

MCS Tuition Reimbursement Program and Advanced Degree Incentive

The Marietta City School District (MCS) values continuing education and encourages employees to further their education and improve their professional skills. In support of this value, the district will allocate funds to provide tuition reimbursement for courses that relate directly to the employee's job responsibilities or are required as part of an overall job-related degree program. MCS will reimburse up to \$20,000 of tuition costs as incurred by certified employees seeking an advanced degree (i.e., beyond a bachelor's degree). Participants will be reimbursed for the cost of tuition only. (Application fees, parking fees, textbook fees, fees for materials related to coursework, and other fees are not considered reimbursable).

NOTE: Tuition Reimbursement program participation requires application and approval PRIOR TO commencement of coursework. Coursework/advanced degree program participation without prior approval will not be eligible for reimbursement under this program.

Section 1: Transition Stipulations - Education Pay to Tuition Reimbursement Program

Employees enrolled in advanced degree programs will be eligible for advanced degree education pay (T5, T6 or T7) under the 2013-2014 MCS salary schedule if the following conditions are met:

- Began program coursework on or before January 1, 2014*; and
- Masters/Specialist advanced degree program is completed and certificate level change is recognized by the PSC on or before December 31, 2015; or
- Doctorate advanced degree program is completed and certificate level change is recognized by the PSC on or before December 31, 2017.

****Individuals engaged in advanced degree programs as of January 1, 2014 are required to submit to Human Resources evidence of program acceptance and engagement and current program transcripts to remain eligible under the advanced degree Education Pay program.***

An employee who is currently enrolled in an advanced degree program, but does not complete their advanced degree program on or before December 31, 2015 (Masters/Specialist) or December 31, 2017 (Doctorate) will, upon completion their advanced degree program (as recognized by a change in certificate level documented by the PSC), be eligible to receive the retention incentive per the terms outlined in Section 4 – Advanced Degree Retention Incentive Program Limits and Illustration.

Section 2: Tuition Reimbursement Program Timeline Requirements

Tuition Reimbursement program participation requires application and approval *PRIOR TO* commencement of coursework. Coursework/advanced degree program participation without prior approval will not be eligible for reimbursement under this program.

Master's or Specialist Degree coursework must be completed within 3 years (36 months) of program initiation (i.e., commencement date of first course taken) in order to be eligible for tuition

reimbursement. Even if a tuition reimbursement account balance remains, coursework initiated 36+ months after program initiation will not be eligible for tuition reimbursement. However, upon completion of the advanced degree program as recognized by a change in certificate level documented by the PSC, an individual will be eligible to receive the retention incentive per the terms outlined in Section 4 – Advanced Degree Retention Incentive Program Limits and Illustration.

Doctorate degree coursework must be completed within 5 years (60 months) of program initiation (i.e., commencement date of first course taken) in order to be eligible for tuition reimbursement. Even if a tuition reimbursement account balance remains, coursework initiated 60+ months after program initiation will not be eligible for tuition reimbursement. However, upon completion of the advanced degree program as recognized by a change in certificate level documented by the PSC, the employee will be eligible to receive the retention incentive per the terms outlined in Section 4 – Advanced Degree Retention Incentive Program Limits and Illustration.

An individual who receives tuition reimbursement and retention incentive under this program may, after an elapsed period of 1 year (12 months) from the date of the fourth and final retention incentive payment, apply and be considered for tuition reimbursement and incentive in pursuit of a subsequent, next level degree.

Section 3 - Tuition Reimbursement Program Eligibility

3.1 – Qualified Tuition Reimbursement Programs/Coursework

- Program results in an advanced degree from an accredited college or university. To check a college or university's accreditation, please follow this link to: <http://ope.ed.gov/accreditation/Search.aspx>.
- Coursework taken requires the acceptance into a formal program, and must be part of a series of courses required for completion of that program; OR
- Coursework taken may be part of a PSC endorsed route to increase individual's certification into areas which are priority needs for the district.
- With the exception of coursework taken to increase certification within district-priority areas, independently taken, stand-alone coursework is not eligible for tuition reimbursement. If such coursework is taken in connection with a current role, funding via professional development should be evaluated for potential use where appropriate.
- MCS will consider tuition reimbursement eligibility for only one (1) of a particular level of degree per employee – i.e., one Master's degree, one Specialist degree, one Doctorate degree. (Note: See Section 2 regarding the elapsed time period required for eligibility to apply for tuition reimbursement for pursuit of a subsequent, next level degree.)

3.2 – Tuition Reimbursement Participant Eligibility Requirements

Employees must receive approval to participate in the tuition reimbursement program **PRIOR TO COMMENCEMENT OF** the coursework for which reimbursement will be sought. (Tuition Reimbursement Program Participation Approval Form is attached and available on Employee Portal).

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New entrants into the Tuition Reimbursement program will be approved during a specified window of time. Tuition Reimbursement Program participation applications submitted during the established window will be prioritized and approved **until school district funds budgeted annually for this program are estimated to be depleted**. Program participation approvals will be distributed across MCS instructional areas in proportion to the number of certified instructional staff in those areas as follows:

- Core Curriculum Instruction: 54% of available funds;
- Non-Core Curriculum Instruction: 10% of available funds
- Special Education: 15% of available funds
- Instructional Support: 20% of available funds

If necessary due to the number of tuition reimbursement application requests received, application considerations will be prioritized to support 1) the pursuit of advanced degrees in hard to fill/district priority areas, and/or 2) the pursuit of degrees in areas which drive student achievement gains relative to individual's current position. MCS will provide notice of district hard to fill and priority areas on the Tuition Reimbursement Participant Application form.

Participant Eligibility:

- Individual must be tenured with MCS, and must have completed 2 consecutive years (24 months) of MCS service, with a minimum annual evaluation rating of proficient/satisfactory;
- Individual must be actively employed in a full-time certified position;
- Individual must be under a regular contract with MCS;
- The coursework credit must be earned outside of the normal workday except for job-embedded course requirements; and
- Employees who have previously participated in the tuition reimbursement program must wait 5 years (i.e., a period of 12 months from the date of the fourth and final retention incentive payment) to become eligible to apply for tuition reimbursement program participation for another degree.

NOTE: If annual performance rating drops below proficient/satisfactory during program participation, current program expense reimbursement will be honored; next occurring course enrollment/expense approval will be suspended. Tuition reimbursement program participation may be re-initiated upon return to acceptable annual performance evaluation rating level.

3.3 – Qualified Tuition Reimbursement Expenses

Only tuition expenses are reimbursable. Application fees, parking fees, textbook fees, fees for materials related to coursework, and other fees are not considered reimbursable.

Section 4 – Advanced Degree Retention Incentive Program Limits and Illustration

4.1 – Advanced Degree Retention Incentive Payment Schedule

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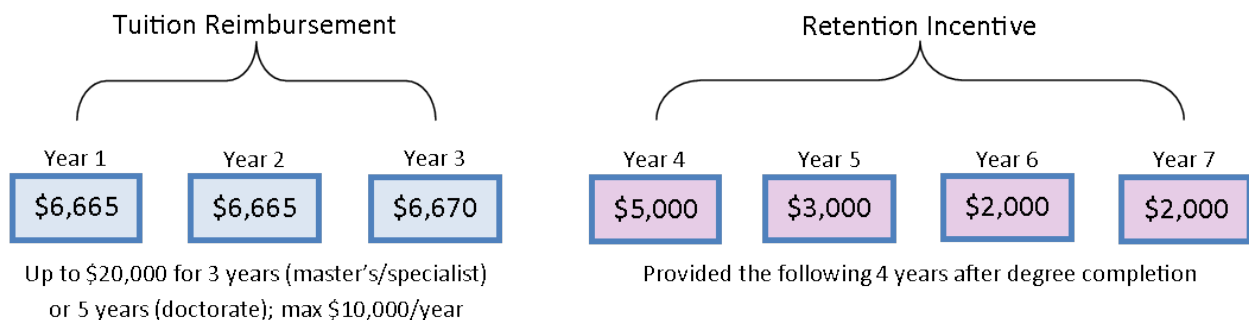
An individual who completes an advanced degree and is eligible for tuition reimbursement under the MCS Tuition Reimbursement Program will be eligible to receive a \$12,000 Retention Incentive. Incentive payments will be issued per the following schedule:

- Payment #1 – The next occurring payroll following MCS Human Resources receipt of confirmation of program completion as recognized by a certificate level change issued by the PSC (lump sum).
- Payment #2, #3 and #4 – Issued with the first pay period of each of the next three consecutive contract periods (lump sum).
- MCS will invest up to \$32,000 per employee for the pursuit of pre-approved advanced degrees through accredited colleges and universities (\$20,000 for tuition reimbursement, and \$12,000 for retention incentive). If an individual encumbers less than the \$20,000 allotted for tuition reimbursement, MCS will increase the retention incentive amount by 50% of the unused eligible tuition reimbursement amount (i.e., maximum \$20,000) upon PSC assignment of certificate level change.
- If new employees are hired by MCS after they have already initiated work in an advanced degree program, they may be eligible for the retention incentive upon completion of their advanced degree as recognized by a certificate level change issued by the PSC, provided their degree is aligned with system priorities and/or current position.

4.2 – Retention Incentive Eligibility

- Individual must remain actively employed with the district (no breaks in employment) during the retention incentive period; and
- Individual must maintain a minimum annual performance evaluation rating of Proficient/Effective during the retention incentive payout period. An annual evaluation rating which falls below “proficient” will result in suspended/delayed payment with the next occurring contract period.

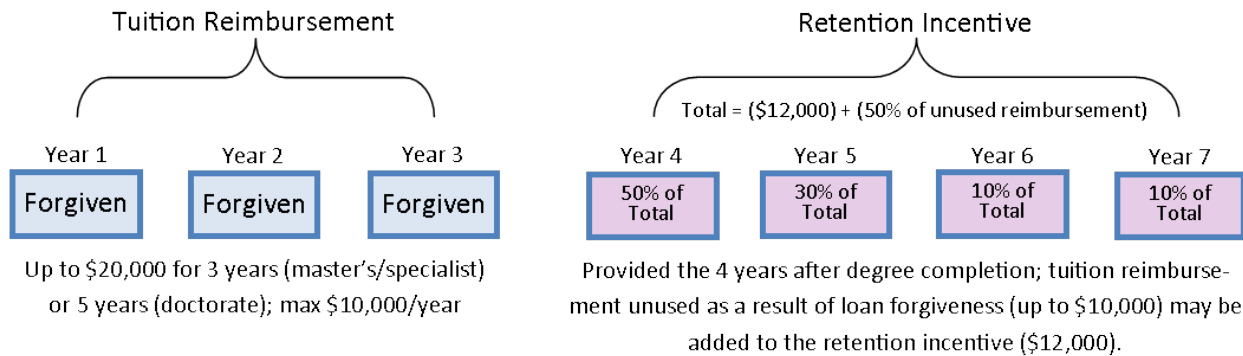
Illustration of Tuition Reimbursement



Section 5 – The Federal Government Teacher Loan Forgiveness Program -Implications for Tuition Reimbursement and Advanced Degree Retention Incentive

Under the Tuition Reimbursement and Retention Incentive Program, MCS will invest up to \$32,000 per employee for the pursuit of pre-approved advanced degrees thru accredited colleges and universities (\$20,000 for tuition reimbursement, and \$12,000 for retention incentive). Teachers who may qualify for the Federal Teacher Loan Forgiveness program will be eligible for limited tuition reimbursement – i.e., the difference between \$20,000 and the amount of Teacher Loan Forgiveness they may qualify for. MCS will increase their retention incentive amount by 50% of the eligible tuition reimbursement amount (i.e., maximum \$20,000) which is unused due to loan forgiveness. The retention incentive will be paid in lump sum installments over a 4 year period as follows:

Illustration of Tuition Reimbursement (Loan Forgiveness)



Example: If \$2,500 is encumbered and \$17,500 is forgiven, \$8,750 (50% of \$17,500, the unused tuition reimbursement amount) would be added to the standard retention incentive of \$12,000 increasing the retention incentive to \$20,750. The new total is allocated to the employee according to the percentages/years listed above.

Section 6 – Tuition Reimbursement Procedures and Timing

In order to qualify for Tuition Reimbursement, employee must have an approved Tuition Reimbursement Program Participation Form on file with MCS Human Resources **PRIOR TO COMMENCEMENT OF** the coursework for which reimbursement will be sought. Provided individual is an approved tuition reimbursement program participant, securing tuition reimbursement will require the following:

- WITHIN SIXTY (60) DAYS of satisfactory completion of a course (i.e., a “pass” or a B or better final grade), submit the following:
 1. Completed Tuition Reimbursement Request form (on website);
 2. Submission of transcript/documentation supporting satisfactory course completion (i.e., a “pass” or a B or better final grade) together with the reimbursement request;
 3. An itemized bill highlighting tuition expenses. College/University account statements that show only a **total** amount will not be accepted. Fees are not eligible for tuition reimbursement. Also, credit card statements, which only show the total amount paid are not accepted. (Fees do not qualify for reimbursement. Receipts **MUST** differentiate tuition cost from fees.)
 4. Itemized bill should be attached to and submitted with a copy of employee’s request for tuition reimbursement; and

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5. Record of course payment/payment receipt, and a copy of front and back of canceled check, credit card or bank statement or student loan statement; OR official notice of payment deferral from college or university in which enrolled.

Section 7 – Tuition Reimbursement Program Application/Participation Timeline

January 2014 – February 2014	Tuition Reimbursement Participant Application window for program “start dates” June 1, 2014 – July 31, 2015.
March 2014	Approved Advanced Degree applicants notified.
March 2014 – May 2014	<i>PRIOR TO</i> the commencement of program participation, program participant provides HR with official documentation confirming university/program acceptance and enrollment. Failure to provide such documentation by May 31st following participation approval will result in suspension from program participation.

Section 8 - Program Amendment

The Superintendent and the Board of Education will continuously seek and apply stakeholder feedback to enhance the value proposition as intended by this program. Amendment and/or suspension of the Tuition Reimbursement and Advanced Degree incentive program are potential outcomes if the state funding model for advanced degrees changes or other economic factors warrant the change. If program changes are deemed necessary, such changes will apply to program enrollees subsequent to the BOE approved program change date, and program transition stipulations will apply (i.e., those already accepted into and participating in the Tuition Reimbursement program as of the change date will continue to be eligible for all program provisions in place as of their program acceptance date) .

MCS TUITION REIMBURSEMENT PROGRAM
PARTICIPANT APPLICATION FORM

Application Window: January 1, 2014 – February 28, 2014
Program initiation window: July 1, 2014 – June 30, 2015

NOTICE: District hard-to fill/priority areas as of 12/31/13:

To be eligible for tuition reimbursement, this Tuition Reimbursement Program Participation Approval Form must be approved by the Superintendent **PRIOR TO COMMENCEMENT OF** the Advanced Degree program for which reimbursement will be sought.

NAME: _____

LOCATION: _____ POSITION: _____

I am hereby seeking approval to participate in a(n)

_____ Degree program offered by
(Type of Degree)

(College/Institution)

PROGRAM START DATE: _____

ANTICIPATED PROGRAM END DATE: _____

Employee Affirmation Statements:

_____ I affirm that my intent is to provide instruction/work in the area in which I am seeking an advanced degree.

_____ I affirm that once notified of program participation approval, I will immediately seek university/advanced degree program acceptance, and will provide official record of such acceptance and program start date to MCS HR on or before May 31, 2014.

_____ I affirm that I have read and understand the Tuition Reimbursement Program guidelines.

_____ I affirm that I understand and agree to the repayment terms and conditions set forth in the Tuition Reimbursement Program Repayment Agreement.

EMPLOYEE SIGNATURE: _____ **DATE:** _____

For Central Office Use

Approved: _____ Denied: _____ Date: _____

Approved by: _____ Title: _____
(Signature)

TUITION REIMBURSEMENT PROGRAM
REIMBURSEMENT REQUEST FORM

NAME: _____

LOCATION: _____

POSITION: _____

COLLEGE/INSTITUTION: _____

ADVANCED DEGREE: _____ STATUS: In Process/Complete (Circle One)

I am an approved participant in the MCS Tuition Reimbursement Program. I have attached receipts showing tuition fees paid, and am hereby seeking reimbursement for Advanced Degree program coursework completed within the last sixty (60) calendar days. I understand that reimbursement is for tuition only, all other fees are excluded.

1. Course Name: _____
Course Begin Date: _____ Course End Date: _____
Tuition Fee: _____

2. Course Name: _____
Course Begin Date: _____ Course End Date: _____
Tuition Fee: _____

Employee Affirmation Statements:

_____ I affirm that I have satisfactorily completed (with a "Pass" or a "B" or better) the course for which tuition reimbursement is being requested.

_____ I affirm that I have read and understand the Tuition Reimbursement Program guidelines.

_____ I affirm that I understand and agree to the repayment terms and conditions set forth in the Tuition Reimbursement Program Repayment Agreement.

***NOTE:** *You must attach a receipt of payment made. Tuition will be reimbursed as expensed, but MCS will NOT be responsible for tuition expense in excess of the total tuition reimbursement program maximum if the actual tuition cost upon conclusion of the course exceeds the tuition reimbursement program maximum (annual or total)*

EMPLOYEE SIGNATURE: _____ **DATE:** _____

****For actual monetary reimbursement, you must submit a copy of your grades, a copy of this form, and a PV form within 60 days from the end of the course to the MCS Central Office - HR.**

For Central Office Use

Pre-Approval on File: Yes/No Date Approved: _____

Approved by: _____ Title: _____
(Signature)

TUITION REIMBURSEMENT PROGRAM

REPAYMENT AGREEMENT

(Applied in the event of voluntary departure from MCS prior to program completion or within 4 years of advanced degree program completion)

As an approved participant in Marietta City School's (MCS's) Tuition Reimbursement Program, I have reviewed the Tuition Reimbursement Program documents and program stipulations. I understand that if I **voluntarily** leave MCS anytime between my receipt of first payment for tuition reimbursement and 4 years following my advanced degree program completion date (as recognized by a certificate upgrade by the PSC), I will be responsible for repaying MCS for tuition reimbursement received per the following schedule:

- 95% of tuition paid by MCS if I voluntarily leave prior to program completion;
- 80% of tuition and retention incentive paid by MCS if I voluntarily leave less than one (1) year following program completion;
- 60% of tuition and retention incentive paid by MCS if I voluntarily leave between one (1) and two (2) years following program completion;
- 40% of tuition and retention incentive paid by MCS if I voluntarily leave between two (2) and three (3) years following program completion; or
- 20% of tuition and retention incentive paid by MCS if I voluntarily leave between three (3) and four (4) years following program completion.

I further understand that in the event of my voluntary departure from MCS either prior to program completion or within 4 years of my advanced degree program completion date (as recognized by a certificate upgrade by the PSC), failure to make the required repayment as stipulated above will result in MCS' filing of a civil action for the recovery of the funds and the submission of a PSC complaint.

Employee Affirmation Statements:

_____ I affirm that I have reviewed and understand the terms of the Tuition Reimbursement program sponsored by Marietta City Schools.

_____ I affirm understanding of my obligation to repay MCS for tuition reimbursement paid to me per an assigned schedule if I voluntarily leave MCS within the defined period of time.

EMPLOYEE SIGNATURE: _____ **DATE:** _____

CENTRAL OFFICE SIGNATURE: _____ **DATE:** _____