



TUITION ASSISTANCE POLICY

EFFECTIVE DATE: January 1, 2008

PURPOSE

This policy outlines tuition assistance for job related and career related education. Allocation of funding for job related or career related education is discretionary and is not to be considered an entitlement. Decisions will be made in consideration of campus strategic initiatives and institutional needs. Requests for tuition assistance may be denied at any point during the approval process. This policy describes fee/tuition reimbursement policies for authorized coursework for credit and training undertaken by various types of employees at UW-Green Bay. It does not address coursework or training under the faculty or academic staff professional development programs covered in [ACPS 3.0-3.4](#) or employer-directed training including meetings, conferences and workshops, (i.e. training paid directly by the employer). The provisions of this policy apply without regard to the source of funding; that is, to education supported through centrally administered professional development funds as well as support provided at the unit or other levels.

Authority for this policy is derived from the following sources:

- [UW System Financial and Administrative Policies, Educational Assistance for Faculty and Staff \(G25\)](#)
- [Unclassified Personnel Guideline #8](#)
- Wisconsin Administrative Code, Department of Employment Relations, Chapter ER 44
- Collective Bargaining Agreements
- Internal Revenue Code Section 127
- Wisconsin Department of Revenue Tax Regulations
- [Wisconsin Statutes](#), s. 230.05(2), Powers and Duties of the Administrator
- [Wisconsin Statutes](#), s. 230.06, Powers and Duties of Appointing Authorities

DEFINITIONS

Tuition assistance shall be defined as follows:

- **Job-related** - Credit and noncredit, undergraduate or graduate level noncredit or training that is required by the University, or by law or regulations, to maintain salary, status or current position (if the requirements serve a business purpose of the University), or taken to maintain or improve skills required in the employee's present work.
- **Career-related** - Undergraduate and graduate level courses and professional development courses which will qualify an employee for advancement. Courses for personal enrichment do not qualify.

Review Committee – A committee established to review tuition assistance requests consisting of the Provost and Vice Chancellor for Academic Affairs, Vice Chancellor for Business and Finance and the Assistant Chancellor for University Advancement. The Director of Human Resources serves as an ex officio non-voting member of the committee.



POLICY

It is the policy of the University of Wisconsin System to promote continuing education of employees. Employees may be reimbursed for authorized education and training within the constraints listed above and within budget constraints.

Employee Eligibility

- **Unclassified Employees** - An unclassified employee must have a 50% or greater appointment in a permanent position. Employees in short term or temporary positions are not eligible.
- **Non-Represented Classified Employees** – Employees must have a 50% or greater appointment and must have attained permanent status. Project employees, limited term employees, employees in training and student employees are not eligible.
- **Represented (Union) Classified Employees** – Tuition assistance for represented classified employees is governed by the applicable collective bargaining agreement.

Qualifying Coursework and Training

The Review Committee's decision to authorize tuition assistance should be based on the determination that successful completion of the course will be beneficial to both the University and the employee in terms of increased knowledge, abilities, skills and work performance. To qualify as reimbursable coursework or training, the activity must result in an academic grade or other formal certification of completion or accomplishment.

Examples of courses which are deemed to benefit both the University and the employee include:

- Courses which provide knowledge and skills directly related to maintaining or improving current job skills;
- Courses mandated by law or regulation in order for the employee to retain the job;
- Courses directly related to the profession in which the employee is currently working, current classification or classification series; and
- Courses which provide for career development within the University, including those which are a necessary elective for completion of such degree.

Tuition assistance may be denied in cases where the Review Committee determines that neither the course nor the degree pursued is of sufficient benefit to UW-Green Bay.

Institutions from Which Courses May be Taken

Coursework may be taken at any regionally accredited public or private higher educational institution. Coursework at UW System institutions is encouraged.

Credit Maximum

Normally, no more than five credits or its training equivalent may be authorized for an employee in any *funding cycle*. The start date of the course will determine which funding cycle the course will be part of.

The funding cycles are:

1. September through December
2. January through May
3. June through August

Additional coursework may be authorized by the chancellor or designee. Usually, employees attend courses on their own time. If, however, the class is available only during scheduled work hours, with the supervisor's approval, the employee may make alternative work arrangements or use paid leave time if departmental operations are not disrupted.



Reimbursement Rates and Source of Funding

Tuition and fees shall be reimbursed only upon successful completion of the course if the employee is still employed at UW-Green Bay. The maximum reimbursement is limited to 75% of the cost of tuition of undergraduate or graduate credits (excluding fees) at UW-Madison. The employee is responsible for a minimum of 25% of the cost for tuition. Tuition assistance from the central fund is limited to \$500 per fiscal year. The end date of the course determines which fiscal year the reimbursement will apply to. At the department's discretion, the department may reimburse up to 75% of the cost for tuition and fees at UW-Madison. The division head must identify the amount the division proposes to pay towards the cost of the course or education program prior to the commencement of the course or program. Segregated fees for UW-Green Bay classes are waived.

Administrative processing fees, books, supplies and travel costs are not reimbursable. If an employee changes jobs within UW-Green Bay prior to completion of an authorized course, s/he must notify Human Resources.

Termination of Employment

In the event of a voluntary termination, the employee agrees, by his/her signature on the Tuition Assistance Request form, to repay all tuition assistance reimbursements paid during the prior 12 months from the effective date of termination.

PROCEDURES

Requesting Advanced Approval for Tuition Assistance

Employees requesting tuition assistance must:

- Receive Review Committee approval prior to beginning the course and one month **prior to beginning of each funding cycle** (by August 1, December 1 or May 1).
- Complete the [Tuition Assistance Request form](#) available on the Human Resources website.
- Attach a fee or tuition statement (or estimate of costs) to the form.
- Attach a statement explaining completely how the course or training is related to the employee's current position or will provide job or career development including how the course of study will directly benefit UW-Green Bay.
- If the employee is pursuing a degree, an outline of the educational program must be submitted prior to initially starting the program.
- If the course or training taken is not through a UW institution, briefly explain why an alternative is not available at a UW institution or technical college.
- Route the authorization request form to the supervisor, division head, area leader and Human Resources.

Supervisor(s) approving employee's request for tuition assistance must:

- **One month prior to beginning of each funding cycle** (by August 1, December 1 or May 1), review and either approve or deny the Tuition Assistance Request.
- Ensure a fee or tuition statement (or estimate) and outline of educational program, if applicable, is attached to the form.
- Attach a statement from the supervisor explaining how the course or training is related to the employee's current position or will provide job or career development including how the course of study will directly benefit UW-Green Bay.
- Route the authorization request form to the division head, area leader and Human Resources.

Employees will be notified of the Review Committee's decision as soon as possible.



Requesting Reimbursement for Tuition Assistance Expenses

Employees requesting reimbursement for tuition and fees must:

- Complete a copy of a [Travel Expense Report \(TER\)](#) (Form UW-18).
- Attach a copy of the grade report or notice of successful completion of the course or training, a copy of the tuition/fee payment receipt and the original Tuition Assistance Request form that was approved.
- Route the TER to the supervisor and/or division head for signature.
- Route the completed TER to Human Resources for final approval.

Note:

The taxability of reimbursements is subject to the existing provisions of Section 127 of the Internal Revenue Code. Employees should be advised to obtain tax counsel as to the reportability and deductibility of educational expense reimbursements. Generally, educational expenses qualifying as job-related are not reportable by the University as income to the employee.

Requests for reimbursement which do not include all of the above requirements will not be processed. Questions concerning this policy should be directed to the Human Resources Office at 465-2390.