

WASHINGTON AND LEE UNIVERSITY
Professional Development Funding Program

WASHINGTON AND LEE UNIVERSITY

Professional Development Funding Application (Tuition Assistance)

Overview

Purpose and Scope - Washington and Lee University's Professional Development Program provides tuition assistance to full-time employees seeking to obtain a college level degree, attend educational courses not leading to a degree, or to obtain a work-related certification or license. Requests may be funded fully or partially for courses that will benefit the employee at his or her current position, improve job skills or position the employee for advancement opportunities at the University. Preference will be given to requests leading to an associate or baccalaureate degree, followed by programs leading to a professional license or certification, then by job-related courses not leading to a degree. Conference registrations are not eligible for funding.

Eligibility - All full-time employees in good standing are eligible to submit individual or joint proposals for Professional Development funds.

Taxability - The Internal Revenue Code Sec. 127 allows employees to receive up to \$5,250 of tax-free tuition assistance in a calendar year. Tuition assistance in excess of \$5,250 will be reported as taxable income, except in cases where the course of study is directly connected to your current job requirements. Employees receiving tax-free tuition assistance may not claim the amount of tax-free assistance as a tax credit when filing income tax returns. Courses involving sports, games, or hobbies are not tax-free. Please consult with your tax advisor for further clarification.

Application Process

The basic steps outlined below are required in the application process.

1. Read this packet thoroughly. It will guide you through the process, and answer most of your questions.
2. The effective date of this program will be July 1, 2007.
3. Employees interested in pursuing degrees should contact the University of interests and seek out University financial aid first.
4. Employees wishing to apply for Professional Development funds should discuss their professional goals with their supervisors and seek out departmental funds first.
5. With the approval of their supervisors, employees may complete the attached Request for Professional Development Funds, and a Professional Development Budget Expense Worksheet.
6. Professional Development requests to enter or continue in degree programs for the upcoming Fall and/or Spring terms should be submitted to Human Resources no later than **August 1** of each year. The Director will review all requests and submit his recommendations to the Budget Advisory Committee for final approval based on the funds available.
7. Requests received after August 1st will be funded based on availability of funds.
8. The professional development activity must occur during the **current** fiscal year.
9. In most cases funding will cover tuition costs only. In rare incidences such as where the course of study is required to maintain a work-related license or certification, funding may also cover the cost of books. The costs for tools or equipment that are to be retained by the employee are not tax-free and therefore, will not be funded through this program.
10. Requests should include the estimated tuition costs for an entire academic year.
11. Include copies of all relevant information i.e., college brochures, tuition cost, course schedule and descriptions, catalogs, flyers, etc.
12. If your request is funded, you will be required to provide the Human Resources with records indicating that you satisfactorily completed the course. An employee will not receive tuition assistance until these records are provided.

Professional Development Guidelines for Allocation of Funds

Purpose: Washington and Lee University is committed to increasing the basic education level of full-time employees. In doing so, we will strive to be fair and consistent, recognizing that all employees deserve and will be given consideration for professional development funding.

Professional development funds are determined each year through the annual budgeting process. The Human Resources Director will review the amount of funds requested and expended during the preceding year to determine approximately how much to request during the budget development phase.

Professional Development Funding Priorities:

(Degree Attainment – Course reimbursement)

1. Requests for funds leading to work-related degrees will be given priority over those for non-work-related degrees.
2. Priority will be given to employees seeking associate or baccalaureate degrees.
3. Employees seeking their first degrees will be given priority over those seeking their second degrees, except that an employee seeking his first baccalaureate degree will have equal standing regardless of whether the employee already has an associate degree.
4. Requests for registration assistance to programs that provide a required work-related certification are given priority over those that do not.
5. Requests may be partially funded depending on the number received in a given year.
6. Only those activities included on the Request for Professional Development Funds application will be considered.
7. Professional development budgets may vary from year-to-year; therefore it is important that the employee obtain prior approval before registering for classes.

Request for Professional Development Funds

Date: _____

Applicant's Signature: _____

Supervisor's Signature: _____

Directions: Please provide the requested information. Your request should be submitted to Human Resources at least 30 days before the beginning of classes for which funds are requested. Funds for college tuition will be reimbursed upon successful completion of the approved courses.

Type of Professional Development Activity

Degree Attainment License/Certification Team Activity

Employee Information

Name: _____ Job title: _____

Department: _____ Extension: _____

Professional Development Activity

****Employees are encouraged to request funds from their division/department first.**

Proposed activity: _____ Date of Activity: _____

Brief statement describing how activity will benefit employee:

Has applicant applied for Financial Aid? Yes No If so, how much?

Are funds available from your department? Yes No If so, how much?

Total amount requested for professional development (less departmental funds)

Has requestor received professional development funding in last 3 years? Yes No

If yes, description of last activity awarded.

Date of last activity: _____ How much was awarded?

Is current request related to a previously funded activity? Yes No

Will requestor need additional funding beyond those included in this request? Yes No

If request is for Degree Attainment, when do you anticipate completion of the program?

Complete and attach the Professional Development Budget Expense Worksheet to this request

Professional Development Budget Expense Worksheet

(Provide a copy of the course schedule and costs with this form)

Requestor(s):			
Description of Activity:			
Semester: <input type="checkbox"/> Fall <input type="checkbox"/> Winter <input type="checkbox"/> Spring <input type="checkbox"/> Summer			
Date beginning:		Date ending:	
<u>Activity</u>			
Tuition for course(s) leading to a <u>work-related</u> degree			<u>Estimated Cost</u>
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Tuition for course(s) leading to a <u>non-work-related</u> degree			<u>Estimated Cost</u>
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Tuition for course(s) leading to a <u>work-related</u> license or certification			<u>Estimated Cost</u>
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Course ID	Course Title	Credit Hrs	
Tuition for course not leading to a degree			<u>Estimated Cost</u>
Course ID	Course Title	Credit Hrs	
Total Estimated		Credit Hrs	

For Human Resources Use Only

Request Approved – Fully Partially Amount: \$ _____

Request Denied - Reason: Lack of program funds Outside of program scope Other

Signature: _____

Date: _____