

Education/Tuition/Training Policies

Scholarship Program

From AldenStaff

Contents

- 1 Statement of Purpose:
 - 1.1 Definitions
- 2 Overview
- 3 Procedure
 - 3.1 MLIS scholarship
 - 3.2 Ohio University course scholarship

Statement of Purpose:

The Libraries' has instituted a Scholarship Program, to assist Ohio University Libraries' staff members pursuing Master's degrees in Library and/or Information Science; or classes at Ohio University that are related to one's assignment. Support provided by this scholarship does not commit the Libraries beyond the scope of the scholarship program: to provide educational support to the Libraries' employees.

Definitions

- Qualified Staff: Any employee of the Ohio University Libraries (Athens Campus) employed at least ½ time, and who (if a classified employee) has completed the initial probationary period.
- Related courses: Courses taken at Ohio University which are a requirement of the employee's position, or which serve to maintain and/or improve the skills required to perform job assignments.

Overview

- The Libraries provide financial assistance to qualified staff who are pursuing a Master's Degrees in Library and/or Information Science; as well as assistance with General Fees for related courses taken at Ohio University.
- Position responsibilities take precedence over coursework; class schedules shall be approved by the department head and time spent in class may be required to be made up. With supervisor approval, an employee may take only one course per quarter/semester during regular work hours. (See Ohio University Policy 40.015 (<http://www.ohio.edu/policy/40-015.html>))
- A Scholarship Committee will be constituted to review applications and to make recommendations of financial support to the Dean of Libraries. The Committee will be chaired by the HR Librarian, and will include the Budget Unit Manager, a representative from Library Council, and other members as appointed by the Dean.
- Successful completion of courses is required for continued participation in the scholarship program.

Procedure

- Individuals wishing to participate in the scholarship program are to submit an application for support prior to the start of the academic quarter or semester. Awarding of financial support is granted on a course-by-course basis, not for entire degree programs.

Applications will be accepted throughout the year, as the applicants receive the supporting documentation from their schools. Applicants are encouraged to apply as soon as the information becomes available to facilitate review by the Scholarship committee.

Submit Application materials to D. Daniels, co-chair of Scholarship Comm.

Ohio University / Hocking College

1. OU Educational Benefits Request form (Excel)
(http://www.ohio.edu/hr/forms/upload/Ed_Ben_Employee.xls)
2. OU Educational Benefits Request form (PDF)
(http://www.ohio.edu/hr/forms/upload/Ed_Ben_Employee.pdf)
*with supervisor signature.

Library Scholarship

1. Scholarship Application form (Excel)
2. Narrative statement explaining reason for taking class.
3. Copy of invoice*
4. Letter of acceptance to a Library and/or Information Science Program*
(*as applicable)

- Recommendation for approval of the application is made by the Scholarship Committee. After receiving and reviewing the applications, the Committee will report in writing to the Dean the names of the eligible employees and the recommended level of financial assistance proposed for each. Final determination of support rests with the Dean.

MLIS scholarship

For those cases where financial assistance is awarded, each applicant requesting support for a Library Science program may receive a maximum of 50% of expenses, 25% at the beginning of the quarter/semester, and 25% at the successful completion of the class. The actual amounts awarded will be based on the number of approved applicants, the number of credit hours being taken by each and the financial resources available.

*Upon completion of class, forward a copy of grade report to Budget Unit Manager with request for balance of scholarship.

Ohio University course scholarship

Financial assistance for staff taking classes at Ohio University may cover up to 100% of general fees for full-time employees, or be pro-rated accordingly for qualified part-time employees, based on available resources and the degree to which the class is required.

Retrieved from "https://staff.library.ohiou.edu/wiki/index.php/Scholarship_Program"

Category: Policies

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POLICY NO: 406
EFFECTIVE DATE: 11/01/2008

TUITION ASSISTANCE FOR FACULTY AND STAFF

The University offers full-time faculty, regular full-time staff and limited service staff the opportunity to pursue knowledge and to advance their personal and professional development by providing tuition assistance for credit courses at the University of Pennsylvania.

The faculty/staff member is responsible for managing his/her tuition benefit in accordance with the policies and procedures below.

[Click here](#) to begin using the online tuition management system. With this easy-to-use online system you can apply for tuition benefits, as well as track the status and view the history of requested tuition benefits.

- [406.1 ELIGIBILITY](#)
- [406.2 HIRE/TERMINATION DATES](#)
- [406.3 JOB RESPONSIBILITY](#)
- [406.4 TUITION AMOUNT](#)
- [406.5 APPLYING FOR BENEFITS](#)
- [406.6 TAX LIABILITY](#)
- [406.7 PROGRAM PARTICIPATION](#)
- [406.8 HEALTH INSURANCE](#)

406.1 ELIGIBILITY

All full-time faculty in a benefits-eligible title, regular full-time staff and limited service staff are eligible for tuition assistance benefits in any school of the University of Pennsylvania to which they have been admitted.

All staff members affected by position discontinuation and eligible for benefits in accordance with Policy 628, who were participating in the tuition assistance for faculty and staff benefit at the time of notice of position discontinuation, will receive tuition benefits through the end of the semester in which notice of separation was given.

Retired University faculty and staff who meet University eligibility requirements and retirement criteria, as verified by a retirement specialist within the Division of Human Resources Benefits Office, are eligible for the same faculty and staff tuition benefits for which they were eligible immediately prior to retirement.

A visiting member of the instructional staff is eligible for tuition assistance only if specified in the minutes of the Provost's Staff Conference.

In the case of faculty/staff eligible for the tuition benefit, the following special situations may affect a faculty or staff member's continued eligibility:

- **Leave of Absence without Pay:** Faculty and staff on a leave of absence without pay are not eligible to receive tuition benefits during the leave.
- **Workers' Compensation:** Faculty and staff on workers' compensation will continue to be eligible for the tuition benefit for one year from the date workers' compensation began.
- **Long-Term Disability (LTD):** Faculty and staff on long-term disability are eligible to receive the tuition benefit for as long as the faculty/staff member continues to qualify for long-term disability per the University of

Pennsylvania's LTD policy.

- Faculty/staff who are active, but not being paid, may be considered ineligible.
- Family and Medical Leave (FML) or Short-Term Disability (STD): Faculty and staff on approved family medical leave or short-term disability are eligible to receive the tuition benefits they are normally eligible for as follows:
 - If a faculty/staff member is on approved family medical leave (FML) or short-term disability (STD) and the end date of his/her leave is before the eligibility cutoff date for the semester, the faculty/staff member must return to work on his/her approved FML or STD end date and work past the eligibility cut-off date for the term, or continue to be out on official FML or STD. If the faculty/staff member is put on an unpaid leave of absence after family medical leave or short-term disability has been exhausted, but before the eligibility cut-off date for the term, s/he will not be eligible for tuition benefits.
 - If a faculty/staff member is on approved family medical leave or short-term disability and the end date of his/her leave is after the eligibility cut off date for the term, the faculty/staff member is eligible for the tuition benefit.

The benefits and policies for University of Pennsylvania faculty/staff who work in locations outside of Penn's main campus may be different from the benefits and policies set forth in this policy. Faculty/staff working outside of Penn's main campus should contact their Human Resources representatives for more information.

Tuition assistance benefits are administered by the Tuition Office in the Division of Human Resources. The Tuition Office makes final administrative determinations if any questions arise concerning an individual's employment relationship with the University and eligibility for tuition assistance under the program.

406.2 HIRE/TERMINATION DATES

Eligible faculty/staff hired on or before the cut-off date of a semester may obtain tuition benefits for the semester in which they were hired. Eligible faculty/staff hired after the cut-off date of the semester cannot receive tuition benefits until the start of the following term. Faculty/staff who terminate or become otherwise ineligible on or before the cut-off date of the semester lose their benefit. Faculty/staff who terminate after the cut-off date of the semester will receive the benefit through that semester.

The cut-off dates are:

Spring semester:	March 1
Summer Session I and 12-week Summer Session:	June 1
Summer Session II:	July 15
Fall semester:	October 15

406.3 JOB RESPONSIBILITY

Faculty and staff who elect to take courses and receive tuition benefits under this program must continue to meet the full responsibilities of their University positions. Faculty/staff may attend classes during their normal working hours provided they have received prior approval from their immediate supervisor and have arranged to make up the work and any time away from regular hours of business. A supervisor may deny a faculty/staff member's request to attend classes during normal working hours if the supervisor determines the faculty/staff member's presence during those hours is essential to the job or the needs of the department.

406.4 TUITION AMOUNT

Eligible faculty and staff may receive tuition assistance for six (6) course units of the tuition, general fee and technology fee over the academic year for credit courses and Math 101. Tuition assistance will be provided for a maximum of two (2) course units along with the above fees in both the Fall and Spring semesters. Tuition assistance

along with the above fees for up to a maximum of two (2) course units will be provided during the University's two summer sessions. Course units cannot be accrued. Some courses are more than one course unit. No fees are covered other than those stated above.

The benefit will not cover financial penalties associated with dropped courses. Financial penalties incurred for courses dropped after a faculty/staff member's educational program's official "course selection" period (usually ending approximately two weeks into a semester) are not covered by the tuition benefit. Faculty/staff should take note of their program's deadline to drop a course with no financial obligation or consult with the educational program about their course selection period before enrolling in courses. Any benefit payments made for courses that are dropped will be retracted near the end of the term, leaving a balance on the student account.

If a faculty/staff member receives a refund of a full or partial tuition benefit payment, s/he must return the payment to Student Financial Services and notify the tuition benefit office immediately or else will be held liable. Under no circumstances can the Penn tuition benefit be refunded to a faculty/staff member. Failure to refund the University of Pennsylvania is in violation of the University's tuition benefit policy and will result in the University taking appropriate actions to recapture the funds.

If a faculty/staff member enrolls in an executive or full-time program that does not calculate tuition on a per-course-unit basis, the faculty/staff member will still receive the coverage as outlined above. The tuition benefit office will calculate the benefit by using the per-course-unit tuition rate from the most closely related program that calculates tuition on a per-course unit basis. The program/rate used is determined at the sole discretion of the Tuition Benefit Office.

406.5 APPLYING FOR BENEFITS

To apply for tuition benefits, use the online tuition system at www.hr.upenn.edu/tuition. You should apply as soon as you have been accepted into a school's program or as soon as you have registered for courses. Application for benefits must be completed for every semester in which you wish to request the benefit.

You must use the online system to apply no later than the following dates:

Spring semester:	March 15
Summer Session I and 12-week Summer Session:	June 15
Summer Session II:	August 15
Fall semester:	November 15

Tuition benefits are contingent upon timely application using the online system. Failure to file for benefits in a timely manner may result in the application of late charges to the your bill, for which you are responsible. Benefits will not be approved for requests that are submitted after the deadline dates listed above for a specified term.

Faculty/staff are responsible for monitoring their student bills for balances and assume full responsibility for the entire bill until the benefit payment has been applied. Resulting balances due to fees not covered by the benefit such as late fees, program fees, lab fees or balances due to withholding are the responsibility of the faculty/staff member.

406.6 TAX LIABILITY

Faculty/staff are fully responsible for any tax liability incurred as a result of these benefits being treated as taxable income to the faculty/staff at any time. The University may report the benefit amount as income to any taxing authority and withhold taxes from such benefit amounts or from the faculty/staff member's other salary income. Under current law, graduate tuition benefits for faculty and staff are subject to federal income tax, FICA (Social Security tax), Medicare tax and city wage tax to the extent that the benefits exceed \$5,250 per calendar year. This "tax-free" exemption currently applies through calendar year 2010.

Any applicable taxes are withheld directly from the benefit and the net amount is awarded to the student as the benefit. The student will then be left with a balance on his/her student account that must be paid within the deadlines set by the University's Student Financial Services Office. The gross tuition amount subject to taxes and the taxes withheld are

reported to the IRS as a part of the faculty or staff member's earnings. The taxpayer is responsible for making appropriate W-4 adjustments, if desired. The taxpayer is also responsible for settling his/her tax liability on year-end tax filing.

406.7 PROGRAM PARTICIPATION

In order to take courses at the University of Pennsylvania, faculty/staff must apply, as would any outside candidate, and be accepted into the Penn program of interest. Eligibility for the tuition benefit does not confer acceptance into a Penn program.

Faculty/staff accepted into a program at Penn are considered students of Penn and are thus bound by all program and University rules and regulations. Faculty/staff may be limited in their access to certain programs by educational program regulations such as those requiring full-time status or program/course pre-requisites or restrictions. Educational program regulations are outside the scope or management of the Tuition Benefit Office and should be thoroughly researched by the faculty/staff member before embarking on any course of study.

406.8 HEALTH INSURANCE

The University requires full-time students to maintain medical insurance with coverage for inpatient care and catastrophic illness and injury. Student Health Services will automatically enroll and bill full-time students for the Penn Student Insurance Plan if they do not submit a waiver each school year showing that they have other health insurance. This includes faculty and staff members working at Penn. If you have health coverage through Penn's benefits program or through another source (e.g., spouse's benefits program), you must submit a waiver to Student Health Services each school year. Please refer to the Student Health Services website for more information (www.vpul.upenn.edu/shs/).

Applicability: Full-time Faculty, Regular Full-time and Limited Service Staff

Cross-reference: [Policy 407](#), [Policy 408](#), [Policy 409](#), [Policy 628](#)

Supersedes Policy Number(s): 406 (08/15/95, 07/01/97, 07/01/2004, 05/26/2005, 11/02/2005, 04/09/2007)

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Policy HR36 EDUCATIONAL PRIVILEGES FOR FACULTY, STAFF, AND RETIREES

POLICY'S INITIAL DATE: August 1, 1955

THIS VERSION EFFECTIVE: July 17, 2008

Contents:

- [Purpose](#)
- [Employee Eligibility](#)
- [Service Requirement](#)
- [Where Courses are Offered](#)
- [Limitations](#)
- [Required Approval](#)
- [Credit Limits - 12-Month Employees](#)
- [Credit Limits - Two-Semester Employees](#)
- [Graduate Degree Limitation](#)
- [County Agents, Home Economics Extension Personnel, Certain Continuing Education Personnel](#)
- [Amount of Fee Reduction](#)
- [Other Limitations](#)
- [Cross References](#)

PURPOSE:

To provide faculty, staff, and retirees the opportunity to advance their education by taking University courses at reduced fees.

EMPLOYEE ELIGIBILITY:

The following categories are eligible for educational privileges:

- a. A regular employee during active periods of employment and certain inactive periods of employment. See [HR16](#), [HR19](#), [HR34](#), [HR88](#), and [HRG11](#) for eligibility of regular employees during inactive periods of employment.
- b. A faculty or exempt staff member appointed on a full-time Fixed-Term II, or full-time, faculty Visiting Appointment for at least one semester or summer session, during any time covered by that appointment which encompasses both the beginning and end of a semester or summer session.
- c. A member of the armed services who is on the staff of the Department of
 1. Military Science

2. Air Force Aerospace Studies

3. Naval Science

d. A retired employee, provided the retiree meets the requirements for the continuation of benefits after retirement.

SERVICE REQUIREMENT:

Educational privileges are available for any semester or summer session in which classes begin on or after the faculty or staff member's date of full-time, regular employment.

Employees are not eligible for educational privileges for any semester or summer session in which classes begin after the employee's final day of fulltime, regular employment status. Also, the faculty or staff member must remain in regular employment status for at least one-half of the semester or summer session in order to maintain eligibility for the educational privileges. These limits do not apply to an eligible retiree as indicated in "d" in the section above.

WHERE COURSES ARE OFFERED:

Eligibility for University educational privileges for an employee applies at all University locations.

LIMITATIONS:

The educational privileges apply to all resident instruction and continuing education credit courses except the professional curriculum such as those offered at the College of Medicine at The Milton S. Hershey Medical Center, the Smeal College of Business Administration Executive MBA Program, and the Dickinson School of Law. Educational privileges do not apply at summer camps or workshops operated by the University unless University credit is given and regular tuition is charged.

REQUIRED APPROVAL:

Permission for a regular employee to schedule courses is a special arrangement and privilege, and should not be considered as a right. It is granted only when the supervisor believes that the scheduling of courses will not interfere with the efficient operation of the employee's regular University duties.

CREDIT LIMITS - 12 - MONTH EMPLOYEES:

Scheduling of classes by a regular employee on a twelve-month-service basis (including an academic employee), either for credit or to audit, is limited to sixteen (16) credits per academic year beginning with the summer session.

An employee (other than academic) can schedule up to a full schedule of credits during a semester or summer session that the employee is not working, provided that he or she is on vacation or layoff during the entire period of that academic session.

CREDIT LIMITS - TWO-SEMESTER EMPLOYEE

Scheduling of classes by a regular employee on a two-semester-service basis (including an academic employee), either for credit or to audit, is limited to twelve (12) credits during the two semesters in which the employee has worked within the academic year.

A two-semester-service basis employee can schedule up to a full schedule of credits during the summer session the employee is not working, provided he or she continues to receive payments on the salary payroll.

GRADUATE DEGREE LIMITATION:

No academic employee above the rank of Instructor, Research Assistant, or equivalent may receive from the University the Master's Degree or the Doctor's Degree in any graduate program where the faculty member has membership, teaches courses, serves on Master's or Doctoral Committees, or has other supervisory responsibilities which might give rise to conflicts of interest. The faculty member should inform his/her department head of his/her intention to pursue an advanced degree.

**COUNTY AGENTS, HOME ECONOMICS EXTENSION PERSONNEL,
CERTAIN CONTINUING EDUCATION PERSONNEL:**

A County Agricultural Agent or Home Economics Extension Representative (including those at the Assistant and Associate ranks), and certain Continuing Education personnel with the job titles of Assistant Director for Continuing Education, Area Director, or Area Representative, including Coordinators and Specialists in various subject matters or program areas, can schedule up to a full schedule of credits during a semester or summer session that the employee is not working, provided that he or she is on vacation, layoff, or leave of absence during the entire period of that academic session.

AMOUNT OF FEE REDUCTION:

The educational privileges include a reduction of 75% of the tuition payable per credit.

OTHER LIMITATIONS:

The educational privilege is a generous benefit provided to employees and additional Penn State funds should not be used to supplement the educational privilege benefit. Therefore, those receiving educational privileges are not eligible for University scholarships and also may not receive funding from other University sources (general, restricted or unrestricted miscellaneous funds), with the exception of endowed funds specifically established for the benefit of employees.

Note that [HR38 - University Courses for Training Faculty and Staff](#) covers situations where the department wants an employee to take a course as professional development. General funds may be used in these situations, but the department must pay 100% of the cost and the educational privilege (employee grant-in-aid) does not apply. Departments are not permitted to ask employees to enroll using the educational privilege, and then to reimburse the employee for the 25% of tuition not covered.

If additional support is provided through an endowed fund specifically established for the benefit of employees, the award to the employee must be posted in the ISIS system for all credit courses - no direct reimbursement to the employee is permitted. In addition, the application of these funds may only be used to cover remaining tuition - no refunds to employees may result from the application of these funds. All awards to employees must meet the eligibility requirement of the endowment and those

receiving the funding must be approved by the budget executive for the unit as well as for the budget executive for the employee's home budget, if not the same as the budget executive for the endowment.

CROSS REFERENCES:

[HR16](#) - Leave of Absence without Salary (Other than for Extended Active Military Service)

[HR18](#) - Graduate Study Leave of Absence

[HR19](#) - Leave of Absence for Active Military Service or Training

[HR34](#) - Employment Conditions for Staff Employees

[HR37](#) - Grant-in-Aid for Dependents of Faculty, Staff and Retirees

[HR54](#) - Continuation of Group Insurance After Age 60, Age 65, and After Retirement or Death

[HR88](#) - Alternatives to Regular Twelve Month Staff Employment

[HRG11](#) - Family and Medical Leave

[HRG13](#) - Definition of Formal Study as Outlined in HR16

REVISIONS:

July 17, 2008

OTHER LIMITATIONS section added.

August 1, 2007

Clarification added to Limitations paragraph.

July 1, 2002

Limitations section - revised to include the Smeal College of Business Administration Executive MBA Program

[top of this policy](#)

[GURU home](#)

[GURU policy menu](#)

[GURU Tech Support](#)

[GURU policy search](#)

[Penn State website](#)



Policy UL-HR04 Release Time to Attend Academic Courses

HUMAN RESOURCES

Policy UL-HR04 RELEASE TIME TO ATTEND ACADEMIC COURSES

Contents:

- Purpose
- General Statement
- Course Eligibility
- Employee Eligibility
- Guideline
- Types of Work Schedule Accommodations
- Handling Time Spent Attending Course-Related Activities
- Approval Procedure
- Revocation of Release Time Privileges
- Cross References

PURPOSE:

These guidelines provide a framework for employees and supervisors to use in making consistent and equitable decisions regarding release time to attend a Penn State academic course.

GENERAL STATEMENT:

The University Libraries recognizes the importance of its employees and their contributions to the accomplishment of its mission. The Libraries' administration supports and encourages the continuing education of all its employees. It is understood that is not always possible for employees to select a course that is scheduled outside of their normal working hours. Therefore, supervisors are encouraged to grant release time or make work schedule accommodations, as work needs allow. The granting of release time or any other work schedule accommodation for an employee to attend a Penn State academic course is a special arrangement and privilege, and should not be considered as a right.

COURSE ELIGIBILITY:

Employees may request release time to attend any Penn State academic course.

Employees may also request release time to attend a graduate study course at another institution if that course meets one of the criteria listed below:

1. For employees at University Park and locations away from University Park:
 - a. The graduate study course is not offered by Penn State either traditionally or online and the other institution is located within a reasonable commuting distance of the work location.
2. For employees at locations away from University Park only:
 - a. The graduate study course is offered at Penn State, but is not offered at the employee's work location, any other Penn State campus within a reasonable commuting distance, and/or online.

Employees may not request release time to attend an undergraduate course at another institution.

EMPLOYEE ELIGIBILITY:

An employee must meet one of the categories below and have completed at least six months of employment in the University Libraries.

1. A regular, full-time faculty or staff member appointed on a standing or fixed-term I appointment.
2. A faculty member appointed on a full-time fixed-term II appointment.

GUIDELINE:

Libraries' employees may be granted paid release time to attend a Penn State academic course which is scheduled to meet during their normal working hours. Release time includes travel and class time and will not exceed a maximum of three and one-half hours per week for full-time staff; for staff on less than 100% full-time equivalency (FTE)

appointments, release time will be calculated on a pro-rated basis, based on their % FTE during the semester they are requesting to attend the course. Release time is not considered "time worked" in the computation of overtime.

Service needs of the department must take first priority. The immediate supervisor is responsible for ensuring that granting of an employee's request will not interfere with the service needs of the department nor the employee's job requirements. (See [Guidelines for Approving Work Schedule Accommodation Requests](#))

Employees who have received supervisory approval to either take more than one class or one that exceeds three hours per week, in any one semester, during normal working hours must either make-up the time missed, use vacation, or take a personal leave of absence without pay.

In cases where the granting of release time is not feasible due to service needs of the department, employees may request and supervisors may approve a work schedule accommodation.

TYPES OF WORK SCHEDULE ACCOMMODATIONS:

The following accommodations are possible and are at the discretion of the immediate supervisor:

Flexible Work Schedule:

There are two options that apply:

1. An employee may request to temporarily change their scheduled work hours during the semester in which they are attending a course, keeping in mind that they must still work the required number of work hours each work week (typically 40 hours for 100% FTE). (See also, Guideline HRG02, Alternate Work Arrangements)
2. A supervisor may grant release time during normal working hours but require the employee to make up the hours missed on an hour-for-hour basis within the same workweek, as scheduled by the supervisor. For nonexempt employees, hours made up in addition to a 40-hour workweek are subject to overtime compensation.

Personal Leave of Absence without Pay or Use of Vacation Time:

In some cases the needs of the department and/or employee are better served by allowing the employee to take a personal leave of absence without pay (see [Policy HR16, Leave of Absence without Salary](#)) or to use vacation time to cover their absences.

HANDLING TIME SPENT ATTENDING COURSE-RELATED ACTIVITIES:

Employees are not permitted to perform or attend course-related activities during normal working hours. Examples of course-related activities include studying, homework, research, field trips, group project meetings, study sessions, etc. Time spent performing or attending course-related activities outside of the weekly scheduled class meeting time should be done on the employee's personal time and may be charged to vacation, personal holiday, or compensatory time or made up at the discretion of the immediate supervisor.

APPROVAL PROCEDURE:

Employees requesting a work schedule accommodation to attend a Penn State academic course must submit their request, by completing the [Request for Release Time to Attend an Academic Course Form](#), prior to registering for the course. Approval must be granted by the employee's immediate supervisor with concurrence from the unit/subject head and department head.

Supervisors may request to see proof of enrollment and completion of courses.

REVOCAION OF RELEASE TIME PRIVILEGES:

Release time privileges may be revoked if the time away from work negatively affects operations in the unit or the employee's performance of their regular duties and responsibilities.

CROSS REFERENCES:

Other Policies in this manual should also be referenced, especially the following:

Guideline [UL-HRG15](#) Approval of Work Schedule Accommodation Requests

Form: [Request for Release Time to Attend an Academic Course](#)

Policy [HR18](#) – Graduate Study Leave of Absence

Policy [HR36](#) – Educational Privileges for Faculty, Staff, and Retirees

Policy HR65 – Graduate Study Grants for Exempt Staff Personnel who are Permanently Away From University Park to Support Study at Other Institutions of Higher Learning

Effective Date: September 19, 2005

Date Approved: September 19, 2005 (Dean's Library Council)

Revision History (and effective dates):

- December 2008 – Revised to include course eligibility requirements.
- September 19, 2005 – New policy (Formal)
- September 2002 – New policy (Interim)

Last Review Date: December 2008

University of Virginia Library *Professional Development Funding Policy*

In order to meet the challenges of today's academic research library environment and to better support the mission and goals of the Library, the University of Virginia Library encourages all employees to participate in professional development/education activities. Through its program of professional development/education, employees are equipped with the skills necessary to keep pace with changing user needs, master new technologies, and adapt to a workplace characterized by innovation and change. Professional development also provides networking opportunities for staff to contribute knowledge to the profession and keep abreast of developments in library or related fields.

General Policy

Based on the availability of funds, each employee has available a standard allocation per fiscal year for professional development/education activities. No formal written request is required to receive this standard allocation; however, all professional development/learning plans should be discussed with the employee's immediate supervisor and outlined in either the employee work profile or in the professional goals for the current year.

- ◆ Currently the standard allocation per Fiscal Year will be **\$800** for each faculty member and **\$500** for each non-faculty (classified & university staff) members, to be used to support professional development activities. Activities can include fees/ tuition/ travel expenses (**please note that there is a new \$2000 UVA funded Education Benefit for tuition and some non-credit courses/workshops/seminars – please check section outlined later in this document**). *An additional stipend of up to \$200.00 is available to support significant involvement, such as chairing a committee for a national organization or presenting a paper at a conference outside the University of Virginia. The maximum allocation under this policy will be \$1,000.00 for faculty and \$700.00 for non-faculty staff per fiscal year. These professional development activities should be documented in the reimbursement packet (credit card bills, invoices, and receipts, etc.) submitted to Financial Services.*
- ◆ Requests for funds *above the standard allocation* may be made at any time throughout the fiscal year. Employees should submit a statement to their supervisors that includes the following information: name, number of years worked at the Library, name of the development activity, conference, etc. and a brief statement as to how attendance will enhance individual development and/or contribute to departmental goals and objectives and/or contribute to the Library's mission, goals and objectives. Department heads have the discretion to fund the request with departmental funds or may seek additional funding to support the request from their AUL. Special consideration will be provided to newly hired library employees for whom additional funding will enable first-time involvement in professional development activities and for others with professional development goals that align closely with personal, departmental, or library goals and objectives. Approvals to receive additional funding for professional development above the standard allocation must be in writing. If travel is *involved, funding above the standard* allocation should be requested from your supervisor in advance. Additional approval of costs is based on the availability of funds.
- ◆ The *Pre-approval of Proposed Trip Estimate* form ("estimated expenditures") should be used to request the additional travel funding. If the total costs are within the standard allocation, pre-approval is not needed. For reimbursement after the trip, the *signed Pre-approval of Proposed Trip Estimate* form must be submitted to Financial Services with the Travel Reimbursement Request. Only preapproved costs above the allocation can be reimbursed.
- ◆ All newly hired library faculty members will be awarded double (\$1600) the standard allocation for their first two years of employment to support their involvement in professional development activities as new members of the UVA Library community

UVA Education Benefits (\$2000)

A full explanation of these benefits and how to enroll can be found at: <http://www.hrs.virginia.edu/benefits/educhen/edbenefitsprogram>. Further guidance can be provided by the Library Training Manager or by contacting UHR. The following is an overview from the UHR site:

Revised 11-12-08

“Tuition Benefits Program Overview A core component of the Education Benefits Program is tuition benefits, designed to provide Employees and their Schools and Departments with centrally-provided financial support for employee education, vocational and professional development opportunities, in accordance with State policy. Education Benefits may be used for academic degrees or courses at UVA and other accredited institutions, and non-credit courses, certificates and licenses at UVA and other education providers.

Schools and Departments may provide additional, departmentally-funded financial support for employee education, vocational and professional development, in accordance with State policy, by providing a PTAO that will be charged for the amount approved by the department.

While the Education Benefits program does provide funding for part-time employees the primary purpose of the program is to support full-time employees who are part-time students. The program is not intended to support the coursework of full-time students.”

If you have any questions about this policy contact UHR Benefits at 924-6954.

Library Tuition Benefits

**(This section is still under review in light of the University \$2000 Education Benefit):*

The Library will fund tuition reimbursements for a maximum of three classes per employee per year, or a maximum of \$3,000.00 per year per Library employee enrolled in a degree program depending on availability of funds. This is funding above the \$2000 Education Benefit provided by UHR. Employees should discuss enrollment in a degree program with their supervisors and need to request approval for the additional funding from their supervisor in order to ensure reimbursement. Once approved, the enrollment form for the UVA Education Benefit must be completed.

Revised 11-12-08

Funding/Release Time Policies and Procedures, Organization Development and Training

Policies and procedures for funding and release time for staff development activities.

University of Washington Libraries

Libraries Organization Development and Training

POLICIES AND PROCEDURES FOR FUNDING/RELEASE TIME

Funding and release time is available to the staff of the University of Washington Libraries through the Libraries Organization Development and Training (ODT) office. The funding is meant to encourage staff to develop their skills and capabilities and to help to create an environment in the Libraries where staff can thrive.

What types of training and development are covered by Organization Development and Training?

The following types of training and development are covered by ODT and release time and/or funding is generally available:

1. Libraries-sponsored training and development programs
2. University-sponsored staff training and development programs (non-credit) as offered by Professional and Organizational Development (POD); UW Technologies; Environmental Health and Safety; Police Crime Prevention Unit; and other such units.
3. E-Learning at a workstation and/or programs delivered through teleconferences, webcasts, or other electronic methods at a central location
4. Continuing education offered in the region by training and development companies, professional associations and other off-campus agencies.
5. Programs delivered through teleconferences, webcasts, podcasts or other electronic delivery

What is the difference between staff travel money and staff development funding?

Staff travel provides funds for librarians and professional staff to travel (transportation, food, lodging, registration fees) to professional and scholarly meetings and conferences. Staff travel will also support travel by classified staff members when travel is related to their position responsibilities in the Libraries.

ODT funding does not include travel (that is, transportation, food, and lodging). In some cases, a professional association will hold professional or scholarly meetings and conferences in the region and a number of staff would like to attend. In these cases, ODT funding may be used to cover registration costs only. Whatever the circumstances, the Dean of University Libraries, in consultation with the ODT, will strive to use various funding resources to best advantage.

Questions about whether to request travel money or Organization Development and Training funds should be directed to the Libraries Staff Development and Training Coordinator or the Director of Organization Development and Training.

Is there a funding limit for staff development funding?

Each request for funding is considered on a case-by-case basis with available funds kept in mind. The philosophy is to fund as many requests as possible within budget limits.

Who is eligible for funding and/or release time?

All fulltime, part-time and temporary employees of the Libraries are eligible for funding and/or release time.

Student hourly employees are not eligible for funding for University-sponsored or off-campus training. They will be paid at their regular hourly rate when attending Libraries-sponsored training.

There are three levels of requests:

Level 1: Release time only; not directly related to assigned responsibilities; or, long-range development and personal growth, or training is free.

Level 2: Release time and 50% funding; important to the performance of, or improvement of performance of assigned responsibilities; or, personal growth broadly related to responsibilities or career advancement.

Level 3: Release time and 100% funding; necessary for the performance of or enhancement of assigned responsibilities.

Where do I find the application for funding and release time for development?

Libraries Application for Funding can be found on the Organization Development and Training webpage at:

<http://staffweb.lib.washington.edu/staffdev/>. Questions should be directed to the Libraries Staff Development and Training Coordinator or the Director of ODT at staffdev@lib.washington.edu.

Where do I find the procedures, policies and application for travel funding?

The Libraries Travel Application and other materials can be found at:

<http://staffweb.lib.washington.edu/SWindexes/PolProc/LibTravel.html>.

How much release time can a staff member have to attend training events?

For University-sponsored training and development, the University Release Time Policy applies. Employees will be provided release time to participate in training or development up to a maximum of 24 hours per quarter plus travel to and from class. Part-time employees will have release time prorated (e.g., an employee working a 50% schedule, is eligible for 12 hours of release time per quarter).

Management directed (for example, required training) training is not included in this limitation on release time. For example, the UW Strategic Leadership Program or a computer course from UW Technologies that is required by the UW or the supervisor does not count in the 24 hours per quarter.

Release time for Libraries-sponsored programs does not count in the 24 hours per quarter.

If a staff member attends a training off-campus, it does not count in the quarterly allotment.

Employees should be granted release time whenever possible. It is the supervisor's responsibility to assure that the absence will not create an adverse impact on the operations of the unit.

What if a staff member needs only release time?

An employee wishing to attend a Libraries-sponsored or a free University-sponsored activity need only secure the supervisor's **verbal** approval for release time. Written release time approval is needed (for institutional liability purposes) for any off-campus activity even when the activity is at no cost or the employee is paying.

How does a staff member know when staff development funding has been approved?

Staff members should fill out the Organization Development and Training Application for Funding and give it to their supervisor. The supervisor will sign it and forward it to the next appropriate supervisory level. The application is then forwarded on to the appropriate Associate/Senior Associate Dean for approval. The Dean of University Libraries must approve any single requests of \$300 or more. Administrators will forward the application to ODT. When funding is approved by ODT, the staff member will be notified.

Staff members should contact the ODT office if approval is not forthcoming within 3 or 4 days.

What if the immediate supervisor denies a request for funding and/or release time?

A staff member's immediate supervisor may not deny a request for funding or time without consulting with the next level supervisor. The decision to deny time and/or funding should be fully explained to the staff member making the request.

How does a staff member pay for training?

Staff members should **not** register for training until their application for funding is approved. There are 3 ways to pay for training. When a request for funding has been approved, Libraries Staff Development and Libraries Accounting will work with the staff member to choose the most efficient method of payment.

Payment methods include:

1. Pay with budget number. For UW events, ODT will supply a budget number when the application is approved. This enables a staff member to register online for on campus classes. It is preferable to pay with a budget number on campus - some classes cost more if paid by check or credit card.
2. Pay with check or credit card and receive reimbursement. This is often the method of payment for off campus events. Save all receipts; contact Libraries Financial Services for reimbursement procedure.
3. Pay with a purchase order (PO) number. This is sometimes a payment method for off campus events. After the funding is approved, the staff member should contact Libraries Financial Services to obtain a PO number in order to register.

WASHINGTON UNIVERSITY LIBRARIES
TUITION REIMBURSEMENT PROGRAM

The successful operation of an academic research library requires a staff that is competent in all service and support areas. The staff must have up-to-date skills and knowledge that cover a broad range of library and educational activities.

COURSES AT WASHINGTON UNIVERSITY

Washington University has greatly enhanced its tuition benefit and now provides 100% remission for Washington University undergraduate courses and 50% remission for Washington University graduate courses. These courses may be taken in either the evening or day program as long as there is **no conflict with the normal work schedule**. All full-time library staff members are eligible for this benefit. Employees should register for the courses with the appropriate department and then submit, to the Benefits Office, the tuition assistance form available on the Human Resources website.

GRADUATE COURSES IN LIBRARY SCIENCE AT OTHER UNIVERSITIES

In compliance with the tax laws, current University policy permits the Library to pay for courses only if they are job related. In keeping with this, the Library will continue to assist staff members in their pursuit of the Master's Degree in Library Science.

ELIGIBILITY and CRITERIA

All full-time library staff members who have completed their orientation period and are enrolled in a graduate program in library science are eligible to participate in the program assuming satisfactory job performance is maintained. To participate, employees should complete and submit the *Application for Course Approval/Tuition Reimbursement* form prior to registering for the course.

RESTRICTIONS

The designated amount of reimbursement will be given for only one (1) three credit hour course during a semester or summer session. Prior approval of the Unit Supervisor, Head and/or Associate Dean, and the Associate Dean for Administration is required. Courses toward the completion of a doctorate degree are ineligible under this program.

REIMBURSEMENT

For graduate courses in Library Science, the Library will reimburse up to \$400. *Please note that tuition reimbursement for all graduate courses is taxable and is included in the employee's income for federal income tax purposes, under current IRS regulations, unless the course is REQUIRED for the employee's current job or satisfies certain express employer-imposed conditions for continued employment.* Reimbursement requests will be processed only after the course has successfully been completed with a grade of C or better and verification of the grade has been submitted to the office of the Associate Dean, Administration. A copy of the paid tuition receipt must be submitted along with the grade statement.

This statement is effective immediately and supersedes all other documents on this subject.

10/25/99
Revised 6/12/02

Home	News	Constitution	Contract	Membership	Reports
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2006-09 Contract: Article 28

Article XXVIII Tuition Assistance Program

A. Definition

A tuition assistance program for members of the academic staff shall provide tuition vouchers for students for up to two courses or six hours whichever is greater for each of two terms each fall, winter, spring/summer year and one course or four hours whichever is greater for one term each fall, winter, spring/summer year. This program applies to tuition only; incidental fees that may be charged are borne by the Academic-Staff member. Reimbursement for graduate tuition is subject to applicable federal tax. Participation under this program must be consistent with the University graduate and undergraduate academic policies.

B. Admissions

Admission to a degree program in the University, academic advising, registration, payment of fees, etc., shall be administered by the schools/colleges and service offices responsible for these functions.

Quickl

Contract

Content

[Preamble](#)

[Article 1](#)

[Article 2](#)

[Article 3](#)

[Article 4](#)

[Article 5](#)

[Article 6](#)

[Article 7](#)

[Article 8](#)

[Article 9](#)

[Article 10](#)

[Article 11](#)

[Article 12](#)

[Article 13](#)

[Article 14](#)

[Article 15](#)

[Article 16](#)

[Article 17](#)

[Article 18](#)

[Article 19](#)

[Article 20](#)

[Article 21](#)

[Article 22](#)

[Article 23](#)

[Article 24](#)

[Article 25](#)

[Article 26](#)

[Article 27](#)

[Article 28](#)

[Article 29](#)

[Article 30](#)

C. Enrollment

Academic-Staff members may enroll for credit courses in any school or college at Wayne State University for which they are eligible.

Article 28

Article 28

Article 28

Article 28

Article 31

D. Eligibility

To be eligible for tuition assistance:

1. The Academic-Staff member must have been appointed prior to the last day of final registration for the term for which s/he plans to register.
2. College admission requirements must be met.
3. Total credit hours taken in a given term shall not exceed eight hours. Exceptions to this regulation shall be made only upon prior written approval of the chair and dean/vice-president of the unit where the Academic-Staff member is employed.
4. Academic-Staff members shall submit to Benefits Administration a signed Tuition Assistance Application (Form I0-780) at least five working days prior to registering. Failure to submit an application before the end of the term will forfeit eligibility under the program for that term.

Article 31

Article 31

Article 31

Article 31

Article 31

Article 31

Article 31

E. Forfeit of Benefit

The Academic-Staff member will forfeit the tuition assistance benefit and must make prompt reimbursement of the full amount of tuition assistance to the University if:

1. A passing grade or mark is not achieved.
 - a. For the purpose of establishing eligibility for this program undergraduate grades of A, B, C, D and graduate grades of A, B, C shall be considered passing grades. Marks of P or S shall be considered passing.
 - b. Marks of "Deferred" (Y) must be resolved into passing grades within twelve

months following termination of the term in which the course was elected. An extension for an additional twelve months may be granted upon the written approval of the President or his/her designee. One-year extensions for the completion of "Deferral" (Y) marks for thesis or dissertation credit shall be granted by the President or his/her designee upon receipt of a written request from the Academic-Staff member countersigned by the appropriate graduate officer to verify continuance in an academic program.

- c. Marks of "Incomplete" (I) must be resolved into passing grades within twelve months following termination of the term in which the course was elected.
 - d. Marks of I or Y must be resolved into passing grades or marks prior to employment termination date.
 - e. Marks of I or Y must be resolved into passing grades or marks prior to certification of degree.
2. The Academic-Staff member does not remain on the active payroll for the entire term in which s/he makes application for the tuition assistance.

F. Course Work in Relation to Academic-Staff Working Hours

1. One course per semester may be taken during the Academic-Staff member's normal working hours, provided his/her chair/dean/vice-president is able to arrange adequate coverage of the position.
2. Time taken off is charged to vacation or additional hours are worked to make up the time taken off.
3. Prior written approval is sent by the dean/vice-president to the President or his/her designee with a statement of how the time is to be made up and is approved by the President or his/her designee.

G. Collection of Forfeited Tuition Assistance Amounts

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If an Academic-Staff member forfeits eligibility for tuition assistance under the Tuition Assistance Program and does not make prompt reimbursement of the full amount owed to the University, the University may use payroll deductions (of not more than 25% of the gross amount of each biweekly paycheck) or other appropriate means to assure prompt collection of all forfeited tuition assistance amounts.

H. Tuition Reduction for Spouses, Domestic Partners, and Children

1. The spouse or domestic partner of any bargaining-unit member and/or children less than twenty-six years of age who are admitted to the University through its normal procedures shall be permitted to enroll in Wayne State University graduate and undergraduate courses at a cost of fifty percent of the regular graduate or undergraduate tuition rate per credit hour according to their student rank. The spouse, domestic partner, and/or children shall be encouraged to apply for appropriate scholarships and/or fellowships, the funding of which will reduce the amount of University assistance. Incidental fees shall be charged to the spouse, domestic partner, and/or children for such enrollment.
2. Children less than twenty-six years of age, of bargaining-unit members holding tenure or employment security status who died or became disabled while employed at the University, who are admitted to the University through its normal procedures shall be permitted to enroll in Wayne State University graduate and undergraduate courses at a cost of fifty percent of the regular graduate or undergraduate tuition rate per credit hour according to their student rank. The children shall be encouraged to apply for appropriate scholarships and/or fellowships, the funding of which will reduce the amount of University assistance. Incidental fees shall be charged to the children for such enrollment.
3. The tuition reductions described in H.1 and H.2 do not apply to registrations of students in the School of Medicine who are seeking the M.D. degree, students in the College of Pharmacy and Health Sciences who are seeking the Pharm.D. degree, and students in the Law School who are seeking the J.D. degree.
4. The bargaining-unit member, or the eligible survivor of a deceased bargaining-unit member, must apply for tuition reduction by the end of the term for which the reduction is requested by submitting a completed application to Benefits Administration.

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