

POLICY 8.11 – Educational Assistance Plan

Policy Category: Personnel – Select Administrative Group Employees (SAGE)

Subject: Educational Assistance Plan

Approving Authority: Board of Governors

Responsible Officer: Associate Vice-President (Human Resources)

Responsible Office: Human Resources

Related Procedures: [Procedures for Educational Assistance Plan](#)

Related University Policies:

Effective Date: May 4, 2017

Supersedes: June 26, 2002; September 10, 1999
[Previously MAPP 8.16 – Educational Assistance Plan]

I. PURPOSE

This policy defines the educational assistance entitlement for Select Administrative Group Employees (SAGE) members at Western for the purpose of encouraging employees to obtain additional education to advance their career development. It is in accordance with all applicable legislation including, but not limited to, the *Income Tax Act* (federal and provincial).

II DEFINITIONS

For purposes of this policy a “Course” is defined as 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.

For purposes of this policy, “Tuition” is the tuition fee for a course or program excluding any supplementary fees such as activity fees, laboratory fees or textbooks.

For purposes of this policy, “Course Completion Date” is the last day of class or the examination date of the course or program, whichever is later.

II. POLICY

- 1.00 This Policy applies to those SAGE members who are on “active employment,” as defined in [Policy 8.10](#), at the time the course(s) in question commence. If an employee voluntarily resigns his/her employment or is terminated for just cause prior to the completion date of a course, he/she shall be liable to Western and shall be obligated to repay the full amount of any tuition advanced by Western with respect to that course.

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- 2.00 Courses shall not be taken during normal working hours unless the Supervisor and/or Budget Unit Head (or designate) agrees to it. Western and SAGE agree that the operational needs of the unit shall be pre-eminent in deciding whether to permit an employee to take a course during working hours. Should permission be granted under this section, alternate working hours will be arranged. The Supervisor/Budget Unit Head shall respond in writing to any such request.
- 3.00 Upon the successful completion of a course, up to a maximum of \$100 (inclusive of applicable taxes) will be reimbursed to the SAGE member for the purchase of textbooks (with appropriate receipt(s)). Supplementary expenses, such as activity fees and lab fees, will not be reimbursed.

Credit Courses at Western

- 4.00 For each full or half course taken for credit at Western, the employee will be reimbursed the equivalent of the tuition fee (inclusive of applicable taxes) for a basic undergraduate full or half course, whichever is applicable, in Western's Faculty of Arts and Humanities. Notwithstanding the foregoing, employees who are registered as part-time Masters students at Western will be eligible for financial assistance for tuition per term based on the applicable part-time Masters tuition fee of a typical Masters program in graduate department of the Faculty of Arts and Humanities for the expected duration of the program, up to a maximum of four (4) years.

Credit Courses at another Institution / Non-Credit Courses at Western

- 5.00 With Western's approval (in its sole discretion), SAGE members shall also be eligible for assistance for courses taken at institutions other than Western and/or non-credit courses at Western in accordance with this Policy. The course(s) must be related to the member's present work duties or anticipated career plan at Western. Reimbursement for courses taken at other institutions and non-credit courses at Western shall be in accordance with section 4.00, but will be subject to a maximum of the basic undergraduate tuition cost of two (2) full Faculty of Arts and Humanities courses at Western per year (running between June 1 and May 31). The completion date of the course shall determine the year to which the course is credited.
- 6.00 Reimbursement shall be by direct payment to the employee after proof that the course was passed and the tuition fee bill, with proof of payment, has been provided to Human Resources (unless the fees are paid in advance by Western, in accordance with section 7.00 or 8.00). When a course is taken under section 5.00, an employee who experiences financial hardship as the result of the requirement to pay tuition in advance may make application to Human Resources for an advance of the tuition fees. Such application shall include the reasons for the hardship and the tuition fee invoice. If application is made before the time of registration, information from the institution as to the amount of tuition shall be included in place of an invoice. Employees will be advised as soon as possible whether their application has been approved or denied. The university will not unreasonably deny such applications. Where such requests are accepted, Western shall advance the tuition at the time a tuition fee invoice or acceptable substitute is supplied. If the course is not completed or passed, the repayment obligation in section 8.00 will apply.
- 7.00 Where an employee has completed and passed a course for credit at Western under this Policy, the fees to be reimbursed under section 4.00 for all future Western credit courses shall be paid in advance by the university, subject in all cases to all other requirements of this Policy being met. If the SAGE member does not pay the registration fee, or does not complete or pass the course, the SAGE member will be obligated to repay the funds advanced for the course in equal monthly installments by payroll deductions as agreed by

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Western and the SAGE member in advance. The requirement to repay may be waived in compelling circumstances, but on only one occasion for any particular employee. In such cases, advance payment for a Western credit course would not apply again until the employee subsequently completes and passes another Western credit course for which he/she has been reimbursed under section 4.00.

- 8.00 The university may request that employees take certain courses of study which will be advantageous to both the SAGE member and Western. In such cases, if the employee consents, Western shall bear the full cost of the courses, and will grant the employee sufficient time away from normal duties to pursue the course of study. Such time shall be treated as time worked to be compensated at the regular rate of pay or equivalent time off. Such arrangements must be recorded in writing and agreed to by the SAGE member and Western before the course is taken.
- 9.00 A Professional Allowance of \$300 per year will be available to SAGE members on January 1st of each year. Such monies may be used for courses, computer software, printed materials and/or travel. A completed SAGE Professional Allowance form, available from Financial Services, and original receipts must be submitted for reimbursement up to the \$300 annual maximum.