

DIXON MONTESSORI CHARTER SCHOOL EDUCATIONAL ASSISTANCE POLICY

One of the fundamental tenants of the DMCS is to hire and retain qualified, educated teachers and staff. The educational philosophy of Dr. Maria Montessori encourages the education and support of life-long learners. Additional training, credentialing or certification stimulates creative thinking, offers new approaches and allows for increased teacher professionalism. All of these concepts benefit our students.

1.0 Policy

The Educational Assistance Policy provides eligible employees with the opportunity to obtain, maintain, or improve job related skills and competencies through participation in courses of study, conferences, workshops, classes, or seminars (herein referred to as course(s)) that directly relate to elementary school classroom instruction provided the Board of Directors has given prior approval.

The Board will consider the request for course(s) approval, along with the availability of funds when the request is first received. The Board will approve up to \$20K each fiscal year for all employee assistance requests.

2.0 Employee Eligibility

Educational assistance is available to teachers and staff, with satisfactory performance, who has been continuously employed for at least 6 months and continues to be employed, with satisfactory performance, during the duration of the course(s). If the employee is not a full time employee, any eligible expenses may be prorated based upon the percentage of time the employee is employed.

3.0 Course Eligibility

3.1 All approved course(s) must meet the following criteria:

- Must be in a specific job related field or professional discipline that directly relates to elementary school classroom instruction
- Must provide employee with skills, knowledge and competencies applicable for their current position or another position with DMCS
- Course(s) must be taken during non working hours unless prior approval is obtained from the Executive Director
- Participation in any course(s) may not in any way interfere with the employee's ability to perform his or her job
- Be approved by the Board of Directors prior to enrollment

3.2 Professional Certification, Undergraduate or Graduate Program

- Programs leading to professional certification or degree, including college units toward the completion of a bachelor, masters, PhD, California teacher credentialing program, or Montessori credential, must meet the criteria in section 3.1.
- Course(s) within the program that are unrelated to the employee's job may not be reimbursable even through the course(s) may lead to a degree that may be job related.
- The maximum tuition and fee reimbursement for professional certification programs is not to exceed a \$5,000.00 lifetime cap.
- If it is advantageous to DMCS the Board may approve full or partial advance payment to the educational institution on behalf of the employee. If this occurs, the employee will sign a promissory note agreeing to reimburse DMCS for the sums advanced. All sections of the Employee Assistance Policy are still applicable.
- Upon reimbursement of expenses the employee agrees to sign an agreement with DMCS agreeing to work at least one school year for every \$1,000.00 of reimbursement. In the event they fail to do so they will reimburse DMCS for the outstanding obligation within 60 days of termination.

3.3 Continuing Education or Academic Course(s) for Career Development

Individual undergraduate or graduate level course(s), conferences, workshops, or seminars taken as part of continuing education or career development should provide an employee with skills, knowledge and competencies which can be applied to and/or support specific career development plans. Each employee is eligible for \$400.00 each fiscal year.

4.0 Eligible Expenses

In order to be eligible for reimbursement, an employee must first obtain the Executive Director's approval for the course(s) prior to enrollment. The Executive Director must review and certify that the course(s) for which the employee is applying meets the specified criteria. Following certification by the Executive Director, the proposed course(s) must be approved in advance and in writing by the Board of Directors to be eligible for reimbursement.

4.1 For professional certification, an undergraduate or graduate program the employee is eligible for up to 90% of their tuition, text books and materials costs not to exceed the lifetime cap of \$5,000.00. Program reimbursement costs will be reimbursed only after successful completion of the course(s) with a final grade of "C" or equivalent, or higher.

4.2 Reimbursement for individual course(s), conferences, workshops, or seminars shall be made after the class is satisfactorily completed as verified by a certificate of successful completion or a passing grade report not to exceed \$400.00 each fiscal year.

4.3 The employee within 60 days of completion of the course(s) must submit a copy of the final grade, or certificate of completion; proof of payment; and written proof of course acceptance by the Board for reimbursement.

4.3 In the event of a layoff or termination due to job elimination, or school closure, or other business conditions the employee has no control, the employee maintains eligibility for reimbursement at the completion of the course(s), as long as the course began prior to the layoff or termination. If a professional certification, undergraduate or graduate program has been approved by the Board, the employee maintains eligibility for the program only through the end of the fiscal year in which the event occurred.

5.0 Expenses Not Covered

5.1 If the employee withdraws from the approved course(s); if the employee voluntarily terminates employment, or is terminated for cause, prior to completion of the course(s); if the employee fails to complete the course(s); if the employee is not performing satisfactorily at DMCS upon completion of the course(s).

5.2 If the employee receives duplicate or comparable fees from another institution or agency, grant, scholarship, or other financial aid, only the unpaid balance will be considered under this policy for reimbursement.

5.3 The employee does not receive advance approval from the Board of Directors.

5.4 The course(s) approved were not successfully completed within one year from the date the Board approved the request.

6.0 Tax Considerations

The taxability of payments under the Employee Assistance Policy is in accordance with Internal Revenue Service guidelines applicable at the time an employee applies for reimbursement of expenses. The payment of any taxes remains the responsibility of the employee.