



POLICIES AND PROCEDURES

CORPORATE POLICY

Subject: Educational Assistance Program

Policy No.: 207

Last Revision Date: 07/01/2022

Orig. Date: 04/02/1979

Revision: 5

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A. 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.

B. ELIGIBILITY

Employees must be employed by the Foundation for a period of at least twelve months in a full time, 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.

C. COURSE LOAD LIMITS

An eligible employee may request financial assistance for a maximum of two (2) courses or six (6) units per term, whichever is greater.

D. 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 college level courses taken as part of an approved Career Development Plan.

E. APPLICATION/APPROVAL PROCESS

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.



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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 term an employee wishes to participate in this program. Substitution of courses cannot be made without prior approval.

F. REIMBURSEMENT GUIDELINES

The maximum reimbursement amount per academic year for undergraduate coursework shall not exceed the annual amount for Basic Tuition Fees (0 – 6 units per term) applicable for undergraduate tuition at Cal Poly Pomona, and the maximum amount for graduate coursework shall not exceed the annual amount for Basic Tuition Fees for graduate coursework at Cal Poly Pomona. The employee is responsible for application fees, admission fees, books and miscellaneous supplies.

Those receiving benefits under this policy regarding graduate-level courses must achieve a grade of “B” or better to qualify for reimbursement. A grade of “C” or better must be achieved in undergraduate courses to qualify for reimbursement.

G. 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 Employment Services Department for reimbursement.

H. 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.

I. ADMINISTRATION OF PROGRAM

The 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.

J. TRANSFERABILITY TO SPOUSE OR DEPENDENT

Any employee who is eligible to receive benefits under this program may transfer their benefit to a qualifying spouse, registered domestic partner or dependent child with the following conditions:

- 1) A spouse, registered domestic partner or dependent child must be enrolled in a qualifying program within higher education that leads to a degree, certificate, or credential.
- 2) When the benefit is transferred to a spouse or domestic partner, only one person may receive benefits at a time (e.g. the employee, the spouse, or domestic partner). However, when the benefit is transferred to a child paragraph (2) becomes applicable.
- 3) Up to two qualifying dependent children of the employee may receive benefits under this program at the same time. Benefits transferred to a spouse, domestic partner, or children may be applied toward tuition or fees originating only at the California State University, a University of California, or a California Community College.
- 4) For the purposes of this policy, a qualifying spouse, registered domestic partner, or dependent child is defined as any of the following:
 - a. A spouse or registered domestic partner of the employee when such a person is living in the same physical household as the employee.



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- 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 has not attained the age of 26.