

## Dixon Montessori Charter School Educational Assistance Policy

### 1. Purpose

- 1.1 One of the fundamental tenants of DMCS is to hire and retain qualified, educated teachers and staff. The education philosophy of Dr. Maria Montessori encourages the education and support of life-long learners. Additional training, credentialing, or certifications stimulates creative thinking, offers new approaches, and allows for increased teacher professionalism. All of these concepts benefit our students.
- 1.2 The goals of the DMCS Educational Assistance Policy are to enhance the Montessori and PBL programs, retain skilled and motivated educators, and address areas of need.
- 1.3 This policy seeks to structure Educational Assistance at DMCS so that such assistance supports the Charter, meets the needs of the school, and provides all eligible staff a fair opportunity to be considered for assistance.

### 2. Administration Responsibilities

- 2.1 Annually, the Executive Director or Designee shall review school needs and current staffing in order to determine what areas of need could be addressed through the approval of a course of study supported by Educational Assistance.
  - 2.1.1 The areas of need shall include:
    - AMS Montessori Credentialing
    - PBL Training, such as from the Buck Institute for Education
    - Any additional needs, as identified annually
- 2.2 The Executive Director, or Designee, shall establish and adhere to a timeline for applications, selection, and approval of Educational Assistance.
  - 2.2.1 The Timelines shall include:
    - Notification to all teachers and staff of the areas of need and a call for applications of proposed courses of study
    - An initial deadline for applications to be submitted to the Executive Director or Designee
    - An initial deadline for review and selection by the Executive Director
    - An initial deadline for presentation to the Board of Directors for consideration for approval
  - 2.2.2 The Timelines may include:
    - Any subsequent application periods for secondary consideration
    - Any additional dates, as determined by the Executive Director or Designee

2.3 The Executive Director shall establish Educational Assistance Procedures. These procedures shall include:

- 2.3.1 The identified areas of need
- 2.3.2 The timeline for application, selection, and approval of Educational Assistance.
- 2.3.3 The selection criteria to be used in determining which applications for Educational Assistance shall be approved or recommended to the Board of Directors for Approval
- 2.3.4 Tracking of satisfactory completion or progress in approved programs
- 2.3.5 Eligibility for continued payment or reimbursement of expenses
- 2.3.6 Tracking of Education Assistance expenses

2.4 The Executive Director shall approve or recommend Professional Development that meets the needs of the school, can benefit the largest possible number of students, and can be shared so as to benefit the largest number of staff members.

### 3. Employee Eligibility and Responsibilities

3.1 Educational assistance is available to a teacher and staff member, 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).

- 3.1.1 With the approval of the Executive Director, employees who have not been employed for at least 6 months may apply for Educational Assistance, so long as the requested program meets an identified area of need for DMCS.

3.2 Employees approved for Educational Assistance to enroll in a Program shall sign an agreement with DMCS to work at least one school year for every \$1,000.00 of expenses paid for the program or to reimburse DMCS for the outstanding obligation within 60 days of termination.

### 4. Professional Development and Program Eligibility

4.1 Professional Development may include Courses, Conference, Training, Workshops, or Conferences.

4.2 Programs may include a program of study toward the completion of a bachelor, master, PhD, California teacher credentialing program, Montessori credential, or PBL certificate.

4.3 In order to be approved, Professional Development and Programs 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

- Must be taken during non-working hours, unless prior approval is obtained from the Executive Director
- Participation in any course may not, in any way, interfere with the employee's ability to perform his or her job

4.4 In order to be approved, Programs must meet the following criteria

- Any Program of study shall meet the criteria in section 4.3.
- Any course(s) within the program that do not meet the criteria established in 4.3 are not eligible for Educational Assistance.

## 5. Approval of Educational Assistance

5.1 All Educational Assistance must be approved before eligible expenses may be paid or reimbursed. Employees who enroll in courses or programs prior to renewal are not guaranteed approval or reimbursement.

5.2 The Executive Director may approve expenditures for employees to complete Professional Development. The total of such expenditures shall not exceed the amount approved for Conference and Travel in the annual budget. . Such expenditures shall be included in the annual budget and expended within the fiscal year.

5.3 The Board of Directors may approve up to \$20,000 in total educational assistance per fiscal year for employees to enroll in Programs. All expenditures for the Program need not be exhausted within the fiscal year.

5.3.1 The Board of Directors shall only approve Programs recommended by the Executive Director.

5.3.2 There shall be a lifetime cap of \$5,000.00 per employee for Education Assistance to enroll in Programs.

5.4 Approval of any Educational Assistance shall be made in writing. Approval shall be provided to the employee and stored in the employee's file.

## 6. Eligible Expenses

6.1 DMCS may reimburse or pay up to 90% or the \$5,000.00 lifetime cap of the total expenses for tuition, text books, and/or material for an approved Program. Lodging, food, and travel will not be reimbursed for Programs.

6.2 DMCS may reimburse or pay up to 100% for the total expenses for tuition, text books, materials, lodging, food, and/or travel for an approved Professional Development event.

6.3 In the event of a layoff or termination due to job elimination, school closure, or other business conditions beyond the control of the employee, the employee retain eligibility for reimbursement, so long as the Professional Development or Program began prior to the layoff or termination.

## 7. Expenses Not Covered

- 7.1 DMCS shall not pay or reimburse expenses for employees who voluntarily terminates employment or who are terminated for cause.
- 7.2 DMCS shall not pay or reimburse expenses for Programs or Professional Development from which the employee withdraws, fails to complete the course or program, or fails to complete the course or program satisfactorily.
- 7.3 If the employee receives duplicate or comparable fees from another institution, agency, grant, scholarship, or other financial aid, only the unpaid balance will be considered for payment or reimbursement.
- 7.4 Expenses for professional development and programs not approved in writing shall not be reimbursed.

8. Tax Considerations

- 8.1 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.

DMCS Board Adoption Date: October 23, 2018