



## **IDEA Public Schools Tuition Reimbursement & Loan Repayment Policy**

### **Purpose**

The Board of Directors (“Board”) of IDEA Public Schools (“IDEA”) adopts this policy to establish guidelines for the advancement and retention of top-performing employees by offering them financial support to receive a degree aligned with and critical to their current work assignment(s).

### **Authority Over Fiscal Matters**

In accordance with state law, the Board has primary and ultimate authority over fiscal matters. If a matter or decision-making process is not addressed in this or other duly adopted policies of the Board, authority rests with the Board. In the event of a conflict between this policy and any other Board policy, such conflict shall be brought to the Board for resolution. Refer to the Board’s Authority Over Fiscal Matters Policy (the “Controlling Policy”) for requirements applicable to this policy.

The Delegates (as defined in Sec. 3(b) of the Controlling Policy) shall report to the Board any business arrangement or transaction with an individual that is an officer, as defined in Sec. 5 of the Controlling Policy, and any conflicted,<sup>1</sup> interested<sup>2</sup> or related<sup>3</sup> party, as defined in other Board policy or applicable law. IDEA (and its officers) IDEA may not enter into a business arrangement or conduct a transaction in such a manner so as to circumvent the requirements of this or other policy.

### **Program Description**

Staff members who are pursuing or have earned an advanced degree directly applicable to their work at IDEA and staff members pursuing a bachelor’s degree that is requisite for a promotion (e.g., co-teacher to teacher or facilities manager to assistant principal of operations) may apply for up to fifty percent (50%) of the annual program cost, up to \$5,250 per year. This may be for a program currently in process or for one completed with loans incurred while employed by IDEA. The grant can be extended for multiple years based on manager discretion. Total reimbursement and repayment cannot exceed fifty percent (50%) of the program cost. **For each year that the employee receives tuition reimbursement or loan repayment, the employee agrees to a year working at IDEA (e.g., in exchange for two (2) years of tuition reimbursement, the employee agrees to two (2) years of employment). In the event that the staff member**

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<sup>1</sup> Tex. Ed. Code § 12.1054; 19 TAC §§ 100.1131 through 100.1135

<sup>2</sup> 19 TAC § 100.1047(f)

<sup>3</sup> Tex. Ed. Code § 12.1166



**voluntarily leaves IDEA within that time frame, the employee will have a payroll deduction for the amount paid in excess of the employee's length of employment, in accordance with applicable law.**

### **Eligibility**

This policy applies to full-time staff members. Staff members must be proficient, as determined by IDEA in its sole discretion, in their current role in order to be considered and eligible for participation in this program.

Employees must successfully complete courses in which they enrolled and, where applicable, maintain a B (3.0) grade point average to receive reimbursement or repayment including current or future eligibility under this policy.

### **Application Process**

Interested staff members should approach their managers about the possibility of tuition reimbursement or loan repayment. The manager will determine whether there are sufficient funds available in the approved budget and whether the program of study is directly applicable to the employee's work and, thus, eligible for this assistance from IDEA. Managers must pay for tuition reimbursement or loan repayment from their approved discretionary budget. Employees must fill out the application for submission to their manager for approval.

Staff members who have been granted tuition reimbursement or loan repayment by their manager must receive a Memorandum of Understanding (MOU) and submit receipts of amounts paid in order to receive funding. Campus business clerks or headquarters assistants will then submit to the Business Office a requisition for employee reimbursement. Additionally, staff members who have been granted tuition reimbursement or loan repayment must provide their manager with substantiation that the educational assistance provided was used for qualifying education expenses within two (2) weeks of their receipt of such funds.

### **Federal Income Tax Requirements**

Staff members who have been granted tuition reimbursement or loan repayment by their manager in excess of \$5,250 on a calendar year basis will have the excess amount reported to the IRS and taxed as wages on the staff member's annual Form W-2. Any amounts paid may be subject to various IRS withholding and reporting requirements and Staff should consult their individual tax professional with any personal tax questions.

**Training and Updates**

The Delegates or designee shall properly train or ensure training is provided to IDEA officers and employees on the requirements of this policy and any administrative procedures adopted to implement this policy. Additionally, the Delegates or designee shall keep IDEA officers and employees informed of any changes to this policy and related requirements.

**Administrative Procedures<sup>4</sup>**

The Delegates shall formally adopt administrative procedures as reasonably necessary to properly administer this policy and to adhere to applicable law and rule. In doing so, the Delegates shall not adopt, and are prohibited from adopting, an administrative procedure that conflicts with applicable law or this policy. Accordingly, the Delegates shall confer with the Board or legal counsel before deviating from the requirements set forth in this policy. In the event that a deviation from this policy becomes necessary, the Delegates shall either recommend an amendment to this policy or the Board's approval of a specific deviation, including the purpose, scope and duration of the requested deviation.

**Date Adopted and Effective**

As set forth in the pertinent minutes to the meeting of the Board, the Board adopted this policy on May 1, 2020, and it became effective on May 1, 2020.

**Retention<sup>5</sup>**

This policy shall be retained until superseded, expired, or discontinued and for five (5) years thereafter in accordance with state law.

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<sup>4</sup> Consistent with 19 TAC § 100.1033(b)(14)(C)(iv), the Board has the final authority to adopt policies governing charter school operations, including authorizing the Delegates or designee to adopt an administrative procedure to implement this policy. Moreover, as set forth in IDEA's Articles of Incorporation and Bylaws and in accordance with Tex. Bus. Org. Code §§ 3.101 and 22.201, the Board is IDEA's governing authority and, as such, manages and directs IDEA's business and affairs through Board actions, resolutions and policy.

<sup>5</sup> Tex. Ed. Code §12.1052; 19 TAC §100.1203; See Record Number GR1000-38 and GR1025-25 in Local Schedule GR: Records Common to All Local Governments, Revised 5th Edition (Effective April 17, 2016) adopted by the Texas State Library and Archives Commission at Texas Administrative Code, Title 13, §7.125(a)(1).



**CERTIFICATION**

The undersigned, being the Secretary of the Corporation, hereby certifies that the foregoing represents a true copy of a Board Policy adopted by the Directors of the Corporation on May 1, 2020, which Policy is in full force and effect and has not been revoked or amended.

DocuSigned by:  
*Ryan Vaughan*  
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Ryan Vaughan, Secretary

5/7/2020

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Date