

North Central Workforce Development Area

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LOCAL DIRECTIVE

Directive #: <u>02-26</u>	Date: <u>November 1, 2002</u>
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TO: SkillSource Staff

FROM: Dave Petersen, Executive Director

SUBJECT: Education Assistance

SUPERCEDES: Draft Directive #00-12

Effective Date: November 1, 2002

SkillSource may reimburse eligible employees for courses of study to improve present job performance and prepare employees for potential advancement.

Employees may be reimbursed for completing courses offered by accredited educational institutions or professional training organizations, but must be directly related to a SkillSource administrative or training function.

First priority is usually given to courses that improve an employee's present job performance.

Secondary priority is usually given to courses furthering an employee's career development and advancement with SkillSource.

In the event of limited resources, only job improvement courses are generally reimbursed.

Courses that are related to minimum qualifications for SkillSource positions are generally eligible for reimbursement. These courses include, but are not limited to: business, education, information systems, computer technology, accounting, math, English, public administration, Spanish, planning, economics, personnel, psychology, political science, sociology, counseling, or communications.

Courses unrelated to minimum qualifications for SkillSource positions are typically not eligible for reimbursement.

GUIDELINES/PROCEDURES

1. ELIGIBILITY CRITERIA - Requests must meet the following criteria:

Regular employment (excludes probationary employees) at the time of application and the time reimbursement is made;

The knowledge and skills to be acquired are not provided through in-house training;

Scholarships and/or grants are deducted from total course costs to determine SkillSource's potential reimbursement.

2. REIMBURSEMENT PRIORITY - Reimbursement will be categorized as Priority 1 or Priority 2 according to the following:

Priority 1. (Job Improvement) – Employees must describe how each course is directly related to their current job and how it will improve their skills, knowledge and abilities to perform their job. Additionally, employees must state an outcome(s) that may be achieved as a result of completing the course. Refer to attachments 1-3 for examples of descriptions and outcomes. The examples should be used as tools to help employees complete the education assistance application. The courses/classes used in the examples will not automatically be approved. Employee supervisor will review request and make recommendation to Human Resources Manager. Final determination whether the training relates to the employee's current position will rest with the Human Resources Manager.

Priority 2. (Job Advancement) – Employees must list a potential SkillSource job(s) they desire to advance to and describe how each course may enhance their potential career growth and advancement to the desired job(s). Degree programs will not be approved in their entirety, each course must be individually approved. Additionally, descriptions must include the certification, credential, minimum and/or preferred job qualification, etc. that may be acquired by completing the course. Refer to attachments 3 and 4 for examples of descriptions and outcomes. The examples should be used as tools to help employees complete the education assistance application. The courses/classes used in the examples will not automatically be approved Employee supervisor will review request and make recommendation to Human Resources Manager. Final determination whether the training relates to the employee's advancement will rest with the Executive Director.

3. APPROVAL PROCESS – Prior to registration for each course, submit application and a copy of the course description(s) to Supervisor and obtain formal approval from the Human Resources Manager. Course enrollment is the responsibility of the employee.

Approved applications will be forwarded to accounting until documentation is submitted for payment.

4. LIMITATIONS - Approved courses will be reimbursed up to 100 percent if the employee earns an A (3.4 to 4.0); 75 percent for a B (2.7 to 3.3); 50 percent for a C (2.0 to 2.6). Grades below C (2.0) will not be reimbursed. A passing grade for pass/fail courses will be reimbursed at 75 percent.

Tuition reimbursement may be up to \$2,000 per employee during a fiscal year. Exceptions to the limit may be granted by SkillSource's Executive Director.

5. ALLOWABLE EXPENSES - Payment is limited to tuition and/or registration fees and does not include textbooks, supplies, or lab fees. Travel expenses may be reimbursed according to SkillSource Travel Reimbursement policy, subject to preapproval by SkillSource Executive Director.

6. REIMBURSEMENT - Employees must submit (1) a receipt or proof of tuition payment, and (2) a report card or evidence of satisfactory completion to the Supervisor upon course completion to receive reimbursement.

EDUCATION ASSISTANCE APPLICATION

Applications must be submitted to supervisor and formal approval obtained from the Human Resources Manager prior to registration for each course(s).

NOTE: To receive reimbursement, submit (1) a receipt or proof of tuition payment, and (2) a report card or proof of satisfactory completion to the Supervisor upon course completion.

Name: _____ **Job Title:** _____

Course/Workshop Title: (Attach Description)	
School/Organization:	
Beginning Date:	
Ending Date:	
Credit Hours:	
(A) Tuition:	\$
Other Allowable Expenses (list below):	\$
	\$
(B) Total Expenses	\$
(C) Scholarships/Grants Total (if applicable)	\$
Total Cost (A+ B) -C	\$

Priority 1: Describe how this course is directly related to your current job and how it will improve your skills, knowledge and abilities to perform your job. State an outcome(s) that may be achieved as a result of completing the course.

Priority 2: List a potential SkillSource job(s) you desire to advance to and describe how this course may enhance your potential career growth and advancement to the desired job(s). Include the certification, credential, minimum and/or preferred qualification, etc. that may be acquired.

Employee Signature: _____ **Date:** _____

Supervisor Recommendation:	Yes _____	No _____
Reason:		
Signature:	Date:	
Human Resources Manager Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	
Executive Director Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	

ATTACHMENT 1

EDUCATION ASSISTANCE APPLICATION

Applications must be submitted to supervisor and formal approval obtained from the Human Resources Manager prior to registration for each course(s).

NOTE: To receive reimbursement, submit (1) a receipt or proof of tuition payment, and (2) a report card or proof of satisfactory completion to the Supervisor upon course completion.

Name: Michael Smith

Job Title: Training Consultant

Course/Workshop Title: (Attach Description)	Organizational Staffing (HRM 445)
School/Organization:	Central Washington University
Beginning Date:	1/6/03
Ending Date:	3/23/03
Credit Hours:	5
(A) Tuition:	\$500
Other Allowable Expenses (list below):	
Registration Fee	\$20
	\$
(B) Total Expenses	\$20
(C) Scholarships/Grants Total (if applicable)	\$0
Total Cost (A+ B) -C	\$520

Priority 1: Describe how this course is directly related to your current job and how it will improve your skills, knowledge and abilities to perform your job. State an outcome(s) that may be achieved as a result of completing the course.

This course covers recruitment, selection, placement, retention and career development, which is directly related to my job. As a result of the course, I will be able to provide new and improved staffing techniques to employers.

Outcome: I plan to have a 5% increase in OJT contracts and/or a 5% increase in my placement rate over the next program year.

Priority 2: List a potential SkillSource job(s) you desire to advance to and describe how this course may enhance your potential career growth and advancement to the desired job(s). Include the certification, credential, minimum and/or preferred qualification, etc. that may be acquired.

N/A

Employee Signature: _____ **Date:** _____

Supervisor Recommendation:	Yes _____	No _____
Reason:		
Signature:	Date:	
Human Resources Manager Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	
Executive Director Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	

ATTACHMENT 2 EDUCATION ASSISTANCE APPLICATION

Applications must be submitted to supervisor and formal approval obtained from the Human Resources Manager prior to registration for each course(s).

NOTE: To receive reimbursement, submit (1) a receipt or proof of tuition payment, and (2) a report card or proof of satisfactory completion to the Supervisor upon course completion.

Name: Mary Jones **Job Title:** Certificated Instructor

Course/Workshop Title: (Attach Description)		Communications 102
School/Organization: Big Bend Community College		
Beginning Date:	1/6/03	
Ending Date:	3/21/03	
Credit Hours:	5	
(A) Tuition:	\$300	
Other Allowable Expenses (list below):		
Registration Fee	\$15	
	\$	
(B) Total Expenses	\$15	
(C) Scholarships/Grants Total (if applicable)	\$0	
Total Cost (A+ B) -C	\$315	

Priority 1: Describe how this course is directly related to your current job and how it will improve your skills, knowledge and abilities to perform your job. State an outcome(s) that may be achieved as a result of completing the course.

This course introduces basic theory and practice of effective communication in interpersonal, small group, public and mass communication contexts. Emphasizes self-concept, listening, verbal and non-verbal communication, small group interaction, public speaking presentation techniques and mass communication analysis. As a result of this class, I will have the basic knowledge and skills necessary to create and teach a communications course to our learning center students, which is directly related to my job. In addition, the course will improve my communication skills with our students.

Outcome: Currently SkillSource does not offer a communications course to learning center students. My supervisor has informed me that SkillSource would like to offer a communications course. I would use the knowledge and skills gained from completing Communications 102 to develop and teach a communications course to our students.

Priority 2: List a potential SkillSource job(s) you desire to advance to and describe how this course may enhance your potential career growth and advancement to the desired job(s). Include the certification, credential, minimum and/or preferred qualification, etc. that may be acquired.

N/A

Employee Signature: _____ **Date:** _____

Supervisor Recommendation:	Yes _____	No _____
Reason:		
Signature:		Date:
Human Resources Manager Approval:	Yes _____	No _____
Reason:		
Signature:		Date:
Executive Director Approval:	Yes _____	No _____
Reason:		
Signature:		Date:

ATTACHMENT 3 EDUCATION ASSISTANCE APPLICATION

Applications must be submitted to supervisor and formal approval obtained from the Human Resources Manager prior to registration for each course(s).

NOTE: To receive reimbursement, submit (1) a receipt or proof of tuition payment, and (2) a report card or proof of satisfactory completion to the Supervisor upon course completion.

Name: Sam Syler

Job Title: Training Consultant

Course/Workshop Title: (Attach Description)	Counseling Strategies for Children & Adolescents (PSY567)
School/Organization:	Central Washington University
Beginning Date:	1/6/03
Ending Date:	3/21/03
Credit Hours:	4
(A) Tuition:	\$600
Other Allowable Expenses (list below):	
Registration Fee	\$20
	\$
(B) Total Expenses	\$20
(C) Scholarships/Grants Total (if applicable)	\$0
Total Cost (A+ B) -C	\$620

Priority 1: Describe how this course is directly related to your current job and how it will improve your skills, knowledge and abilities to perform your job. State an outcome(s) that may be achieved as a result of completing the course.

This course covers basic counseling treatment strategies for common problems presented by child and adolescent clients. As a result of this course, I will learn new strategies that I can utilize when counseling youth participants. These strategies will help me counsel youth participants more effectively so that they will remain in school and/or retain employment etc. This is directly related to my job.

Outcome: I plan to have a 5% increase in skill attainment over the next program year.

Priority 2: List a potential SkillSource job(s) you desire to advance to and describe how this course may enhance your potential career growth and advancement to the desired job(s). Include the certification, credential, minimum and/or preferred qualification, etc. that may be acquired.

My goal is to become an administrator at SkillSource. Obtaining my masters degree may help me meet the minimum and/or preferred qualifications for an administrative position. This course will apply towards a Masters Degree in School Counseling.

Employee Signature: _____ **Date:** _____

Supervisor Recommendation:	Yes _____	No _____
Reason:		
Signature:	Date:	
Human Resources Manager Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	
Executive Director Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	

ATTACHMENT 4 EDUCATION ASSISTANCE APPLICATION

Applications must be submitted to supervisor and formal approval obtained from the Human Resources Manager prior to registration for each course(s).

NOTE: To receive reimbursement, submit (1) a receipt or proof of tuition payment, and (2) a report card or proof of satisfactory completion to the Supervisor upon course completion.

Name: Connie Hill **Job Title:** Program Assistant

Course/Workshop Title: (Attach Description)		Psychology 101
School/Organization: Wenatchee Valley College		
Beginning Date:		1/6/03
Ending Date:		3/21/03
Credit Hours:		5
(A) Tuition:		\$300
Other Allowable Expenses (list below):		
Registration Fee		\$15
		\$
(B) Total Expenses		\$15
(C) Scholarships/Grants Total (if applicable)		\$
Total Cost (A+ B) -C		\$315

Priority 1: Describe how this course is directly related to your current job and how it will improve your skills, knowledge and abilities to perform your job. State an outcome(s) that may be achieved as a result of completing the course.

N/A

Priority 2: List a potential SkillSource job(s) you desire to advance to and describe how this course may enhance your potential career growth and advancement to the desired job(s). Include the certification, credential, minimum and/or preferred qualification, etc. that may be acquired.

My goal is to become a Certificated Instructor at SkillSource. To reach this goal I must obtain my AA degree, BA degree and Teaching Certificate. The psychology course will apply towards my AA degree and will help me reach my goal of Certificated Instructor.

Employee Signature: _____ **Date:** _____

Supervisor Recommendation:	Yes _____	No _____
Reason:		
Signature:	Date:	
Human Resources Manager Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	
Executive Director Approval:	Yes _____	No _____
Reason:		
Signature:	Date:	