

The University of Wisconsin System
UPS OPERATIONAL POLICY: GEN 23



SUBJECT: Job-Related Coursework and Training

Original Issuance Date: July 1, 2015

Last Revision Date:

1. POLICY PURPOSE:

The purpose of this policy is to outline job-related coursework and training procedures that support the University of Wisconsin System in its goal to promote the continuing education of employees and reimburse employees for authorized education and training.

2. POLICY BACKGROUND:

[Regent Resolution 1386](#) (adopted 2/11/1977) and [Financial Administration G25: Educational Assistance for Faculty and Staff](#) outline the procedures relating to eligibility and reimbursement for education and training. Additionally, [Unclassified Personnel Guideline # 8](#), [Wis. Stat. § 230.046](#), and various collective bargaining agreements also provided guidance in the area of job-related coursework and training.

Effective July 1, 2015, this policy applies to all UW System employees.

3. POLICY DEFINITIONS:

Please see UPS Operational Policy [GEN 0: General Terms and Definitions](#) for a list of general terms and definitions.

Definitions specific to this policy:

“Qualifying education or training” means coursework or training which enhances skills or provides knowledge that will improve an employee’s job performance; are mandated by law or regulation in order for the employee to retain the job; are directly related to the employee’s current profession; or provide for career development. Courses for personal enrichment do not fit this definition.

4. POLICY:

It is the policy of the University of Wisconsin System to promote continuing education of employees to improve employee job performance. Employees may be reimbursed for authorized education and training within the constraints of Internal Revenue Code Section 127, the Wisconsin Department of Revenue Tax Regulations, and budget constraints.

Job-related course work and training is accomplished through two means:

- The provision of job-related educational assistance in the form of tuition reimbursement;
 - The provision or promotion of training programs related to employee responsibilities.
- A. Tuition reimbursement for job-related coursework and training is available to employees who hold a half-time or greater appointment. Temporary employees, employees-in-training, and student assistant employee categories are not eligible.
1. Institutions are encouraged to establish a mechanism that ensures equitable distribution of opportunity for educational assistance.
 2. Management's decision to authorize educational assistance should be based on the determination that successful completion of the qualifying education or training will be beneficial to both the University and the employee in terms of increased knowledge, abilities, and skills. A job-related coursework or training form must be completed and approved in advance of the beginning of such coursework or training. [Financial Administration G25: Educational Assistance for Faculty and Staff](#) further outlines the policy and process for educational assistance. Assistance may be denied in cases where management determines that neither the course nor the degree pursued is of sufficient benefit to the University, or where management determines there is a lack of funding available.
 3. Course work may be taken at any accredited public or private higher educational institution or Wisconsin Technical College System district institution. Course work at a UW System institution is encouraged. Reimbursement for course work taken at private institutions should be limited to the rate of an equivalent course at the home institution.
 4. Normally, coursework is taken on an employee's own time. If the employer determines that the needed course work is available only during the employee's scheduled hours of service, a program of proportional compensatory time may be arranged, provided normal services of the employing department are not disrupted or impaired.
 5. Normally, no more than one course (up to five credits) or its training equivalent in any academic term (e.g., a semester, summer session, or an equivalent) should be reimbursed. Additional course work may be authorized by the chancellor or designee.
 6. For authorized coursework or training (see Section 4B #2 for employer directed training), institutions will reimburse the employee for basic instructional fee/tuition charges, but not book and supply costs, upon successful completion of the course/training.
 7. This program shall not be used as a form of compensation for any employee.
 8. This policy does not apply to attendance at periodic professional meetings and conferences where state and UWS travel guidelines presently accommodate employee travel and registration expenses. To qualify as reimbursable coursework or training, the activity must result in a 'grade' or other formal certification of completion or accomplishment. Most professional 'meetings' and 'conferences' are informational and

do not lead to a grade or certification nor are they characterized as ‘coursework’ or ‘training’ generally.

B. Training opportunities available through either UW-sponsored or outside programs will be promoted as a means of developing skills, knowledge, and abilities which will enable employees to establish and maintain a high level of job performance. Depending on the employee’s position and/or job responsibilities, certain training may be mandated.

1. Supervisor training. Each UW institution shall establish a supervisor development program. The program should include elements such as:

- a. UPS personnel policies;
- b. Grievance handling;
- c. Discipline;
- d. Performance management;
- e. Development of an inclusive work environment; and
- f. Development of leadership skills.

2. Where the employer has directed training deemed essential to the continued effectiveness of an employee, that training may occur during scheduled working hours of the employee and should be paid for directly by the employer.

3. Each UW institution is encouraged to maintain records of employee participation in training programs.

5. RELATED DOCUMENTS:

[Regent Resolution 1386](#) (adopted 2/11/1977) (formerly Regent Policy Document 20-4)

6. POLICY HISTORY:

Regent Policy Document [20-4: Tuition Reimbursement to Unclassified Staff Members](#)
Unclassified Personnel Guideline [#8: Employee Performance Improvement: Procedures for Implementing Regent Policy on Authorized Job-Related Coursework and Training.](#)

Reviewed by the Board of Regents, April 10, 2015