

TUITION REIMBURSEMENT, SEMINAR AND CONFERENCE FUND
For Employees of Bargaining Unit 10
Administered by the DAS/Human Resources Division
Pursuant to Article 10 of Union Agreement

Revised July 1, 2009

I. Policy Review

The State of Ohio and Scope/OEA recognize that certain benefits accrue both to the agencies and to their employees through participation in continuing education activities, including attendance at professional conferences, seminars, and enrollment in educational programs, by maintaining licensure and certification, and by obtaining continuing education units (CEU's) required in many disciplines.

II. Employee Eligibility

All employees of Bargaining Unit 10 who are in an active pay status or are on an approved education leave are eligible to receive reimbursement for fees and expenses (excluding travel) for attendance at seminars, workshops and conferences, and for tuition reimbursement.

(NOTE: THIS FUND DOES NOT PAY FOR - PARKING, TRAVEL, FOOD, OR LODGING EXPENSES. REIMBURSEMENT FOR THOSE EXPENSES SHALL BE GOVERNED BY OBM EXPENSES AND TRAVEL REIMBURSEMENT POLICY)

In agencies where a tuition reimbursement, seminar or conference fund exists, employees must apply first to the fund established by Article 10.03 of the collective bargaining agreement (CBA) between the State of Ohio and the State Council of Professional Educators OEA/NEA (SCOPE). Upon exhaustion of this fund, employees may then apply to their agency fund for reimbursement. In no case shall the total reimbursement to any employee exceed eight thousand dollars (\$8,000) for the life of the contract and a cap of three thousand five hundred dollars (\$3,500) in any one fiscal year.

III. Types of Programs

- A. Tuition reimbursement for fees and expenses may be requested from any of the following: accredited degree granting college or university; continuing education programs; accredited correspondence schools.

(NOTE: An employee receiving tuition reimbursement for any of the above must agree that if the employee voluntarily terminates state employment within nine (9) months after completing coursework for which the employee had been reimbursed

from the fund, the amount of the reimbursement shall be repaid to the State of Ohio.)

- B. Reimbursement for fees and expenses may be requested for attendance at seminars, conferences and workshops.
- C. Reimbursement for fees and expenses for attendance at seminars, conferences, and workshops, which award CEU credit. This credit must be applicable toward renewal of licensure or certification for the position the employee currently occupies for the state.

IV. Approval Criteria

In order to be considered for reimbursement, courses, seminars, conferences and workshops must be job related or reasonably related to employment opportunities in the bargaining unit, advancement in bargaining unit jobs, or in the case of CEU's, must be applicable towards licensure or certification for the position, which the employee currently occupies for the state.

V. Reimbursement

- A. Tuition, Seminars and Conferences

100% reimbursement with a eight thousand dollars (\$8,000) for the life of the contract and a cap of three thousand five hundred dollars (\$3,500) in any one fiscal year. (This is a total for the whole fiscal year no matter if it is tuition or conferences). In order to be eligible for reimbursement of fees and expenses for, attendance at seminars, workshops and conferences, and for tuition reimbursement under Article 10.03 of the CBA, **employees must attend the seminar, workshop, conference or class in the same fiscal year from which they are applying for the reimbursement.**

- B. The employee must attain a grade of "C" or higher in order to be reimbursed.
- C. Applications will be approved on a "first come, first served" basis. The date DAS receives the application shall be the date used to determine approval, not the date of the conference or class.
- D. Time off work on approved leave of absence shall not be compensated from this fund.

VI. Application Procedure

- A. The employee obtains the tuition reimbursement application (attached) from their agency Labor Relations Professional or a union site representative.

B. The application must be complete, including required signatures by management representatives. **The application will be returned to the employee if it lacks the correct signatures.**

1. Where the application requests information concerning job relatedness, or bargaining unit relatedness, please be specific.

2. If a course is not job related or bargaining unit related, you are still eligible for reimbursement if your degree is related.

3. Please note – each application must include the following:

a. Copy of the official course(s) description from the school's catalog (or syllabus), or official flyer describing the seminar or conference;

b. Verification of the cost of the course (i.e., fee schedule listing cost per credit hour and fees from the school catalog or itemized statement), seminar or conference.

c. The application must indicate if the course is graduate level. The state must report all reimbursement for graduate level courses to the IRS and provide an appropriate information form to the employee, as such reimbursement is defined as taxable income pursuant to federal tax code.

4. The completed application, with attachments, is to be forwarded to:

Office of Learning and Professional Development Staff

Voice: 614.728.3127 or 614.752.2451

Email: EPDP@das.state.oh.us

Fax: 614.728.3710

Effective for classes after 1/31/08, all applications (tuition and seminar) must be submitted to DAS no later than thirty (30) days after the start of the course.

C. DAS will send notification of approval or disapproval to the employee within fifteen (15) days of receipt, if possible.

D. Upon completion of the course, seminar, or conference, the following must be submitted to DAS:

1. For tuition – legible copies of your final grades, receipt for book(s) and proof of final payment for the course(s) (**if** using a check for proof of payment, please show front and back of check).
2. For seminars and conferences – legible copies of proof of final payment, and proof of attendance (certificate).

Please note – you will not receive reimbursement until the above-indicated information has been provided to DAS. Verification of completion and any related expenses shall be submitted by the employee with thirty (30) days of the completion of the course, seminar or conference, if possible.

DAS shall reimburse employees by direct deposit into designated bank account or by mailing a check to the employee with thirty (30) days of receipt of verification, if possible.

All questions regarding the Tuition Reimbursement, Seminar and Conference Fund should first be directed to the employee's union delegate or Labor Relations Officers.

Any grievance involving denial of reimbursement for the OEA Fund should follow the normal grievance process outlined in the employees' collective bargaining agreement.

To allow for timely processing, applications must be received prior to a cutoff date established by the Department of Administrative Services for year end processing in June of each fiscal year. If approved, reimbursement shall be paid from that fiscal year's funding, providing money is still available in fund. Applications for classes to be taken in the next fiscal year, received on or after cutoff date, if approved, will be processed after July 1st.

The parties shall discuss any changes in the fund at the State-Wide Labor/Management Committee.