

## Chapter 12 – Education, Training, and Development

### 12.01 Employer-Directed and Employer-Authorized Training or Course Work

- **Policy**

Payment for coursework or training may be authorized under circumstances as outlined below for represented and non-represented classified permanent and project employees with half-time or greater appointments. Colleges or Divisions may also have procedures that should be consulted. **All training activities must have prior approval before the employee participates.**

- **Employer-Directed/ Required Training or Course Work** (Necessary for Successful Performance of Current Duties)

In some cases, training or course work may be required of the employee by the supervisor as part of employment duties. Such training is directly and immediately related to the work needs of the unit and is fully funded by the employer on University time. Such employer-required training (other than recognized on-the-job training programs) is usually of brief duration and is **not** recurring or extensive. For represented employees, also refer to the applicable provision in the appropriate collective bargaining agreement.

- **Payment Procedures** - In all instances of employer-directed/required training or course work, the instructional fees should be paid by the unit when the employee registers, **not** after completion of the course.

**UW-Institutions** - Payments for employer-directed/required training or course work at any UW institution should be made via an internal requisition. If the training or course work is done at a UW institution other than UW-Madison, the requisition should include a notation: "Please issue check for payment."

**External vendors** - Payment for employer-directed/required training or course provided by an external vendor is typically accomplished via an external requisition. However, consult with your Dean/Director's office regarding employing unit policies or procedures.

All requisitions should be routed through the Dean/Director's Office to the Purchasing Services and include a notation: "This is employer-required course work or training".

For comparison to career-related reimbursement, refer to CPO [Appendix 12A](#)

- **Employer-Authorized Career-Related Training or Courses**

- **Non-represented employees** - Career-related courses are those that qualify an employee for advancement. Courses for personal enrichment do not qualify for reimbursement. The training or course is generally taken on the employee's own time, using either leave without pay or accrued compensatory time off. Annual leave or make-up time within the same work week may be arranged if the supervisor or chairperson can show that the unit's work will not be affected adversely.

Refer to CPO-Appendixes [12 A](#) and [12 B](#) for complete information.

(Additional source: the University of Wisconsin General Administrative Policy Paper, Number 25 Issued September 19, 1997, subject: Faculty and Staff Educational Assistance. Access policy at <http://www.uwsa.edu/fadmin/gapp/gapp25.htm>)

- **Represented employees** - The definition of "career-related" varies by the collective bargaining agreement. For the definition of career-related courses and employer obligations, refer to CPO-[Appendix B](#).

- **WSEU Blue Collar employees:** Under WSEU 11/12/8 the Chancellor of the University of Wisconsin-Madison has expanded the definition of career-related

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training and educational activities for blue collar unit employees. Courses may be approved that aid an employee in progressing to any class or class series **within any WSEU bargaining unit** at UW Madison. In addition, reimbursement may be approved at 100% for the amount of contract-authorized coursework at MATC. This change was made because it is mutually beneficial to have language that enables blue collar employees to request training that might prepare them for less physical work at some future time.

- For classified represented employees, funding generally must be provided by the same source as the employee's salary and should be charged to the supplies and expense account. However, to assure consistent campus-wide administration of this contract provision, all requests denied for lack of funding must be forwarded to the Dean's office for review whether the salary source is state or non-state funds. The Dean's representative may consult with the Classified Personnel Office to determine if the request clearly meets all criteria except availability of funds within the unit. If it does, the Dean should take steps to obtain funding for the reimbursement, if possible. The University recognizes that the contract-mandated necessity to provide funds for non-state funded units will represent, on rare occasions, an additional cost the University.
- **Amount** - The amount of reimbursement varies according to employment type or collective bargaining agreement. Refer to [CPO-Appendix B](#).
- **Procedures** - Tuition and fees shall be reimbursed only upon successful completion of the course if the employee is still employed. Books, supplies and travel costs are not reimbursed.

The form entitled [Request for Authorization to Reimburse Employee Tuition](#) must be completed by the employee, and all indicated approvals must be obtained BEFORE the course or training begins. When the course is completed, this form, proof of successful completion of course work, and receipt for tuition payment, should be attached to a [Direct Payment Form](#) for employee reimbursement and then submitted to Accounting Services for reimbursement of tuition only. Refer to Accounting Services in Business Services <http://www.bussvc.wisc.edu/howto/acct/jobtrain.html>.

- **Gift or Grant Funds** - If tuition reimbursement is from gift or grant funds, the Dean's Office must verify with Research Administration that this is an appropriate charge and that funds will be available.
- **Transfers and terminations**  
When an employee enrolls in an approved course while employed by one department and completes the course after transferring to another department, the two departments should come to some agreement as to how reimbursement will be made. Otherwise, the first department must fulfill its obligation. An employee must be employed at the time the course is completed in order to receive reimbursement.