

Standing Operating Procedure #1048

Title: Quality Workforce for Oklahoma's Heroes

Summary of Policy

These procedures provide the policy to implement an education and training program for employees. The procedures ensure compliance with the Quality Workforce for Oklahoma's Heroes Act - Title 74 O.S. § 1735.1 and Title 72 O.S. § 63.10.

Procedure:

Section 1. Definitions

Benefit. As described within this Standing Operating Procedure (SOP), employees of the Oklahoma Department of Veterans Affairs have the opportunity to participate in an education and training program which can pay for a portion of their tuition and fee expenses. It is important that employees seeking to participate in the benefit program closely review and adhere to the policies and procedures outlined within this SOP.

Education Review Committee. This team is responsible for oversight of the education and training program, including reviewing applications, monitoring academic performance, and evaluating compliance with rules and procedures. The Education Review Committee will meet on an ad hoc basis and provide recommendation to the Executive Director. The Committee will include the Deputy Director, the State Home Programs Administrator, and the Education and Training Administrator. Other members will be included as determined by the Executive Director.

Eligible Institutions. Training is only permitted in education or training programs offered at Oklahoma public schools and institutions accredited by a regional or national accrediting agency recognized by the U.S. Department of Education, or industry recognized licensure and certification organizations.

Maximum Benefit. An individual is limited to total education and training benefits of \$5,250.00 in any one calendar year. Per IRS regulations the calendar year is determined by the payment date of the benefit.

Types of Training.

Education benefits will apply only:

1. To coursework providing an opportunity for furthering the employee's education which will improve skills directly applicable to job responsibilities and approved by the Executive Director (or designee) prior to enrollment.
2. To coursework providing an opportunity for furthering the employee's education that is directly related to classifications that are offered at ODVA.

Note: Assistance will not be approved where the Education Review Committee has determined that neither the academic degree nor the courses are of benefit to ODVA. Academic studies not meeting the above criteria are INELIGIBLE for payment.

Withdrawal. Withdrawal occurs if employees remove themselves from a course after the drop period has passed. A complete withdrawal occurs if the employee removes themselves from all courses enrolled after the drop period has passed.

Section 2. Eligibility

The Quality Workforce for Oklahoma’s Heroes applies to fulltime employees of the Oklahoma Department of Veterans Affairs. Eligibility of academic degree program is subject to ALL of the following criteria as defined below:

1. Must be a current, fulltime employee of ODVA with at least 12 months continuous regular classified or unclassified employment with the agency. Limited term temporary employment is not included in this calculation.
2. It is understood that an employee’s enrollment in a course is for the benefit of both the employee and the ODVA.
3. Employees who elect to take courses and receive tuition assistance must continue to meet the full responsibilities of their positions. Courses must not interfere with availability for scheduled work or negatively affect work performance.
4. Employees making application must have achieved an overall rating of “meets” or “exceeds” standards on his or her most recent performance evaluation.
5. Employees must not have received any formal discipline within one year of making application to the program.

Section 3. Application Procedures

Applicants for the Quality Workforce for Oklahoma’s Heroes shall provide the following information to the Oklahoma Department of Veterans Affairs Education Review Committee for review and determination of eligibility prior to the start of the course/program to enable making payments on the employee’s behalf:

1. A completed Quality Workforce for Oklahoma’s Heroes Application Form.
2. The employee must have applied for, and been accepted into, the program by the institution providing the education or training. The employee must provide documentation from the education institution for the course(s) or program in which the employee is enrolled.
3. Unless special circumstances warrant, only classes scheduled during non-working hours will be approved for tuition assistance.
4. For classes only offered during working hours, employees must complete an application for “Special Circumstances” and submit it to the Oklahoma Department of Veterans Affairs Education Review Committee prior to approval. Documentation of the special circumstances shall be placed in the employee’s training file along with other documentation required for tuition assistance.

Note: Denial of participation in the education and training program is not grievable.

Section 4. Additional Guidelines

1. Education and training payments will be limited to \$5,250.00 in a calendar year. Per IRS regulation the payment date determines which calendar year the payment is applied.
2. Employees receiving the education and training benefits described in this SOP are responsible for determining tax implications of this benefit on their individual tax returns.
3. Employees eligible to receive scholarships or fee waivers through other governmental or private programs should avail themselves of those programs prior to applying for the Quality Workforce for Oklahoma's Heroes Program. In no case shall total awards from all sources exceed 100% of allowable tuition and fees. In cases where employees receive scholarships or fee waivers ODVA will be the last payer.
4. The total amount of tuition assistance shall not exceed funds set aside for this purpose in the ODVA administrative budget that shall be reviewed and approved by the Executive Director and the Commission each fiscal year.
5. Following completion of the term the employee must provide documentation from their educational institution of the courses completed, including credit hours earned and grade received. The final grade received shall be provided no later than 30 days after course completion. The documentation shall be provided to the Education Review Committee and placed in the employee's training file.

Section 5. Conditions for Receipt

1. The employee receiving benefits under this policy shall execute a promissory note to the ODVA to repay the amount of tuition and fees paid by the ODVA to the education or training institution on behalf of the employee.
2. If the employee participated in the education and training program during working hours, the cost of any funds paid to the employee while attending the course will be included in the total amount of the promissory note.
3. The amount of the promissory note shall be reduced at a rate of \$13.00 per calendar day beginning the first day following graduation or completion from the education or training program.
4. Should the employee fail to make satisfactory progress, as defined by the ODVA, in the education or training program, or withdraw or be terminated from the education or training program for any reason, the promissory note shall be reduced at a rate of \$13.00 per calendar day beginning the first day following termination from the education or training program.

Section 6. Termination of Employment Procedures

1. Should the employee leave employment with the ODVA for any reason, except for employees who have volunteered or have been drafted into active military service, the obligation to the ODVA becomes due and payable immediately in full.
2. Violation of the terms of the promissory note shall give rise to a cause of action and suit may be commenced by the ODVA for and on behalf of the State of Oklahoma for restitution of any and all sums plus interest at the statutory rate, costs, and reasonable attorney fees.

Section 7. Agency Education and Training Administrator Responsibility

The responsibilities of the Agency Education and Training Administrator are to maintain oversight of the program, including the following:

1. Convene the Education Review Committee as necessary.
2. Receive, review and make recommendations regarding employee application for education and training. Contact the employee regarding their application approval or denial with copies to facility administration.
3. Make recommendations to the Education Review Committee and the Executive Director regarding changes to program funding and the SOP.
4. Maintain records of education and training, to include the accumulation of expenditures by the agency on behalf of the employees.
 - a. Ensure expenditures in one calendar year do not exceed the agency limit of \$5,250.00 per employee.
 - b. Coordinate with agency Human Resources and Payroll staff to capture the amount of pay for employees that attended training during working hours.
 - c. Coordinate with Central Office Fiscal Services for payments to education and training establishments, ensuring payments are completed in a timely manner such that student enrollments are not affected.
 - d. Following approval action by the Education Review Committee prepare the required Promissory Note with pertinent information from the application. Provide the Promissory Note to the Center Administrator.
 - e. Ensure employees provide documentation of the courses completed, and grade received within 30 days after course completion.
 - f. In cases where the employee terminates employment initiate action to recover expenditures as accumulated in the promissory note.
 - g. Receive and review requests for leave of absence as they pertain to education programs.
 - h. Following completion of or withdrawal from training monitor reduction of the promissory note as outlined in Section 5.
 - i. Execute the provisions of the education and training program as outlined throughout this SOP, ensuring proper and timely notifications are conducted as delineated.

Section 8. Employee Responsibility

To participate in the ODVA's education and training program the individual employee must:

1. Complete the designated application and submit it to the Center Administrator a minimum of 30 days before beginning of the term.
2. Following signature acknowledgement by the Center Administrator the employee will be solely responsible for submitting the completed application to the Agency Training Programs Administrator.
3. Make application for admission to the program of education or training directly to the education facility or training establishment; acceptance letter must accompany the ODVA application.
4. Complete enrollment with the education facility and training establishment; enrollment documents (class schedule and bursar's bill) must accompany the ODVA application.

5. When the completed Promissory Note is presented to the employee by the Center Administrator, the employee must sign and date the note in the presence of a notary.
6. Notify the Center Administrator and Agency Education and Training Administrator (Central Office) of :
 - a. Completion of the program.
 - b. Termination or withdrawal from the program.
 - c. Courses completed and term grades.
7. If necessary request a leave of absence from the education and training program prior to the start of the next term.

Section 9. Center Administrator

1. The Center Administrator will review that the class attendance does not conflict with the department schedule.
2. The Center Administrator will report any disciplinary action, noncompliance of attendance, or request of leave of absence through the period of the education and training program to the Agency Education and Training Administrator.
3. The Center Administrator will maintain copies of the employee's education application in employees file at the Center Human Resources office.
4. The Center Administrator must sign and date the application form within five (5) business days of receipt and return it to the employee for submission to the Agency Education and Training Administrator located at Central Office.
5. Following receipt of the Promissory Note from the Agency Education and Training Administrator, the Center Administrator will meet with the employee to obtain her or his signature. The Center Administrator will ensure the note is signed in the presence of a notary. The completed note will be forwarded to the Agency Education and Training Administrator within five (5) business days of receipt.

Section 10. Agency Fiscal Services Responsibility

1. Following approval of an application by the Education Review Committee, Central Office Fiscal Services will coordinate with the education and training provider to make payment of tuition and fees.
 - a. Review copies of employee student itemized account statements from the education and training institutions and note the charges approved by the Education Review Committee.
 - b. Ensure payments of these approved charges are made within the timeframe outlined on the itemized account statement
 - c. Obtain a receipt or statement clearly showing the payment for the itemized charges.
2. The Central Office Fiscal Services Administrator will provide a copy of payment (receipt) to the Agency Education and Training Administrator.

Section 11. Facility Human Resources Manager Responsibility

1. Review applications for education and training for completeness and documenting the following issues:
 - a. Review agency records and document employee date of hire to permanent fulltime employment.

- b. Verify employee has at least 12 months of continuous employment with the agency.
- c. Verify the employee has received an overall rating of “meets” or “exceeds” standards on the most recent employee performance evaluation.
- d. Verify the employee has not received any formal discipline within one year of making application to the program.

Section 12. Miscellaneous

Issues that arise that are not covered by the procedures outlined by this SOP will be forwarded to the Education Review Committee for review. Recommendations will be provided by the Education Review Committee to the Executive Director for final determination.