

EDUCATION FINANCIAL INCENTIVE PROGRAM REQUEST FOR REIMBURSEMENT



INSTRUCTIONS

- Please read Education Financial Incentive Program Eligibility Requirements for complete rules and procedures before completing this form.
- You must submit and receive approval from the Education Financial Incentive Program Committee for the course *before* course registration, to ensure course is eligible for reimbursement.
- You must attach a brief description of your course and why you feel it qualifies for reimbursement. This will enhance the Education Financial Incentive Program Committee’s understanding of the eligibility of your selected courses/training.
- Complete this form and send with any attachments to the Education Financial Incentive Committee, c/o PSEA, 12265 World Trade Dr. Suite E, San Diego, CA 92128, on or before the posted submission deadline. You may use either U.S. Mail or Inter-District mail or the documents can be scanned and submitted to melanierodriguez@powaysea.org.
- Reimbursement (up to \$500) will be made upon receipt of documentation showing completion of the course(s) with a grade of “C” or better, and receipt(s) documenting payment of tuition or fees.

| | | |
|---------------------------------|--------------------------|-------------------------|
| Employee Name (Last, First, MI) | Department/Site Location | Extension |
| Job Title | Email Address | |
| Supervisor Name | Supervisor Extension | Alternate Email Address |

Employee Eligibility (please **✓** all that apply)

| | |
|--------------------------|--|
| <input type="checkbox"/> | I am a member of the Poway School Employees Association (PSEA) bargaining unit I or II |
| <input type="checkbox"/> | I have passed my probationary period and am a permanent employee of PUSD |
| <input type="checkbox"/> | I have a current overall “Satisfactory” review rating on my most recent Work Performance Review or have attached letter from supervisor approving course/training. |

Course Information (✓ appropriate boxes and fill in blanks)

| | | | | | | | | | | |
|------------------------------|--------------------------|--------------|--------------------------|---------------------------|--------------------------|-------|--------------------------|--------------------------|---------|--------------------------|
| Fall | <input type="checkbox"/> | Spring | <input type="checkbox"/> | Summer | <input type="checkbox"/> | Other | <input type="checkbox"/> | Please explain: | | |
| Institution offering course: | | | | | | | Via TV | <input type="checkbox"/> | Via Web | <input type="checkbox"/> |
| | Course No. | Course Title | Units/Credits | Class/training Start Date | Course Fees | | | | | |
| 1 | | | | | | | | | | |
| 2 | | | | | | | | | | |
| 3 | | | | | | | | | | |

Course Eligibility (please **✓** all that apply)

| | |
|--------------------------|---|
| <input type="checkbox"/> | Course(s) will enhance my ability to perform in my current position. |
| <input type="checkbox"/> | Course(s) will increase my ability to assume a position of increased responsibility or technical knowledge in the District. |
| <input type="checkbox"/> | Funding will not be used for on-going formal types of higher education. |
| <input type="checkbox"/> | Attached is a brief description of your course and why you feel it qualifies for reimbursement. |

I have read the Education Financial Incentive Program Eligibility Requirements and understand its terms and my responsibilities.

Employee Signature Date

I certify that there is no work shift conflict from this employee’s attendance in the above professional learning opportunity(ies). (Supervisor signature is required only if time away from contracted work hours is requested.)

Supervisor Signature Date

| | | | | | | | | |
|---------------------|------------------------------------|----------|--------------|--|------|------------|------------|-----|
| FOR OFFICE USE ONLY | AMOUNT | FUND-SUB | RESOURCE-SUB | GOAL | FUNC | OBJECT-SUB | SCH | LOC |
| | \$ | | | | | | | |
| | Documentation Received Date: _____ | | | Financial Incentive Committee Approval _____ | | | Date _____ | |

Poway Unified School District
Education Financial Incentive Program for Classified Employees
Eligibility Requirements

Financial incentive support is available to all non-management classified employees who meet the guidelines listed below. This program is designed to promote and encourage classified professional development opportunities that fall both within and outside the employee's regular workday. A District Education Financial Incentive Program Committee (Committee) has been established to oversee the application process.

Eligibility

All non-management classified employees requesting financial incentive support for staff development opportunities must meet the following criteria:

1. Must be an active classified employee of the District and member of the Poway School Employees Association bargaining unit
2. Must have non-probationary employee status.
3. Must have a current overall "Satisfactory" review rating on most recent Work Performance Review. If review rating is not "Satisfactory," then employee must attach a letter of approval from supervisor.
4. Supervisor approval is necessary only if time from regular contracted work schedule is requested to attend a staff development opportunity. (Interested staff may submit their request for consideration to both the Committee and their Supervisor simultaneously for consideration.) If there is not a work shift conflict in attending an approved staff development opportunity, the employee need only communicate his/her participation to, not request permission from, his/her immediate supervisor.

Eligible Courses, Training and "Other" Opportunities

Employees may request a scholarship-type of reimbursement stipend, either full or partial, for on-going eligible professional staff development opportunities, courses, and/or training conducted by a recognized institution/organization offering instruction that will benefit the employee and the District. The following criteria will be used by the Committee to determine the point value of the applicant's request:

1. Classes, courses, workshops or "other" types of programs that will enhance the individual employee's ability to perform in his/her current position. This does not include classes, courses, workshops or "other" types of programs required to maintain certification or licensing in his/her current position. CLCs are not part of this program and do not require this application.
2. Information and instruction that will increase the individual's ability to assume a position of increased responsibility or technical knowledge in the District.
3. Funding may not be used for on-going formal higher education unless the coursework directly supports employee's current position.
4. Funding may be used for tuition fees and books required for the approved courses/training.
5. An employee may apply for amounts up to \$500 per fiscal year. This amount may be reduced due to funding availability.
6. Qualified employees must submit dated, itemized receipts for all approved expenses for reimbursement after completion of courses/training.
7. Qualified employees must submit a certificate of satisfactory completion or a letter grade of "C" or better, in order to be reimbursed.

Approval Process

An employee must submit a request for financial incentive support on District form LSS-21, *Education Financial Incentive Program Request for Reimbursement*, to the Committee **prior** to the class, course, workshop or “other” type of program. Requests submitted for course/training that occurred **prior to the current fiscal school year** will not be considered.

In advance of each school year, the Committee will establish submission deadlines for requests to be reviewed and considered. Every effort will be made to notify the employee of the status of the request in sufficient time for the employee to participate in the professional staff development opportunity. An employee is responsible for submitting his/her requests timely prior to any of the published submission deadlines for review and consideration. All requests received after the deadline will be held for consideration until the next scheduled submission deadline.

| Submission Deadlines for 2024-2025 Fiscal Year | | |
|--|------------------|--------------|
| September 19, 2024 | January 23, 2025 | May 15, 2025 |

The decision to reimburse in full or in part will be made by the Committee. All financial incentive support to classified employees for professional staff development opportunities are subject to the annual budget appropriations approved by the Board of Trustees. Financial incentive support will be disbursed until the funds are depleted. Currently, the available budget for this program is \$10,000.00. Employees desiring financial incentive support are encouraged to submit their requests early in the fiscal year to increase possibility of reimbursement.

Since budgeted funds are limited for the District’s Education Financial Incentive Program, a rating system will be established with a scale of one (1) to three (3) in order to merit priority of the application. The rating system is as follows:

- **Employee Eligibility** (4 criteria outlined for employee eligibility. If all 4 are met, then employee is eligible and is scored one (1) point.)
- **Course/Workshop Eligibility** (7 criteria outlined for course/workshop eligibility. If all 7 are met, then course/workshop is eligible and is scored one (1) point.)
- **Timeliness of Submission** (All applications will be date/time stamped and, if received by the designated cut-off date, application is considered eligible and will be scored one (1) point.)

District Education Financial Incentive Program Committee

The District’s Professional Staff Development Financial Incentive Committee will be comprised of five (5) District employees from the following areas:

- Two (2) members from District Administration
- Three (3) members Poway School Employees Association

The Education Financial Incentive Program Committee will review all employee requests for financial and/or scholarship support for classified staff development. The Committee will establish and post submission deadline dates for each calendar year. Three (3) members of the Financial Incentive Committee constitute a quorum; awards will be decided by simple majority of the quorum.

Decisions made by the Financial Incentive Committee are final and not subject to appeal.