1. Policy Statement

Facilities Planning and Management (FP&M) encourages its employees to pursue educational advancement leading to professional, undergraduate and graduate level degrees or certifications and may authorize payment for coursework or trainings when budget is available. In order to ensure budgeted funds are not exceeded, proper authorization must be obtained prior to beginning the coursework or training.

Employees must be employed with FP&M one year prior to submitting a request.

Reimbursements are not to exceed 18 credits per calendar year for all eligible employment categories.

Staff may be reimbursed for up to 100% of tuition and segregated fees, not exceeding UW-Madison tuition equivalent per Office of the Registrar Tuition Rates (https://registrar.wisc.edu/tuition_&_fees.htm) upon successful completion of the course at the discretion of the Associate Vice Chancellor (AVC) for FP&M. Any grants, scholarships or awards received by the student toward a course are not eligible for reimbursement.

All requests must conform to UW-Madison policies on tuition reimbursement. More information about the campus policies can be found at:

- Employee Coursework and Training Assistance
  http://www.ohr.wisc.edu/docs/EmployeeCourseworkTrainingProcedures.pdf
- Support for Employee Learning and Development
  https://kb.wisc.edu/ohr/policies/page.php?id=53476

2. Purpose

Support the acquisition of skills and knowledge to assist with career development and advancement for employees.

3. Definitions

Career-related coursework: is considered to be undergraduate or graduate level courses as well as other professional development courses that will qualify an employee for development within their current position or preparatory for career/professional job advancement. Doctorate coursework qualifies as well, but the reimbursement rate is calculated based on UW-Madison graduate level course rate. The employee will attend the approved course or training on his/her own time, use approved paid leave, or adjust his/her work schedule with the approval of the supervisor consistent with UW policy.

Employer-Directed/Required Training or Coursework: is a training or course that the supervisor requires an employee to complete as part of their employment duties. This type of training is fully funded by FP&M and is typically taken on work time. This type of training is generally not taken for credit and does not fulfill requirements toward a degree.
FP&M Directors: The six department directors from Campus Planning & Landscape Architecture; Capital Planning & Development; Environment, Health & Safety; Physical Plant; Space Management; and, Transportation Services.

Deputy: Position reporting to the AVC for FP&M who acts on behalf of the AVC as directed.

4. Scope

This policy applies to all FP&M employees that hold a 50% or greater FTE position.

Excludes:
- Term Employees
- Student Help
- Less than 50% FTE position

This policy does not apply to Employer-Directed/Required Training or Coursework.

5. Procedures

- Employee must complete one Reimbursement Request for Career-Related Coursework or Training form for each course requested. Employee should include a brief statement of why they want to take the course and how it relates to their overall career development. All supporting documentation must be included with the form and submitted to the supervisor for approval. The form must be submitted to the supervisor and a copy forwarded to the Department Director prior to the start of the coursework or training.
- If approved, the completed, signed form is submitted to the FP&M Department Director, or Deputy AVC for employees within the Office of the AVC, for review to determine that the course is career-related and that departmental funding is available. The Director approves or denies the request.
- If approved, the director forwards the request to the Deputy AVC.
- Final division-level approval rests with the AVC or Deputy AVC.
- If approved, the form is sent to FP&M Human Resources (HR) and forwarded to the UW-Madison Office of Human Resources (OHR) for final approval.
- Once the employee receives final approval from OHR, they may register for the course.
- If the request is denied, in part or in full, at any step through the process, the employee’s supervisor and/or FP&M HR will provide written documentation to the employee with the reason for the decision.
- Books, supplies, travel costs and other fees are not reimbursable expenses.
- Following successful completion of the course (earning a grade of C or greater), the employee requests reimbursement through the e-reimbursement system, using the “Other Non-Travel” expense type. The approved Reimbursement Request for Career-Related Coursework or Training form, proof of successful completion (a grade report of C or greater) and a receipt for tuition payment must be included when the expense report is submitted.
In order to receive reimbursement, the employee must be an employee in good standing through the duration of the academic period in which the course was taken.

Approved requests are valid only for the academic term/semester specified in the original request. If for any reason the employee is unable to take/complete the course during that time frame, a new request must be submitted to pursue reimbursement at a later date.

FP&M leadership is committed to the broadest distribution of available funding. For that reason, a percentage distribution formula may need to be used if requests exceed available funds.

Criteria to be used in reviewing individual requests may include, but may not be limited to, the number of previous courses paid for by FP&M, application to current position, work performance, length of service, and overall equity of funds distribution.

**NOTE:** Employees may submit requests at any time; however, due to limited fund availability FP&M has established three priority deadlines for tuition reimbursement requests. The deadlines are as follows:

- Fall semester requests – July 10th
- Spring semester requests – December 1st
- Summer semester requests – May 1st

All employees requesting funds according to the above schedule will receive a response no later than 30 days following the deadlines noted above and will typically receive priority over requests that are not received by the above deadlines. The approval process can be lengthy. Employees are advised to submit the completed **Reimbursement Request for Career-Related Coursework or Training** according to the above deadline or, at minimum, well in advance of coursework or training.

**Failure to Comply:**
The tuition and fees paid by the employee will not be reimbursed.

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**6. References**

UW Madison Policies and Procedures: [Employee Coursework and Training Assistance](http://www.ohr.wisc.edu/docs/EmployeeCourseworkTrainingProcedures.pdf)

UW Madison Policies and Procedures: [Support for Employee Learning and Development](https://kb.wisc.edu/ohr/policies/page.php?id=53476)

Form: [Reimbursement Request for Career-Related Coursework or Training](http://www.ohr.wisc.edu/docs/EmployeeCourseworkTrainingRequestForm.pdf)
7. Approvals and Revisions
Approved on December 12, 2014 by Associate Vice Chancellor, William M. Elvey, P.E.

Signature ___________________________ Date: 4.25.16

8. Contacts

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<tr>
<td>Subject Matter</td>
<td>Training Director</td>
<td>608-262-8419</td>
<td><a href="mailto:shoko.miyagi@wisc.edu">shoko.miyagi@wisc.edu</a></td>
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