

EDUCATIONAL ASSISTANCE POLICY

STATEMENT OF POLICY

Memorial Health System is committed to assisting in the educational goals and pursuits of employees. This policy currently applies to employees of the following affiliates: Memorial Medical Center, Memorial Health System Corporate, and Memorial Home Services. We offer two means of educational assistance for current and future employees:

- Tuition Reimbursement: Provides assistance to qualified employees to increase their knowledge of their present job and to allow them to develop their potential for advancement.
- Educational Grants: Provides assistance for employees and external candidates to pursue education in exchange for a work commitment once the education is completed. Educational Grants are available to those pursuing health care careers that are deemed critical to the organization's present or projected staffing needs. Grant applications for all careers will be reviewed on a case-by-case basis with a final determination made by the Chief People Officer.

Employees may take advantage of only one type of Memorial Medical Center Educational Assistance at any one time.

GUIDELINES FOR TUITION REIMBURSEMENT

1. Employee eligibility:
 - a. Completion of six months of employment.
 - b. Be a full-time, part-time, or per diem employee who is regularly scheduled to work a minimum of 32 hours per pay period.
 - c. Meet eligibility requirements at the time the course is completed.
 - d. No active corrective action on file and demonstrate behaviors consistent with Memorial's Behavioral Standards and policies.
2. Academic Coursework eligible:
 - a. Related to the employee's present job or to prepare the employee for future advancement.
 - b. Minimum grade of C required in undergraduate courses and minimum grade of B is required in graduate courses.
 - c. Course may be for academic credit or non-credit if approved in advance.
3. Professional Development "Coursework"
 - a. Financial assistance for professional certification coursework may be available through an employee's respective department. Such support is considered on a case-by-case basis, is funded at the department level and requires department manager as well as OMC Representative approval.
4. Reimbursement schedule:
 - a. 100% reimbursement of tuition, books, and required fees with a maximum limit of \$2,500 annually (January 1 through December 31) for employees regularly scheduled to work a minimum of 64 hours per pay period.

- b. 50% reimbursement on tuition, books, and required fees with a maximum limit of \$1,250 annually (January 1 through December 31) for employees regularly scheduled to work a minimum of 32 hours per pay but less than 64 hours per pay period.
5. Tuition reimbursement procedure:
- a. Employee completes Section I of the *Request for Tuition Reimbursement* and forwards the form to his/her manager for approval prior to the start of the course(s). If approved by the manager, the manager will present to the appropriate OMC Representative for final approval.
 - b. Upon OMC Representative approval, the request is returned to the employee to maintain until the course is completed.
 - c. After successful completion of coursework, employee submits previously approved request form, final grade(s), tuition bill, and receipts for textbook purchases to the Human Resources Department. All documentation must be submitted at the same time and within one month after receiving grade(s).
 - d. Human Resources will verify final grade and costs and notify General Accounting to proceed with reimbursement. Based on applicable tax laws at the time of reimbursement, the employee's reimbursement may be subject to taxation.

GUIDELINES FOR EDUCATIONAL GRANTS

- 1. Grants are awarded for coursework that is job-related or professional development courses that are identified by Memorial Health System as relating to the present or future needs of the organization. This could include, but is not limited to, college credit courses.
- 2. Grants may be awarded subsequent to program completion; however, all guidelines and requirements will remain in full effect. Requests for post-education grant awards will be evaluated on a case-by-case basis.

Leadership/Management institutes and/or fellowships conducted by an appropriately accredited academic or professional organization may be considered appropriate with OMC Representative approval.

- 3. Grants will be awarded at the following levels:

Technical courses, associate degree, or bachelor degree completion programs	Up to a maximum of \$5,000
Baccalaureate degrees (traditional)	Up to a maximum of \$10,000
Accelerated Baccalaureate degrees	Up to a maximum of \$15,000
Graduate degrees	Up to a maximum of \$20,000
High demand and high cost graduate/technical programs, e.g. Certified Registered Nurse Anesthetist	Up to a maximum of \$30,000

- 5. Requirements prior to application:

- a. Pre-requisite classes must be completed.
- b. Must have acceptance into the selected program of study (copy of acceptance letter must be submitted).
- c. Applicant's selected educational institution and/or program of study must be fully accredited by an agency recognized by the U.S. Department of Education at the time of application.
- d. Must have a cumulative grade point average of at least 2.50 on a 4.0 scale and must have attained no lower than a "B" average in core classes completed at the time of application.

6. Application Process for Current Employees:

- a. Employee completes the *Educational Grant Application* packet.
- b. Employee must provide verifiable documentation of total program costs. Acceptable forms of documentation include any formal correspondence from the school that identifies program costs. Under no circumstances will an employee receive a grant award that exceeds total program costs.
- c. Employee must provide evidence of the institution and/or program's accreditation status that shall include the names of the accrediting agency/agencies under which the institution claims accreditation.
- d. Once application is complete, employee schedules a meeting with his/her manager to discuss his/her development plan as it relates to career objectives and organizational needs.
- e. If the employee has no active corrective action on file, has demonstrated good performance as evidenced by the most recent performance appraisal, and if the manager believes that the employee's behavior supports Memorial's Behavioral Standards and policies and procedures then the manager completes the "Manager Recommendation" section and the completed *Educational Grant Application* and attachments are then presented, by the manager, to the appropriate OMC Representative for approval. Following OMC Representative approval, the application and attachments are forward to Human Resources.
- f. If the manager believes that the employee does not meet these criteria, the manager discusses these issues with the employee. The *Educational Grant Application* is not forwarded to Human Resources by the manager along with the manager's documentation of the reasons why the employee should not be considered for an Educational Grant.
- g. The Human Resources Department will formally notify all applicants of their acceptance or denial for an Educational Grant.

7. Application Process for External Candidates:

- a. Candidates submit a completed *Educational Grant Application* packet to the Human Resources Department. The application and attachments will be reviewed for approval and the applicant will be interviewed for general employment qualifications by a member of the Human Resource Department.
- b. Candidate must provide verifiable documentation of total program costs. Acceptable forms of documentation include any formal correspondence from the school identifying program costs. Under no circumstances will a candidate receive a grant award which exceeds total program costs.
- c. Candidate must provide evidence of the institution and/or program's accreditation status that shall include the names of the accrediting agency/agencies under which the institution claims accreditation.
- d. Qualified applicants will be interviewed and accepted by the department receiving the applicant at the completion of his/her education.

8. The Human Resources Department will review all completed applications and render decisions of award based on the following criteria:
 - a. Educational preparation will lead to a position that meets a business and/or strategic need of the organization and there is reasonable assurance that the position will be available at the conclusion of the course of study.
 - b. There is funding available to support the grant.
 - c. The applicant is eligible to receive funding based on the information in the completed application, the manager's recommendation and letters of recommendations (for non-employees), and the interview with the Human Resources Department and approval by the appropriate OMC Representative.
 - d. All grant awards are subject to the approval of the Vice President of the department relative to the applicant's course of study.

9. Each semester/quarter, students must furnish grade reports to the Human Resources Department within one month of receipt. If the student is unable to achieve and maintain a minimum of a "B" average in core classes, future payments may be suspended, the student may be dropped from the educational grant program, and/or the student may be required to repay to Memorial any monies previously disbursed.

10. Educational Grants are not paid in lump sum amounts. Payments are made over the course of the degree program and may or may not correspond to the student's academic calendar.

11. Educational Grant recipients must will agree to a work commitment with Memorial Health System at the completion of the recipient's course of study. The work commitment is as follows:

\$2,500	1 year commitment to a full-time position (2080 hours of work)
For each additional \$2,500	An additional year (2080 hours of work) is required up to a maximum of five years, (10,400 hours of work)

This policy has been reviewed and approved by:

F. G. "Woody" Hester, FACHE
 Senior Vice President and
 Chief People Officer

Tuition Assistance policy reviewed - July 2000
 Education Grants policy approved - January 2001
 Policies combined and approved - September 2000
 Review and Revised - February 2005
 Review and Revised – August 2006
 Review and Revised – August 2007
 Review and Revised – November 2007
 Review – April 2009

**EMPLOYEE REQUEST FOR TUITION REIMBURSEMENT
FROM MEMORIAL HEALTH SYSTEM**

GUIDELINES FOR REIMBURSEMENT

1. The employee must complete SECTION I and forward the request forms to his/her Supervisor/Manager for completion of SECTION II prior to attending class(es).
2. If Supervisor/Manager approves, he/she will forward request to the respective OMC Representative for final approval.
3. After the Supervisor/Manager completes SECTION II and OMC Representative has approved, the form is returned to the employee until coursework is completed.
4. After successful completion of coursework, the employee is to submit these forms, final grade(s), tuition bill, and receipts for textbook purchases to the Human Resources Department. **All documents must be submitted at the same time and within 1 month of receipt of grade(s) to the Human Resources Department.**
5. Human Resources will verify final grade(s) and costs and complete SECTION III before submitting forms to the Accounting Department for reimbursement. Depending on current legislation, an employee's reimbursement may be subject to taxation.

TUITION REIMBURSEMENT – SECTION I (Employee)

NAME: _____ DEPARTMENT: _____

POSITION: _____ ID#: _____ SCHEDULED HRS. PER PAY: _____

TITLE OF COURSES	CREDIT HOURS	COST	BOOKS	FEES	TOTAL AMOUNT
1.					
2.					
3.					

School offering course: _____

Objectives sought in taking this course: _____

Course to begin on: _____ To be completed: _____

Will you graduate this semester? _____ Degree: _____

If you receive any scholarship monies, state source and how much you receive: _____

Employee Signature

Date

TUITION REIMBURSEMENT – SECTION II (Supervisor/Manager)

Funding for the education of our employees is based upon the needs of the organization as well as the employee’s educational goals. Employees will be awarded tuition reimbursement based on the employee’s present job skill needs or to prepare the employee for future advancement within Memorial Health System. The tuition reimbursement process requires employees to receive prior approval from their managers for the coursework. If, after discussion and the review of employee file, you believe the employee and the coursework to be appropriate for funding, you will need to complete this evaluation form and forward to your OMC Representative for final approval. Following OMC Representative approval, return all forms to the employee. These forms must be completed prior to the employee attending class(es).

Employee Name: _____	
1. Does the chosen coursework support the present and future business needs of Memorial Health System? If yes, please explain what business need(s): _____ _____	
2. Has the employee received at least 2.50 points on most recent performance appraisal? <input type="checkbox"/> Yes <input type="checkbox"/> No	
3. Does the employee have a record of behavior that supports Memorial’s Behavioral Standards and policies? (If employee has active corrective actions on file, mark “No”.)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Do you recommend the employee for Tuition Reimbursement? <input type="checkbox"/> Yes <input type="checkbox"/> No	
5. Additional Comments: _____ _____	
6. Manager/Supervisor: Please sign this form and forward to OMC Representative for approval.	

_____ Manager/Supervisor Signature	_____ Date
_____ OMC Representative Signature	_____ Date

TUITION REIMBURSEMENT – SECTION III (Human Resources Use Only)

Student’s final grade(s): _____ ; _____ ; _____

Total amount to be reimbursed: _____

MEMORIAL HEALTH SYSTEM

Educational Grant Summary

Memorial Health System's Educational Grant program provides the opportunity for both employees and external candidates to pursue additional education in exchange for a work commitment once the education is completed. Educational Grants are available to those pursuing health care careers that are deemed critical to the organization's present or projected staffing needs (i.e., Nursing, Radiology, etc.). Grant applications for all other careers will be reviewed on a case-by-case basis with a final determination to be made by the Chief People Officer. **If you have any further questions regarding the Educational Grant program, please contact an Employee Relations Specialist in the Human Resources Department by phone at (217) 788-3580.**

Requirements prior to application:

- Pre-requisite classes must be complete
- Must have acceptance into the selected program of study (a copy of acceptance letter must be provided)
- Must have a cumulative GPA of at least 2.50 on a 4.0 scale and must have attained no lower than a "B" average in core classes completed at the time of application.

Procedure to apply for a grant:

- The applicant submits a completed Educational Grant application packet (for external applicants an application for employment is also required) to the Human Resources Department
- In addition to the application, applicant must supply a copy of his/her acceptance letter into the program of study, his/her most recent transcripts, and verifiable documentation of the program tuition.
- At the time of application, applicant must provide a document outlining all core classes in the selected program of study and identify when each class will be taken.
- The Human Resources Department will conduct an initial screening interview after receiving the completed application
- After the interview, the application and all attachments will be reviewed for approval

Grants will be awarded at the following levels (the level of award is contingent upon the number of semesters the student has completed in the program of study):

- Technical courses, associate degrees, or BSN completion: Awards up to \$5,000 maximum
- A four-year baccalaureate degree or management development: Awards up to \$10,000 maximum
- Accelerated baccalaureate degrees: Awards up to \$15,000 maximum
- Postgraduate degrees or leadership development: Awards up to \$20,000 maximum
- High demand and high cost graduate/technical programs e.g. Certified Registered Nurse Anesthetist: Awards up to \$30,000 maximum

Grant recipients will agree to a work commitment with Memorial as a primary employer as follows:

- **Up to \$2,500 received = 1 year commitment to a full-time position (2080 hours of work)**
- **\$2,500 - \$5,000 received = 2 year commitment to a full-time position (4160 hours of work)**
- **\$5,000 - \$7,500 received = 3 year commitment to a full-time position (6240 hours of work)**
- **For each additional \$2,500 received, an additional year (2080 hours of service) is required up to a maximum of five years (10,400 hours of service)**
- **Evidence of successful completion of a degree/course of study must be provided to Human Resources within 30 days of receipt. The work commitment period will commence upon receipt.**

Requirements of a grant recipient:

- The grant recipient will sign a contract for the amount of the grant
- The grant recipient must maintain a minimum cumulative grade point average of 2.50 on a scale of 4.0 and must achieve no lower than a "B" average in core classes.
- The grant recipient must furnish grade reports to Human Resources each semester within one month of receipt

MEMORIAL HEALTH SYSTEM
Application for Educational Grant
(Current Employee)

Please complete this form and the remainder of the application. When complete, schedule a meeting with your manager to discuss your application. Your manager will complete page three and forward your completed application to the respective OMC Representative. If approved, the OMC Representative will forward to Human Resources. A representative from Human Resources will be in contact with you once all required information is received. Please contact an Employee Relations Specialist at 788-3580 if you have any questions.

**GENERAL
INFORMATION**

Last Name _____ First Name _____ Middle _____
Address _____
City _____ State _____ Zip _____
Home Phone Number _____ Work Phone Number _____
ID# _____ Department _____

Briefly describe your educational and career goals:

**EDUCATIONAL
OBJECTIVES**

Anticipated degree or course of study: _____

Name of school/program: _____

Length of program (in months): _____

Anticipated start date: _____

Anticipated completion date: _____

**FINANCIAL
REQUEST**

Explain the rationale for amount requested (i.e. tuition, fees, transportation):

Total Dollars Requested \$ _____

MEMORIAL HEALTH SYSTEM

Manager Recommendation for Educational Grant

(Current Employee)

Funding for the education of our employees is based primarily on the needs of the organization and the employee's educational and career goals. A work commitment to MHS is required at the conclusion of the employee's education.

Your role in this process is to evaluate your employee's educational and career goals as they relate to the needs of MHS. Please follow these steps:

- The employee will present you with a completed Educational Grant application
- Conduct a formal interview with the employee to assess the employee's ability to complete the educational goals as outlined by the employee on Pages 1 & 2
- Provide confidential, written feedback to questions listed below
- Once complete, forward the entire Educational Grant application to the respective OMC Representative. If approved, OMC Representative will forward to Human Resources
- If you should have any questions, please contact an Employee Relations Specialist at 788-3580

Employee Name:

1. Does the chosen coursework support the present and future business needs of Memorial Health System? If yes, please explain what business need(s):

2. Has the employee received at least 2.50 points on most recent performance appraisal? Yes No

3. Does the employee have a record of behavior that supports Memorial's Behavioral Standards and policies (If employee has active corrective actions on file, mark "No.")? Yes No

4. Do you recommend the employee for an Educational Grant? Yes No

5. Additional Comments:

6. **Please sign this form and forward, along with the employee's completed Educational Grant application, to OMC Representative. If approved, OMC Representative forward to Human Resources.**

Manager/Supervisor Signature

Date

OMC Representative Signature

Date

