

## TUITION REIMBURSEMENT PILOT PROGRAM

The San Mateo County Community College District recognizes and supports the need for the continued professional growth of its staff. It is the intent of this program to encourage and support educational opportunities of employees that will benefit the District, further the District's mission and strategic goals, enhance employees' current job performance, and improve options for career advancement at the District. Tuition reimbursement will be provided for pre-approved educational courses that are related to any employment available at the District and are part of an associate's, bachelor's degree or master's degree program. Tuition reimbursement shall be subject to the availability of funds and shall be limited to the cost of tuition for the degree program as described in this program.

### Eligibility

In order to participate in the program, an employee must:

1. Be a permanent classified, management, or supervisory employee of the District;
2. Work full time;
3. Have completed 18 months of continuous employment (following the probationary period);
4. Have an overall job performance evaluation of "Exceeds Expectations" or higher in their current position; and
5. *Not* have any disciplinary action within 24 months of the employee's application for tuition assistance or any disciplinary pending; and
6. Not need changes to his/her work schedule that would have a negative impact on the employee's job duties or department; and
7. Take course(s) are relevant to career path at the District.

Eligibility for the Tuition Reimbursement Program shall cease during any period in which the employee is on any type of leave for more than 30 days unless such leave is granted for professional or educational purposes related to the job.

An employee is no longer eligible for tuition reimbursement if the employee:

- a. Is no longer a full time employee;
- b. Receives any job-related discipline before receiving the reimbursement;
- c. Receives an overall job performance evaluation of less than "Meets Expectations" in their current position before receiving the reimbursement'
- d. Receives a grade below "C-" in any class for which reimbursement is sought.

In exceptional circumstances a college president or Vice Chancellor (in the case of District Office personnel and college presidents), may, on behalf of an employee, request a waiver of one or more of the eligibility requirements. The request for waiver, which shall include an explanatory justification, must be submitted to the Vice Chancellor, Human resources for approval.

### Eligible Coursework

Requests for tuition reimbursement must be for credit courses that are directly related to any employment available at the District and are part of an associate's, bachelor's degree or master's degree program. Coursework undertaken by an employee for self-enrichment does not qualify.

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Courses eligible for reimbursement must be for college credit(s) from an accredited, degree-granting college or university. This includes classroom and on-line courses. Associate degree level coursework taken at an institution outside of the District shall only be reimbursed when the equivalent course is not offered at a District college. No auditing of courses is permitted.

Courses and expenses that do not qualify for reimbursement include, but are not limited to:

- Certification or accreditation courses, workshops, seminars (e.g., forklift, NKBA) taken to meet job requirements but not taken towards the completion of a degree
- Review courses taken in preparation for testing and exams
- College entrance and qualifying exams (SAT, GRE)
- Courses audited without college credit
- Equivalence exams; life experience credits
- Standardized tests to earn college credit by examination offered by the College
- Level Examination Program (CLEP) or other exams that waive a requirement
- Education involving sports, games or hobbies
- Phd, doctorate or other comparable-level coursework
- Books, equipment, payment plan option fees

### **Reimbursement Approval Process**

Requests for tuition reimbursement must be made, and approval granted, prior to the start of the course. The approval process is as follows:

1. **Application Deadline.** An eligible employee must complete a [Tuition Reimbursement Pilot Program Application and a Tuition Reimbursement Pilot Program Agreement](#) and submit these forms along with material describing the course and/or program to his/her immediate supervisor for initial approval. Applications for coursework beginning between January and June must be submitted no later than November 1, and applications for coursework beginning between July and December must be submitted no later than April 1.
2. **Supervisor Approval.** The supervisor shall review the Tuition Reimbursement Pilot Program Application to determine (i) District relatedness, (ii) benefit to the institution, and (iii) that the proposed coursework meets the criteria for reimbursement. The supervisor shall forward all approved Tuition Reimbursement Applications along with all supporting documentation to the institution's appointing authority (College President or Vice Chancellor, or his/her designee) for approval.
3. **Final Approval.** The appointing authority shall forward the Tuition Reimbursement Application to the Vice Chancellor, Human Resources, for final approval. If the request is rejected, the request shall be returned to the employee indicating the reasons(s) for the denial.
4. **Notification of Approved Application.** Once final approval has been granted, the approving institution shall provide the employee, the employee's supervisor and the institution's appointing authority with written notification of the authorized coursework. A copy of the approved Tuition Reimbursement Application and a Tuition

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Reimbursement Agreement shall be provided to the employee along with the written notice.

5. Qualifying Grade and Submission of Reimbursement Request. Within 30 days of completion of the course with a qualifying grade, as set forth in this policy, the employee must submitted the completed [the tuition reimbursement pilot program application section I and II](#) with the supporting documentation demonstrating successful completion of the course and paid tuition bills.
6. Appeal of Denial. If a Tuition Reimbursement Application or Tuition Reimbursement Request is denied by a supervisor, the Employee can appeal the decision to the College President/Vice Chancellor, who shall make the final decision. There shall be no further appeal.

### Reimbursement Amounts

1. Tuition reimbursement shall be limited to amount required to complete the applicable degree program, capped at the amount charged by University of California for “in-state” tuition. As of December 2015, this amounts to \$53,600 for an undergraduate degree<sup>1</sup> and \$22,440 for a graduate degree<sup>2</sup>. These amounts will be adjusted when the University of California amounts are adjusted.
2. Subject to the limits set forth above, an employee shall be reimbursed 100% of the cost of the course for courses taken and completed with a final grade of “C-” or better. An employee cannot receive a reimbursement for courses taken and completed with a final grade of less than a “C-.”
3. In cases where the grading system is required to be Pass/Fail, Satisfactory/Unsatisfactory, etc., an employee will be reimbursed 100% of the cost of the course taken and completed if the employee receives the grade that gives credit for the course. **No reimbursement will be given if an employee voluntarily elects to take a course “Pass/Fail.”**
4. Reimbursement shall be for tuition costs only. Expenses associated with fees, travel, books, or incidental items are non-reimbursable.
5. Reimbursement for courses taken more than once will not be provided.
6. **The provision and amount of tuition reimbursement shall be subject to the availability of funding and be based upon institutional priorities.**

### Continued Service Requirement Upon Receipt of Reimbursement

If an employee leaves their employment with the District, voluntarily or involuntarily for any reason, before completing 5 years of service for undergraduate program and/or 3 years for graduate program, after the final tuition reimbursement amount was received, the employee will have to repay the District as follows:

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<sup>1</sup> Calculation based on the current tuition of \$13,400 per year for a 4 year undergraduate degree program.

<sup>2</sup> Calculation based on the current tuition of \$11,220 per year for a 2 year graduate degree program)



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**For Graduate Programs:**

<u>Years of Service after final reimbursement payment</u>	<u>Reimbursement Amount to be Repaid</u>
3 years or less	100%

**For Undergraduate/AA Programs:**

<u>Years of Service after final reimbursement payment</u>	<u>Reimbursement Amount to be Repaid</u>
2 years or less	100%
Between 2 years and 4 years	75%
Between 4 years and 5 years	50%

The District, at its option, may deduct the amounts due from the employee’s final paycheck. If this is not sufficient, the District reserves the right to pursue the outstanding debt using any legal means available.

**General Provisions**

1. Employees who receive a grade of "Incomplete" will not be able to continue in the assistance program or will be reimbursed only when the grade for the course has been changed to a grade of "C-" or better. In cases where the grading system is required to be Pass/Fail, Satisfactory/Unsatisfactory, etc., the employee must receive the grade that gives credit for the course.
2. Participation in credit coursework shall be considered voluntary. Voluntary education time occurring outside or after regular or normal work hours is not considered time worked.
3. Courses taken during work hours must have prior approval and cannot exceed 6 hours per week. They should not have a negative impact in the employee’s work or department by any agreement made. With prior approval, exceptions can be made for final exams or other special circumstances that would require an employee to be absent during his/her regular work schedule.
4. If at any time after receiving reimbursement it is determined that the employee and/or course was not eligible for reimbursement, the employee will be required to repay the District for the full amount of any such reimbursement.
5. Any falsification or misrepresentation of information will result in the denial of reimbursement and may be grounds for appropriate disciplinary action up to an including termination.

**INCOME TAX INFORMATION**

The taxability of the Tuition Reimbursement program is determined by federal regulations and is subject to change. If the benefits are considered taxable during a tax year (i.e., January 1 to December 31) they must under federal law be reported by the District as taxable income to the employee. According to current IRS guidelines, up to \$5,250 per calendar year paid to an employee by an employer for undergraduate and graduate-level courses is excludable from gross income. Tuition reimbursement benefits are taxable to highly compensated employees (HCEs). Employees earning \$115,000 or more in 2014 are HCEs. The HCE dollar amount is determined by the IRS.

***The District reserves the right to terminate, suspend, withdraw, amend or modify the Plan in whole or in part at any time.***