

Education Reimbursement Benefit Program (“Program”)

Overview: The Diocese of Winona-Rochester encourages employees to further their knowledge so they meet their own career goals, while at the same time, put that knowledge to work for the diocese. Typically regular, full-time employees with 1 year of full-time service with the diocese are eligible for reimbursement for up to a maximum of two classes per academic semester as long as the employee achieves a minimum of a “C” (reimbursed at 50%) or “A” or “B” (reimbursed at 75%) grade. Other details of the Program include:

- Typically, this Program covers undergraduate “for credit” courses of at least 2 weeks in duration which are work related and applicable to the employee’s current role, or a role that the employee would reasonably move into in the near future. (**Note:** Employees seeking to attend “non-credit” course/seminars that are of a short duration should seek approval through their direct supervisor. These costs would be considered “training” under each department’s individual budget)
- Request for reimbursement is to be submitted via the **Application for Education Reimbursement** form with approval from the employee’s direct supervisor before the class is taken. In addition, copies of the request must also be sent to the Director of Human Resources and the Chief Finance & Administrative Officer for review and approval.
- If all guidelines and approvals are received, the Diocese of Winona-Rochester agrees to refund the cost of applicable tuition, fees and books consistent with the reimbursement schedule and budgetary parameters. While the employee can choose any institution for attendance, the diocese reserves the right to use tuition rates consistent with local public institutions as a guideline for reimbursement. In addition if funds are limited, the diocese reserves the right to reimburse employees that have not participated in the Program in the past.
- No refund will be given to an employee who submits a notice of employment resignation prior to submitting the documents necessary to prove satisfactory completion of a course. In addition, an employee voluntarily terminating employment within two years of completion of reimbursed class or classes will be required to reimburse the diocese via payroll deduction.
- Employees may request an “advance” of the reimbursement in order to pay for tuition, fees, books, etc. Their signature authorizes the Diocese of Winona-Rochester to deduct the advanced money from their paycheck if the employee fails to submit the appropriate documentation of successful completion or upon voluntary termination of employment from the Pastoral Center.

Administration: The Office of Human Resources in consultation with the Chief Finance & Administrative Officer shall administer this Program. The Program is subject to yearly budgetary constraints, can be suspended or discontinued at any time, and depending upon current IRS tax regulations, reimbursements may be considered taxable income to the affected employee. Employees participating in this program will be required to sign this policy document. Their signature acknowledges receiving the policy and authorizes the Diocese of Winona-Rochester to make payroll deductions as illustrated in this policy.

Employee Name (Please Print)

Employee Signature

Date

Application for Education Reimbursement

(Diocese of Winona-Rochester)

To apply: Complete the Application Form, obtain approval from your department manager and submit to the Office of Human Resources for review and approval.

The approval process: The Director of Human Resources is accountable for the management of the Educational Reimbursement Benefit Program budget. Addition approvals are also required by the Chief Finance and Administration Officer.

Approved courses: The courses must be related to your present position or one which the employee could attain in the near future. The course must be offered by an accredited institution of high learning. Graduate (Master's, Doctorate, etc.) level courses are not eligible for this program.

Satisfactory evidence of course completion includes: Receipts of payments made for tuition, books, affiliated fee's etc. along with a copy of your grade (C or better)

Employee Name _____ Position _____ Dept. _____

Course Title _____ Credits _____

Description of Course _____

Institution Offering Course _____ Dates _____

Estimated Tuition, Books, Fee's, etc. _____ (*Attach breakdown*)

Reason for Taking Course (must be work related; not "to obtain a degree")

Are you receiving reimbursement from any other source? _____ Yes _____ No
(i.e., GI Bill, State or Federal Aid, etc.)

I understand that it is necessary for me to furnish adequate evidence of the payment of costs of this course and to furnish evidence of the satisfactory completion of the course in order to qualify for the appropriate refund (i.e. 75% for "A" or "B" or 50% for "C"). Eligibility for reimbursement terminates if I should voluntarily resign my employment with the diocese before submitting all documents required to prove satisfactory completion of the course. Employee's voluntarily resigning employment within two years of reimbursement are required to reimburse the diocese via payroll deduction or by personal check if preferred. Employee's signature below authorizes the payroll deduction.

Employee Signature _____ Date _____

Approvals (Initial)

Dept. Head/ _____ Date _____ | Dir. HR/ _____ Date _____ | CFAO/ _____ Date _____

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