



## **Board Policy No. 223**

### **Tuition Assistance Policy**

**ADOPTED:** 4/12/17

(Implementation effective 7/1/17)

**RECENT AMENDMENT:** 3/10/2021

**SEE ALSO:** 223A

**SUBJECT CATEGORY:** SECTION 200, HUMAN RESOURCES

**SUBSECTION:** BENEFITS

**CONTROL DEPARTMENT:** HUMAN RESOURCES

#### **I. PURPOSE**

The purpose of the Tuition Assistance Policy is to support the professional development, educational advancement, and career growth of AC Transit employees. As a result, the District will benefit from improved employee performance, higher levels of workforce engagement, and increased numbers of qualified internal candidates for promotional opportunities.

#### **II. PERSONS AFFECTED**

All regular full-time and part-time employees who have successfully completed their probationary period and served a minimum of six months with the District. Part-time employees will receive a pro-rated amount that is proportional to the number of hours worked each week using the following formulas:

- If the employee works a regular schedule of at least 20 hours per week, but less than 37.5 hours, they may receive up to 50% of the benefit amount for approved eligible expenses.
- If the employee works a regular schedule of 37.5 hours or more per week, they may receive up to 100% of the benefit amount for approved eligible expenses.

#### **III. DEFINITIONS**

**“Coursework”** means any required curriculum or materials from accredited college classes, certificate programs or online classes.

**“Reimbursement”** means the amount that is paid to the employee to off-set the cost of completing coursework.

**“Repayment”** means the obligation of the employee to repay the entire amount of the reimbursement benefit paid to them if they voluntarily separate from the District within 12 months of receiving the benefit.

**“Verification of Completion”** means attainment of a grade of “C” or better for graded classes. For non-graded classes, employees must provide proof of attendance and satisfactory completion of the course. For example, a certificate of completion or letter in the name of the employee and signed by the instructor or institution would be considered acceptable.

#### IV. POLICY

##### A. Funding

1. The availability of funding for the Tuition Assistance Program is subject to the annual budget process and may be augmented as needed by the General Manager during the mid-year budget review process.
2. Any application for tuition assistance that was approved in one fiscal year, but expected to be paid in the next fiscal year shall be encumbered in the next fiscal year's budget.

##### B. Eligibility

1. Employee must pay for their expenses upfront and will receive reimbursement of approved and eligible expenses upon successful completion of coursework and submission of required documentation within the required timeframes described in Administrative Regulation 233A.
2. Coursework must be aligned with and support AC Transit's core business, the employee's current duties, or future opportunities within the District.

##### C. Limitations

1. Individuals classified as temporary, direct hire, consultant, or interns are not eligible for tuition assistance.
2. Tuition assistance may not be used for dependents.
3. All coursework must be taken during non-work hours.

##### D. Non-reimbursable Expenses

Non-reimbursable expenses include, but may not be limited to: (1) Equipment such as calculators, computers or other related hardware, lab equipment, etc.; (2) Parking and/or travel related expenses; (3) Room and Board; (4) Late registration fees; (5) Direct payment of student loans to financial institutions; (6) Interest on credit card for eligible expenses.

##### E. Training Required by Management

Employees ***shall not be required*** to use tuition assistance for continuing education or training required or approved by management to perform their existing duties. In these instances, expenses must be paid for by the District and employee may use work time to attend the required coursework, subject to advance approval.

**F. Maximum Reimbursement Amount**

Employee may be reimbursed up to \$2500 *per fiscal year* (July 1-June 30) to off-set the cost of coursework as long as the employee has met the conditions stated in the Administrative Regulation 223A.

**G. Repayment Obligation**

1. An employee ceases to be eligible to apply for or receive Tuition Assistance upon termination (voluntary or involuntary) of employment.
2. Employees who voluntarily leave employment within twelve (12) months from the date of receiving tuition assistance shall reimburse the District in full unless terminated by the District. This may be waived on a case by case basis by the General Manager for employees with extraordinary circumstances or for employees who retire within (12) months of receiving tuition assistance.

**V. AUTHORITY****A. General Manager's Authority**

The General Manager shall enact an Administrative Regulation that provides procedures for administering the Tuition Assistance Policy.