



EMPLOYEE EDUCATION ASSISTANCE POLICY

Allegiance STEAM Academy–Thrive’s (ASA) Employee Assistance Policy is designed to help attract, hire, and retain highly qualified staff. Additional training, credentialing or certification stimulates creative thinking, offers new approaches and allows for increased teacher professionalism. All of these concepts benefit our students.

The Employee Educational Assistance Policy provides eligible employees with the opportunity to obtain, maintain, or improve job related skills and competencies through participation in courses of study or credentialing programs that directly relate to the benefit of the organization provided the CEO or designee have given prior approval.

The CEO or designee will consider the request for course(s) approval, along with the availability of funds when the request is first received. The CEO or designee will approve up to \$65,000 each fiscal year for all employee assistance requests.

Employee Eligibility

Educational assistance is available to teachers and staff, with satisfactory performance, who have been continuously employed for at least one year and continue to be employed, with satisfactory performance, during the duration of the course(s).

Course Eligibility

All approved course(s) must meet the following criteria:

- Must be in a specific job related field or professional discipline that directly relates to the programs offered at ASA
- Must provide employee with skills, knowledge and competencies applicable for their current position or another position with ASA
- Course(s) must be taken during non working hours unless prior approval is obtained from the CEO or designee
- Participation in any course(s) may not in any way interfere with the employee’s ability to perform his or her job
- Be approved by the CEO or designee prior to reimbursement

Professional Certification, Undergraduate or Graduate Program

- Programs leading to professional certification or degree, including college units toward the completion of a bachelor, masters, PhD, EdD, or California teacher credentialing program, must meet the criteria in section 1 above
- Course(s) within the program that are unrelated to the employee's job may not be reimbursable even though the course(s) may lead to a degree that may be job related.

Education Assistance Reimbursement Amounts

The maximum tuition and fee reimbursement for professional certification, undergraduate or graduate programs is not to exceed a \$5,000.00 annual and \$15,000 lifetime cap.

If it is advantageous to ASA the CEO may approve full or partial advance payment to the educational institution on behalf of the employee. If this occurs, the employee will sign a promissory note agreeing to reimburse ASA for the sums advanced. All sections of the Employee Education Assistance Policy are still applicable.

Eligible Expenses

In order to be eligible for reimbursement, an employee must first obtain the CEO or designee approval for the course(s) prior to enrollment. The CEO or designee must review and certify that the course(s) for which the employee is applying meets the specified criteria.

For professional certification, an undergraduate or graduate program the employee is eligible for up to 90% of their tuition, textbooks and materials costs not to exceed the annual cap of \$5,000 and lifetime cap of \$15,000.00. Program reimbursement costs will be reimbursed only after successful completion of the course(s) with a final grade of "B" or equivalent, or higher.

- The employee within 60 days of completion of the course(s) must submit a copy of the final grade, or certificate of completion; and proof of payment to the Business Services office for reimbursement.
- In the event of a layoff or termination due to job elimination, or school closure, or other business conditions the employee has no control, the employee maintains eligibility for reimbursement at the completion of the course(s), as long as the course began prior to the layoff or termination. If a professional certification, undergraduate or graduate program has been approved by the CEO or designee, the employee maintains eligibility for the program only through the end of the fiscal year in which the event occurred.

Expenses Not Covered

- If the employee withdraws from the approved course(s); if the employee voluntarily terminates employment, or is terminated for cause, prior to completion of the course(s); if the employee fails to complete the course(s); if the employee is not performing satisfactorily at ASA upon completion of the course(s).
- If the employee receives duplicate or comparable fees from another institution or agency, grant, scholarship, or other financial aid, only the unpaid balance will be considered under this policy for reimbursement.

- The employee does not receive advance approval from the CEO or designee.
- The course(s) approved were not successfully completed within one year from the date the CEO or designee approved the request.

Tax Considerations

The taxability of payments under the Employee Assistance Policy is in accordance with Internal Revenue Service guidelines applicable at the time an employee applies for reimbursement of expenses. The payment of any taxes remains the responsibility of the employee.