

CAL POLY POMONA FOUNDATION, INC.

POLICIES AND PROCEDURES

SUBJECT:	Educational Assistance Program	Policy No.	207
		Old No.	1979-2
		Date:	04/02/79
Reference:	129-II-D, 276-II-D, 298-II-D; 333-III-E	Revision:	6/13/00
			5/24/07

PURPOSE

To provide financial support to eligible employees taking job-related college courses or specific courses included as part of an approved Career Development Plan.

ELIGIBILITY

Employees must be employed by the Foundation for a period of at least twelve months in a full time, full benefited position to receive benefits under this program. Full time employees paid from contract or grant funds and campus programs are encouraged to participate in the Education Assistance Program if funds can be provided by the agency funding the individual contract, sponsored program or grant or if sufficient funds are available through the respective department.

Full time is defined as working a scheduled 40-hour week.

COURSE LOAD LIMITS

An eligible employee may request financial assistance for up to a maximum of 6 units per quarter.

QUALIFYING PROGRAMS

The Foundation will consider financial assistance for job-related courses in adult education programs, or any Western Association of Schools & Colleges (WASC) (or similar accreditation) accredited university or college.

The Foundation will provide financial assistance for courses taken as part of an approved Career Development Plan.

APPLICATION/APPROVAL PROCEDURE

Employees requesting financial assistance as part of an approved Career Development Plan must first submit an Application for Participation in the Career Development Plan. Approval of Career Development Plans is contingent upon a showing of mutual benefit to the employee and the Foundation.

The Foundation reserves the right to review individual Career Development Plans from year to year and may discontinue approval for continued participation at any time.

Employees taking job-related courses need only complete the Application for Reimbursement form. A separate Application for Reimbursement must be completed for each quarter or semester an employee wishes to participate in this program. Substitution of courses cannot be made without prior approval.

REIMBURSEMENT GUIDELINES

The maximum level of Foundation reimbursement will be based on the Cal Poly Pomona's fee schedule (excluding Application Fees) for up to six units. The employee is responsible for application fees, admission fees, books and miscellaneous supplies.

Employees in graduate-level approved Career Development Plans must achieve a grade of "B" or better to qualify for reimbursement. A grade of "C" or better must be achieved in all other courses to qualify for reimbursement.

REIMBURSEMENT PROCEDURE

Employees taking classes at Cal Poly Pomona may submit their University Fee Invoice for reimbursement prior to starting the course. Employees electing this method of reimbursement must then submit satisfactory evidence of course completion (with the required grade achievement) or reimburse the Foundation before additional courses will be approved for reimbursement.

When courses are taken at other institutions, employees are responsible for submitting all receipts and a grade report at the end of the course to the Foundation Human Resources Director for reimbursement.

RELEASE TIME FROM WORK

The supervisor may approve time off from work when the course is taken for credit at Cal Poly Pomona and work schedules can be adjusted to make up work time.

ADMINISTRATION OF PROGRAM

The Foundation Human Resources Director, under the direction of the Executive Director of the Foundation, has overall administrative responsibility for this program.

Supervisors and department heads are primarily responsible for determining if courses and/or Career Development Plan have sufficient job-relatedness to justify reimbursement.

Career Development Plans require the additional approval of the Executive Director of the Foundation.

All exceptions to this program require the approval of the Executive Director of the Foundation.

TRANSFERABILITY TO SPOUSE OR DEPENDENT

With prior approval from the Human Resources Director, any employee who is eligible to receive benefits under this program may transfer their benefit to a qualifying dependent, with the following conditions:

- 1) Once an employee meets the eligibility criteria within this policy, that employee may receive reimbursement under this policy, or the benefits may be transferred, once, to one dependent of the employee.
- 2) Once an employee has received benefits under this program, no transfer of benefits can occur.
- 3) If an eligible employee transfers their benefits to a qualified dependent, no additional transfers may occur.

- 4) When the benefit is transferred to a dependent, the maximum amount of reimbursement for that dependent shall not exceed the dollar amount equal to the dollar amount that would be paid for six units per semester to Cal Poly Pomona.
- 5) Benefits transferred to a dependent may only be applied toward tuition or fees originating at the California State University, a University of California, or a California Community College.
- 6) For the purposes of this policy, a qualifying dependent is any of the following:
 - a) A spouse or domestic partner of the employee, and such a person is living in the same physical household as the employee.
 - b) A dependent child, where the employee is either a biological parent of the child or has legal custody of the child via adoption or other court decrees, and the child is under the age of 26.
 - c) Dependents must receive at least a grade of "C" or higher for undergraduate course work, and a grade of "B" or higher for graduate level coursework to receive benefits under this program.