

## POLICY 6.7 – Educational Assistance

<b>Policy Category:</b>	Personnel
<b>Subject:</b>	Educational Assistance
<b>Approving Authority:</b>	Board of Governors
<b>Responsible Officer:</b>	Vice-President, Operations and Finance
<b>Responsible Office:</b>	Human Resources
<b>Related Procedures:</b>	<a href="#">Administrative Procedures for Educational Assistance</a>
<b>Related University Policies:</b>	
<b>Effective Date:</b>	July 1, 2013
<b>Supersedes:</b>	December 1, 1998, May 1, 1989, June 20, 2013

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### I. PURPOSE

This policy defines the educational assistance entitlement for PMA Eligible staff at Western for the purpose of encouraging staff members to obtain additional education and qualifications to assist and enhance their career development. It is in accordance with all applicable federal and provincial legislation including, but not limited to the *Income Tax Act*.

### II. DEFINITIONS

**Tuition** – Is the tuition fee for a course or program excluding any supplementary fees such as activity fees, laboratory fees or textbooks.

**Course** – Is a series of academic classes which culminates in a certificate and/or grade being awarded. In order to be eligible for reimbursement under this policy, a course must be related to the staff member's present work duties or anticipated career plan at Western.

**Course Completion Date** - Is the last day of class or the exam date of the course or program, whichever is later.

**III. POLICY**

**1. Educational Assistance**

- a) A staff member who is actively employed at the beginning and successful completion of a course is eligible for tuition reimbursement under this policy subject to the annual limits (the year being June 1 to May 31) outlined below:
  - i) Unlimited Undergraduate Credit Courses at Western;
  - ii) Undergraduate credit courses from other accredited postsecondary institutions, or non-credit courses taken at Western or elsewhere (e.g. Continuing Studies, Information Technology Services) up to an amount equivalent to the domestic tuition fee for two full undergraduate credit courses in Western's Faculty of Arts & Humanities, determined in accordance with the fee schedule for the year approved by the Board of Governors.
  - iii) Graduate Degree Courses or Programs at Western or any Canadian higher education institution up to a maximum of \$4,000 a year. When a staff member is enrolled in a combination of graduate courses, undergraduate courses outside Western, or non-credit courses within the same year, the maximum reimbursement is limited to \$4,000 for the year. In these situations, the educational assistance for the year will be applied first to the graduate courses or programs.
  - iv) Additional financial assistance, over and above what is provided in (i), (ii) and (iii), of up to 50 percent of remaining tuition may be available, with the appropriate President/Vice President's or designate approval, for professional accreditation or upgrading of formal education provided the remaining cost is borne by either the individual staff member or the department/unit and subject to confirmation by the staff member's supervisor/Dean/Budget Unit Head or designate that the learning is directly related to the staff member's present work.
- b) Under special circumstances, Educational Assistance will remain in effect for staff members who are on an approved leave in accordance with [Policy 6.10 - Leaves](#) and [Policy 6.9 - Sick Leave and Long Term Disability](#).
- c) Income Tax Regulations require that for the educational assistance to remain non-taxable to the staff member, the education must benefit Western at least as much as it benefits the staff member. To meet this requirement, a staff member must return from a leave to active employment for at least six months following the completion of his/her program.
- d) The university may request staff members to take certain courses of study, seminars or programs that are advantageous to both the staff member and Western. In these instances, the budgetary unit involved will pay the full cost and grant the staff member sufficient time away from normal duties to pursue the course of study.