Educational and Tuition Assistance Program Guidelines

The mission of the YMCA of Greater Boston is to improve the health of mind, body and spirit of individuals and families in our communities. Our Association is strongly committed to promoting economic independence and better futures for both the people we serve and our staff. As such, the YGB recognizes the importance of employee educational growth to maintain and advance professional, technical, and managerial competence, and to prepare employees for promotion or career change opportunities within the YMCA. The YMCA believes in encouraging employees to improve their professional knowledge and skills, which is a benefit to both the employee and the Association.

The Educational and Tuition Assistance Program is to be used to support educational classes directly related to an employees work currently performed at the YMCA.

1. Educational Assistance Administration

   A. The Educational and Tuition Assistance Program is administered strictly through the Human Resources Department (HR). An application form should be submitted to the Executive Director and then HR for final approval and processing (see Appendix A).

   B. All decisions regarding eligible courses and appeals, as defined below, will be reviewed and determined by the Executive Director and human resources.

   C. Once approved, the applicant will receive a confirmation from Human Resources.

   D. Payment will be made out to the school, not to the employee. A check request initiated by HR needs to be submitted to the Finance department once the application is approved by both the Executive Director and HR. Checks will be mailed directly to the school within two weeks of receipt of final paperwork.

   E. The employee will be responsible for the remainder of the tuition charges including all miscellaneous fees.

2. Staff Eligibility
A. Eligible employees must be full time (37.5 hours per week or 1,875 hours per year) and have at least one year of active service at the time of application submission.

B. Each eligible employee must currently be active and in good standing in order to get reimbursed. The Executive Director and HR will determine if the employee is in good standing by reviewing the employees past 12 months performance, attendance and overall attitude in the workplace.

C. Eligible staff may receive Educational and Tuition Assistance once per semester depending on availability of funds.
   i. Educational and Tuition Assistance will be distributed on a first-come, first-serve basis at the start of the calendar year.
   ii. If funding remains available for Educational and Tuition Assistance in the Winter/Spring semesters, those who did not receive assistance the first semester will be given priority on a first-come, first-serve basis. There will be a deadline for interested staff meeting this criterion, after which, the funds may also be distributed to those who already received Educational and Tuition Assistance earlier in the fiscal year.

3. Benefit Level

A. The YMCA will contribute up to 50% of tuition to a maximum of $2,000 per annum (or $6,000 per 3 year period).

B. No employee “match” is required. However, employees will be responsible for covering the remainder of the course over the amount paid by the Association. All miscellaneous fees including registration, textbooks and supplies are not eligible for assistance.

2. Proof of Completion

A. Employees receiving Educational and Tuition Assistance are required to submit proof of successful completion of program (must receive an A, B, or Pass) in order to remain eligible to receive assistance in future semesters or years.

B. If an employee does not submit proof of successful completion (or does not have documentation as to a legitimate reason for not completing course such as medical documentation), that employee becomes ineligible for Educational and Tuition Assistance for 6 months and is required to file an “appeal” to become eligible again (Appeal Form in Appendix B). In this appeal, the employee should state the reason for the unsuccessful completion and plans to address these issues in order to be successful in the future. The association reserves the right to recoup the tuition assistance through a payroll deduction should the employee not provide successful completion.
C. If an employee has received Educational and Tuition Assistance twice and has not completed a course successfully either time, the employee is ineligible for future assistance.

D. If an employee drops a course before the withdrawal deadline and receives a refund or partial refund, the refunded money must be returned to THE YMCA OF GREATER BOSTON in order for the employee to remain in good standing and eligible for future assistance.

3. Qualified Courses

A. Educational and Tuition Assistance should be granted for any of the following:

1. Any credit course in an accredited educational institution that leads to a degree or certificate that is directly related to an employee’s work currently performed at the YMCA.

2. Any non-credit or continuing education course in an accredited institution that improves an employee’s skills, furthers career goals, and/or may lead to career advancement related to an employee’s work currently performed at the YMCA.

3. Any class providing adult basic education, remedial education in preparation for post-secondary education, or ESOL class regardless of the type of institution offering the program.

4. Other

A. There is no requirement that an employee continue their employment at the YMCA for a specified period of time after receiving Educational and Tuition Assistance.

B. Employees are expected to take classes or complete coursework on their own time (not on company paid time). It may be possible to introduce some flexible hours in the employee’s work schedule to accommodate their classes. This is subject to approval of the employee’s supervisor and the Executive Director, provided that it does not interfere with the work of the branch and the department.

C. Employees who receive Educational and Tuition Assistance may be asked to “give back” to the YMCA by:

1. Sharing their experiences of returning to school with other employees.
2. Sharing their experiences regarding specific courses/areas of study with other employees.
3. Sharing knowledge learned in courses with other employees.
# Application for Educational and Tuition Assistance

<table>
<thead>
<tr>
<th>Employee Name:</th>
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<tbody>
<tr>
<td>Department &amp; Branch:</td>
<td></td>
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<tr>
<td>Supervisor’s Name:</td>
<td></td>
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<tr>
<td>Branch Executive/ Department Vice President:</td>
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## Course Information

<table>
<thead>
<tr>
<th>Course title:</th>
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<tbody>
<tr>
<td>School Institution Name (put full school address and URL):</td>
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</tr>
<tr>
<td>Are you taking the course at an accredited institution:</td>
<td>YES / NO (Circle One)</td>
</tr>
<tr>
<td>Length of course:</td>
<td></td>
</tr>
<tr>
<td>Tuition Cost (minus additional expenses):</td>
<td></td>
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<tr>
<td>Start and end dates</td>
<td></td>
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<tr>
<td>Type/Name of course you want to take:</td>
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*Please provide a paragraph on why this course benefits you:

*Why this course benefits the YMCA:*

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<thead>
<tr>
<th>Employee Signature:</th>
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<tbody>
<tr>
<td>Branch Executive* Signature:</td>
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<td>HR Signature:</td>
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<td>Date the request was submitted:</td>
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*If student is a Branch Executive then District VP or SVP Ops signature is required.

Updated November 18, 2013
APPENDIX B: THE YMCA OF GREATER BOSTON EDUCATIONAL and TUITION ASSISTANCE APPEAL FORM

Date: _____________________

Employee Name: ___________________________________________________________

Position/Department: _________________________________________________________

☐ I am unable to submit proof of successful completion of this semester’s course but I am requesting that I be allowed to participate in the Educational and Tuition Assistance Program in the future.

Please describe the reason(s) that you were unable to complete the course successfully.

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Please describe what steps you will take to address these identified issue(s) in the future and/or any plans you have made to enable you to complete future courses successfully.

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Requested By: _____________________ Date: ____________________

Approved By: _____________________ Date: ____________________