



UTAH STATE BOARD OF EDUCATION

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MEMORANDUM

TO: Members, Utah State Board of Education

FROM: Angie Stallings, Deputy Superintendent
Policy and Communication

DATE: September 8-9, 2013

ACTION: Board Policy 3004 *Educational Assistance Program for Board Employees*

Background:

Board Policy 3004 establishes an Educational Assistance Program for Board employees, subject to budget availability. The program establishes:

- 1) the maximum amount of educational assistance allowed for an employee in any one calendar year;
- 2) who may qualify to participate in the program;
- 3) the allowable costs;
- 4) procedures for reimbursement of the educational assistance if the employee leaves the USBE within a certain amount of time after receiving reimbursement.

Board Strategic Plan:

This item supports the following imperative and strategies in the Board's Strategic Plan:

- Oversight - Monitor, review, and provide general supervision to all public education institutions and other entities for which the State Board has responsibility.

Anticipated Action:

It is proposed that the Law and Licensing Committee consider approving Board Policy 3004 *Educational Assistance Program for Board Employees*, and if approved by Committee, the Board consider approving Board Policy 3004.

Contact: Angie Stallings, 801-538-7550

UTAH STATE BOARD OF EDUCATION POLICY
Policy Number: Board – 3004
Policy Name: <i>Educational Assistance Program for Board Employees</i>
Date Approved:

By this policy, the Utah State Board of Education, “the Board,” establishes the Educational Assistance Program for Board Employees (educational assistance program), including the following internal rules and procedures:

1. Definitions:

- a. “Acceptable grade” means:
 - i. a “C” grade or better;
 - ii. a “pass” grade on a pass/fail system; or
 - iii. a “2.0” on a four-point grading system.
- b. “Authorizing member of the Superintendency” means the member of the Superintendency who authorizes an employee’s educational assistance agreement.
- c. Direct-report employee” means an employee who:
 - i. is one of the following:
 - A. the Superintendent;
 - B. the Deputy Superintendent of Operations;
 - C. the Superintendent of the Utah Schools for the Deaf and Blind;
 - D. the Board Secretary;
 - E. the Board Audit Director; or
 - F. the Board Public Information Officer; or
 - ii. reports to an employee described in Subsection (1)(c)(i).
- d. “Educational assistance agreement” means a contract between the Board and a Board employee for educational assistance.
- e. “Member of the Superintendency” means the Superintendent or the Superintendent’s designee.

- f. "Program" means a course or series of courses that lead to a degree, certification, or endorsement.
 - g. "Qualifying educational costs" means the cost of tuition and fees for the employee's enrollment in a job-related course or program.
2. The Educational Assistance Program is subject to the following requirements:
 - a. the maximum educational assistance allowed for an employee in any one calendar year may not exceed the lesser of:
 - i. half of the cost of the employee's course or program, including tuition and related fees; or
 - ii. \$5,250;
 - b. an employee requesting educational assistance shall disclose all sources of funding received for the educational program, including grants or scholarships received by the employee;
 - c. an employee's total reimbursement for qualifying educational costs shall be calculated based on only those eligible expenses directly paid by the employee that are not reimbursed or covered from another source; and
 - d. a member of the Superintendency may not allow a reimbursement unless the employee receives an acceptable grade in the course or program.
3. An employee of the Board may request to receive reimbursement for the employee's qualifying educational costs if:
 - a. Except as provided in Subsection (4), the employee completes an educational assistance agreement, approved by both the employee's supervising Director and a member of the Superintendency, prior to enrolling in the job-related educational course or program;
 - b. the employee:
 - i. is an employee of the Board at time of successful completion of the course or program;
 - ii. is a full-time or part-time benefitted employee;
 - iii. is not a time-limited or contract employee;
 - iv. is not on probation; and
 - v. is not on corrective action;
 - c. the employee pays the tuition and fees upfront.

4. For an employee who is a direct-report employee, the Board's audit committee shall approve the employee's educational assistance agreement in lieu of a member of the Superintendency.
5. If a course is included in the requirements for a degree, certification, or endorsement, the educational assistance agreement shall be for the full series of courses (program) that lead to the degree, certification, or endorsement and not for each individual course.
6. Before approving an employee's educational assistance agreement, the employee's supervisor and a member of the Superintendency shall ensure that the job-related educational course or program will provide a benefit to the state;
7. If an employee's request for educational assistance is approved, the supervisor of the employee shall make a record of the employee's educational assistance plan in UPM.
8. The Superintendent may reimburse an employee's qualifying educational costs for the approved course or program if:
 - a. the employee provides a tuition payment receipt with the employee's request for reimbursement; and
 - b. the employee submits a final grade report, demonstrating the employee's receipt of an acceptable grade in the course or program, with the request for reimbursement.
9. An employee who requests educational assistance shall consult with the employee's Section Director to ensure appropriate documentation and approvals are obtained.
10. Except as provided in Subsection (11), an employee who receives educational assistance shall remain employed by the Board for at least one year for each year of educational assistance received after the completion of the course or program.
11. If the employee does not remain employed with the Board for at least one year for each year of educational assistance received by the employee, after completion of the course or program, the employee shall repay the Board the amount of educational assistance received by the employee prorated by the percent of days worked after successfully completing the course prior to leaving employment with the Board.

12. An employee described in Subsection (11) shall repay any educational assistance received within one year of leaving employment with the Board.
13. Educational assistance for employees is subject to budget availability and appropriate approvals.
14. The Board's Superintendency shall determine the taxable or nontaxable status of educational assistance reimbursements awarded to an employee.
15. In addition to the requirements of this Board Policy – 3004, the authorizing member of the Superintendency shall ensure that the reimbursement complies with:
 - a. DHRM rule R477-10-4; and
 - b. Other applicable state law.