expectation that when you leave The Independence Center you will continue to use the knowledge you have gained to create an accessible and inclusive community for people with disabilities, no matter where you go.

I. Purpose

The IC wants to encourage and assist its staff in improving their educational qualifications in subjects and fields of endeavor which are directly related to the organization's operations, activities and objectives and which will place the employee in a position to improve their job performance and professional development. This procedure outlines the Education & Tuition Reimbursement Policy for graduate and undergraduate courses.

II. Eligibility

Any employee working a minimum of 20 hours, who has been employed with the IC for more than six months prior to the application date, and is in good standing (i.e. positive previous review, no disciplinary/adverse action for the previous six months, etc.) is **eligible to be considered** for tuition assistance.

III. Criteria

- a. Course work must have direct relevance to the current job being performed, to expected future responsibilities, or be part of a relevant degree program and be determined to be beneficial to The IC presently or in the foreseeable future.
- b. Current budget constraints need to be taken into account. The yearly amount of available funds for education & tuition reimbursement is made at the discretion of the Board of Directors.
- c. Applicants need not be pursuing a degree to apply for education & tuition reimbursement.
 - i. Staff in a non-skilled position can take classes to become a licensed caregiver.
 - ii. Staff may take a course or class that does not meet over a quarter/semester period.
- d. To be reimbursed, a passing grade is required for each course. A passing grade is considered a "C" or better. Pass/Fail classes are acceptable.
- e. Employees are eligible to receive reimbursement of their out-of-pocket tuition costs for up to 70% of the tuition expense (minus any reimbursement or payments made from other sources defined as money not required to be paid back such as scholarships, grants, stipends, financial aid, etc.), per semester, based on the number of applicants, with a maximum of \$1,000.00 per semester and \$3,000.00 per year per individual. Books, registration, fees, mileage, etc. are the sole responsibility of the employee.
- f. Upon completion of course work, employees are encouraged to consider testing that may grant certification or licensing. Employees may also consider testing in lieu of course work. If a passing grade is received, The IC will reimburse the cost of the testing up to 70%.

- g. Application timeframes:
 - Applications for Summer Semester must be submitted between May 1-20.
 - Applications for Fall Semester must be submitted between August 1-20.
 - Applications for Spring Semester must be submitted between January 1-20.

IV. Application Process

Employees must complete an Application for Tuition Assistance (attached) and return to their Supervisor in the timeframe stated above. The application will be taken to the Employee Education Fund Committee for approval. Careful consideration will be taken as to the relevance of course material or degree program, the needs of the organization, reasonable and realistic opportunities for advancement and the funds available for education. Applicants will be notified of the Employee Education Fund Committee's decision by the 15th of the month following application.

Reimbursement will be made **after** a course has been completed and grades and proof of payment have been submitted to the employee's Director.

The Employee Education Fund Committee will be made up of current The IC Directors, who will make their recommendation to the CEO on tuition reimbursement recipients.

V. Work Time

Classes may not be taken and course work may not be done during work hours and should not interfere with an employee's normal work schedule or responsibilities. It is the responsibility of the employee to coordinate their schedule appropriately.

VI. Taxes

According to current IRS regulations, reimbursements exceeding \$5250 annually are subject to stricter requirements. In that situation, course work must be directly related to current job responsibilities. If not, any amount over \$5250 may be taxable to the employee.

Tax laws change regularly in this area. Employees need to be aware that Education Reimbursement may be a taxable benefit under the Internal Revenue Code and may be subject to withholding and certain other deductions. It is the employee's responsibility to understand their own tax situation.

VII. Leaving The IC Prior to Class Completion

Leaving The IC (resignation/termination) prior to the completion of any course will make the employee ineligible for reimbursement.

Application for Tuition Reimbursement

Name: _____

Contact Information (address/email): _____

Job Title & Department: _____

Course/Degree Program/Certification Applying for: _____

Anticipated Tuition Cost for Semester: _____

Anticipated Class Start and Completion Dates: _____

Name & Location of Institution: _____

Explain how this course/degree relates to your current job function (or in the foreseeable future) and The IC's mission:

Applicant Signature: _____ Date: _____

Manager's Signature: _____ Date: _____

Director's Signature: _____ Date: _____

Date HR receipt of request: _____

-----This Section For HR Use-----

After discussion with Directors/CEO this application is:

_____ Approved _____ Disapproved

Reason for Disapproval: _____

CEO Signature: _____ Date: _____