4.75 Staff Tuition Reimbursement Program

Purpose:
The purpose of the Staff Tuition Reimbursement Program (hereinafter referred to as Program) is to encourage continual learning and educational development by providing tuition reimbursement to eligible Merit and Professional & Scientific (P&S) staff for coursework taken from an Iowa regents university.

Policy Statement:
Tuition Reimbursement may be made available for courses offered by the University of Northern Iowa (UNI) or Iowa regent universities other accredited post-secondary institutions. The program is available to Merit and Professional & Scientific P&S staff members holding a non-temporary position appointment of at least twenty (20) hours per week and having at least one year of continuous non-temporary UNI University service. The qualified tuition-only reimbursement for undergraduate credit courses provides one hundred percent (100%) of the tuition-only cost for the course without exceeding UNI’s resident tuition rate. The number of undergraduate awards will be determined by the amount of funding allocated for the Program each year. The qualified tuition-only reimbursement for graduate credit provides no less than ninety percent (90%) and up to one hundred percent (100%) coverage without exceeding UNI’s resident tuition rate. The number of graduate awards and percent covered will be determined by University UNI funding availability. A staff member may qualify for up to twelve (12) credit hours of approved study per academic year, not to exceed six (6) credit hours in a single academic semester or session under the Program.

Procedure:
The Program is administered by the Human Resource Services (HRS) Director, or designee (hereinafter referred to as HRS Director). The policy statement and the following conditions will serve to guide the administration of the program.

A. Funding
The Program will be administered within budgeted funds. Program funding will be reviewed and a revised allocation request will be submitted by the HRS Director to the Senior Vice President for Administration & Financial Services Finance & Operations in advance of the beginning of each fiscal year. Program awards are for tuition costs only and the employee is responsible for any additional costs of study, including mandatory fees. Neither tuition nor additional costs of study can be supplemented by other University university or UNI Foundation funds.

The Program does not provide funding for courses determined to be a requirement of the Merit or Professional & Scientific P&S staff member’s current University UNI position and the employing department is responsible for funding the tuition and any additional costs of study associated with such.

B. Eligibility Requirements
A staff member’s Annual Application will be considered only if the staff member:

- Has at least one year of continuous service and is working at least twenty (20) hours per week in a non-temporary capacity by the course start date.
● Meets the regular academic and admission requirements of the institution where courses are being taken.
● Does not have any outstanding financial obligations to UNI.
● Is not on academic probation or suspension at UNI or at the institution offering the course.
● Submits the Annual Application to HRS no later than July 1.

C. Program Requirements

● Staff whose Annual Application is approved for a Program award are required to submit a Semester Request form identifying their registered courses. The Semester Request must be received by HRS no later than the first day of class. Revised Semester Requests will be accepted after this date and additional requests for credits will be added to the waiting list.
● Merit staff members’ course of study must have a relationship to the employee’s UNI position duties and/or requirements leading to the development of skills and/or knowledge needed by the institution or another State Agency, unless the employee is pursuing an undergraduate degree.
● Professional & Scientific P&S staff members’ course of study must have a relationship to the employee’s position duties at UNI and/or requirements leading to the development of skills and/or knowledge needed by the institution, unless the employee is pursuing an undergraduate degree.
● A Staff Tuition Reimbursement (hereinafter referred to as Reimbursement) will only be awarded if class attendance can be arranged so that it does not interfere with the staff member’s ability to carry out regular position responsibilities or assignments.
● Class attendance may not be counted as regular work time. Neither additional compensation nor compensatory time is allowed for class attendance or for course-related activities occurring outside regularly scheduled hours of service.
● Reimbursement may be awarded for University-university and other approved correspondence or guided independent study.
● All coursework must be started during the semester or session indicated on the approved Semester Request form and must be completed within one year of the course end date.
● The staff member may receive other financial aid from sources other than non-Program-program University-university funds, however the Program will only reimburse the remaining tuition-only costs as indicated on the official receipt of payment.
● Reimbursements for short courses, workshops, conferences, course audits, etc., are not authorized under the Program unless such work carries credit by an accredited post-secondary institution Iowa regents university.
● The staff member must complete the approved coursework with a grade point of no less than 2.0 (“C” grade) for undergraduate credit and 3-62.7 (“B-” grade) for graduate credit on a 4.0 grading system or equivalent grade under a different grading system.
● If a staff member receives a grade of RC* they have one year from the course end date to complete their research and submit a grade to HRS. Staff members who receive an RC and are enrolled in the same course consecutively have one year from the most recent course end date to complete their research and submit a grade to HRS. *RC - Research Continued: As defined by the Office of the Registrar.
● The staff member must maintain continuous employment at UNI for the duration of the course in order to be eligible for tuition reimbursement through this Program. Termination of UNI employment prior to completion of an approved course will result in disqualification and any reimbursement award for those credits will be rescinded, unless termination is the result of layoff or death.
• Staff members must maintain employment at UNI or another State Agency for one month per credit hour after the satisfactory completion of the course, unless termination is the result of layoff or death. Number of credit hours is based on the approved Staff Tuition Reimbursement Program Semester Request form(s) for the most recent term.

D. Pre-Application
Prior to applying for the Program the staff member must:

• Review the requirements of the Program and determine if they are eligible.
• Meet with their supervisor or department head to discuss their interest and reasons for pursuing the proposed course of study.
• If pursuing a graduate degree, Merit staff members must demonstrate the relationship of the proposed course of study to the employee’s position and duties at UNI and/or requirements for developing skills and/or knowledge needed by the university or another State Agency.
• Professional & Scientific (P&S) staff members pursuing a graduate degree must demonstrate the relationship of the proposed course of study to the employee’s position duties at UNI and/or requirements for developing skills and/or knowledge needed by the university.
• Verify they meet the academic and admission regulations of the institution where the proposed courses are offered.

E. Annual Application
Staff members are required to complete a new application for each year of participation in the Program. Staff members must:

• Complete the Staff Tuition Reimbursement Program Annual Application (available in the Forms Repository) and submit it to their supervisor and department head for approval.
• Ensure the completed and signed application is received by HRS prior to July 1st for the upcoming academic year.

F. Awards
• Final approval will be given by the HRS Director after reviewing eligibility and program requirements.
• Once approved, awards will be made within the limits of budgeted program funds. Staff members who previously received the Reimbursement are not guaranteed an award in subsequent years.
• Staff members who meet the July 1st deadline and are eligible, but are not awarded due to lack of budgeted funds, will be placed on the waiting list. Priority will be based on the following criteria: Priority for awards will be as follows:
  o First priority will be given to active participants in the prior academic year.
  o Second priority will be based on “benefits eligible” years of service.
• 1st Priority—Regents institutions; institutions of higher education with a partnership agreement with Regents Institutions (see section 2.1(4)(I)) “Educational Tuition Assistance Principles” of the Board Policy Manual) or the University of Northern Iowa; and other accredited institutions in Iowa.
  ➔ If needed, priority within this level will be based on “benefits eligible” years of service.
• 2nd Priority—Out of state United States accredited institutions.
  ➔ If needed, priority within this level will be based on “benefits eligible” years of service.
• Staff members who do not meet the July 1st deadline and are eligible, but are not awarded due to lack of budgeted funds, will be placed on the waiting list. Priority will be based on the date HRS
received the annual application and they will be positioned after those who did meet the deadline, and then based on the criteria indicated above.

- HRS will inform the staff member of whether they have been awarded the Reimbursement and the initial amount of Reimbursement in a timely manner.

- Staff members who meet the July 1st deadline and are eligible, but are not awarded due to lack of budgeted funds, will be placed on the waiting list. Priority will be based on the criteria indicated above. If additional funds become available, the staff member’s application may be reassessed for eligibility.

- Staff members who do not meet the July 1st deadline and are eligible, but are not awarded due to lack of budgeted funds, will be placed on the waiting list. Priority will be based on the date HRS received the annual application and they will be positioned after those who did meet the deadline and then based on the criteria indicated above. If additional funds become available, the staff member’s application may be reassessed for eligibility.

If, after being awarded Reimbursement, a staff member does not meet the grade requirement of the Program, the amount awarded for tuition for those credits, and the credits themselves, will be deducted from the total tuition and credits awarded on their Annual Application.

**G. Semester Request**

- A staff member awarded a Reimbursement will need to complete the **Staff Tuition Reimbursement Program Semester Request** form (available in the Forms Repository) and submit it to their supervisor and department head for approval. The completed and signed request form must be received by HRS prior to course start date/first day of class.

- The HRS Director will review and approve the request form to ensure it substantiates the original application request. If the request form is properly completed and all eligibility requirements are met, the HRS Director will approve the form.

- Failure to properly complete the request form disqualifies the staff member for reimbursement that semester or session.

**H. Payment**

- For UNI coursework:
  - Final grades will be obtained by HRS from the UNI Registrar’s Office. If awarded other scholarships and grants, only the remaining tuition-only costs will be reimbursed.
  - The staff member enrolled in UNI courses may request deferred payment by completing the **Employer Reimbursement Deferred Payment Agreement** form. The enrollment fee will be waived.
  - Reimbursement will be applied directly to the staff member’s U-Bill as part of Financial Aid after verification of achievement of the required course grade.

- For external coursework:
  - Reimbursement will be provided following submission of both evidence the course has been completed with achievement of the required grade and a receipt showing the tuition-only cost for the course. Both the grade report and the receipt must be submitted to the HRS office within thirty (30) days following the completion of the course.
    - If awarded another type of scholarships and grants, only the remaining tuition-only costs will be reimbursed. An accounts payable disbursement will be issued electronically to the staff member’s bank account.
○ Termination of a staff member’s UNI employment prior to the completion of the course(s) will be considered a disqualification from the Program and payments will not be processed, unless termination is the result of layoff or death.

○ Termination of a staff member’s UNI employment prior to their commitment to maintain employment at UNI or another State Agency for one month per credit hour after the semester or session end date will be considered a disqualification from the Program, unless termination is the result of layoff or death. The disqualified staff member will be required to pay UNI one hundred percent (100%) of the most recent tuition reimbursement.

○ Tuition reimbursement will not be subject to tax withholdings if below the annual IRS limits (section 127 of the Internal Revenue Code). Reimbursements above this limit will be treated as taxable income and will be reported on the staff member’s Form W-2 (box 1).

Human Resource Services, approved August 6, January 3, 2024
President’s Cabinet, University Council, approved May 49, 2024
President and Executive Management Team, President’s Cabinet, approved June 4, 2024.