

## STAFF TUITION REIMBURSEMENT POLICY

### Staff Tuition Reimbursement 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, license, and/or certification aligned with and critical to their current work assignment(s)

Employees may participate in either the **Tuition Reimbursement Program** *or* the **Licensure/Certification Reimbursement Program** within a given calendar year; however, employees are not eligible to receive benefits from both programs in the same year.

#### 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.

#### Tuition Reimbursement Program Description

Staff members who are **pursuing or have earned** credentials may apply for tuition reimbursement under this program. Eligible credentials include:

- **Advanced degrees** (e.g., master’s or doctoral programs) directly applicable to the employee’s work at IDEA
- **Bachelor’s degree programs** that are required for a role change or promotion (e.g., Co-Teacher to Teacher or Facilities Manager to Assistant Principal of Operations)

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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*

<sup>4</sup> *Consolidated Appropriations Act, 2021*

Eligible employees may apply for tuition reimbursement of up to **fifty percent (50%) of the annual Tuition not to exceed \$5,250 per calendar year**<sup>4</sup>. Tuition Reimbursement may apply to a program

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currently in progress or to a program completed provided the employee was actively employed by IDEA Public Schools at the time the expenses were incurred, or as applicable. Retroactive tuition reimbursements for coursework completed in prior calendar or fiscal years will not be approved. Employees must have completed a minimum of two (2) years of continuous service in a full-time role with the organization to be eligible for Tuition Reimbursement benefits with special considerations taken into account for instructional and high need roles as defined by the Talent Team.

Eligible employees must be in good standing as defined in the Employee Handbook at IDEA Public Schools.

Employees are required to submit reimbursement requests **promptly upon completion of coursework and posting of final grades.**

Total tuition reimbursement and repayment may not exceed **fifty percent (50%) of the total program cost.** Any **grant or scholarship** applied toward tuition will be deducted from the total tuition amount prior to calculating reimbursement eligibility. Only the **net tuition balance** is eligible for reimbursement. **Fees and non-tuition expenses are not eligible** for reimbursement under this policy.

For each calendar year in which an employee receives tuition reimbursement, the employee agrees to complete **one (1) additional year of employment** with IDEA Public Schools (e.g., two (2) years of tuition reimbursement requires two (2) years of service).

### **Eligibility**

This policy applies to full-time staff members.

Employees must successfully complete enrolled courses and, when grades are issued, earn a minimum grade of B in each course (or equivalent based on institution's grading system) to receive reimbursement and maintain eligibility for future reimbursement under this policy. (e.g., an employee who completes a course and earns a B or higher will be eligible for reimbursement, while an employee who earns below a B will not be reimbursed and may lose eligibility for future tuition reimbursement until program requirements are met.)

### **Application Process**

Interested staff members should approach their managers about the possibility of tuition reimbursement. 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 from their approved discretionary budget. Employees must fill out the application for submission to their manager for approval within one calendar year. For short-term programs lasting less than one year, IDEA may either pay the cost of professional development or certification directly, or process the expense through the Education/Certification Assistance Policy

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Staff members who have been granted tuition reimbursement by their manager must receive a written Tuition Reimbursement Agreement 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.

### **Federal Income Tax Requirements**

Staff members who have been granted tuition reimbursement 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.

### **Licensure/Certification Reimbursement Program**

Staff members who are pursuing or have earned licensure or certifications that are directly aligned to their role at IDEA Public Schools may apply for reimbursement.

#### **Eligible credentials include:**

- Teaching or educator certifications
- Professional licensure or certifications

### **Reimbursement Amount and Limits**

#### **1. Certification/licensure-Related Fees (100% Reimbursement) *in accordance with House Bill 2 (HB 2), 89th Texas Legislative Session***

The following required certification expenses are eligible for reimbursement at **one hundred percent (100%)**:

- Certification exam fees
- Certification application fees
- Fingerprinting/background check fees

#### **2. Certification/licensure Program & Coursework (50% Reimbursement)**

The following expenses are eligible for reimbursement at **fifty percent (50%)**:

- Educator Preparation Program (EPP) costs
- Certification-related coursework and training

### **Annual Maximum**

Total reimbursement for all eligible expenses is **not to exceed \$5,250 per calendar year**.

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Any grants, scholarships, or external funding applied toward certification costs will be deducted prior to calculating reimbursement eligibility. Only the **net certification balance** is eligible for reimbursement.

### Licensure/Certification Completion Requirement

Employees may pay for certification or licensure expenses in installments or in full. Reimbursement requests may only be submitted **after the employee has successfully obtained the certification or licensure**. Once the certification or licensure has been obtained, employees have **up to one (1) calendar year** to submit a reimbursement request. Requests submitted after this timeframe will not be eligible for reimbursement.

All requests must include appropriate documentation, including:

- Itemized receipts
- Proof of payment
- Proof of certification or licensure completion

Expenses must be directly related to the certification or licensure program. All reimbursements are subject to review and final approval by the appropriate departments. Employees must have completed a minimum of two (2) years of continuous service in a full-time role with the organization to be eligible for Licensure/ Certification Reimbursement benefits with special considerations taken into account for instructional and high need roles as defined by the Talent Team.

### Eligibility Requirements

To be eligible, employees must:

- Be actively employed by IDEA Public Schools at the time expenses are incurred **and** at the time of reimbursement
- Be in good standing, as defined by the Standards of Conduct in the Employee Handbook
- Submit complete and accurate documentation as part of the reimbursement request
- All reimbursements are subject to review and final approval by the appropriate departments

### 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>5</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.

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### 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 revised on April 29, 2026, and it became effective on April 29, 2026.

### Retention<sup>6</sup>

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

### CERTIFICATION

The Undersigned, being the Secretary of the Corporation, hereby certifies that the foregoing represents a true copy of the Board Policy relating to Staff Tuition, as originally adopted by the Board on June 13, 2019, and as subsequently amended by the Board on May 1, 2020, October 22, 2021, and June 16, 2026, which Policy, as amended, is in full force and effect and has not been revoked or amended.

Signed by:  
  
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Ed Rivera, Secretary

6/17/2026

Date

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<sup>5</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>6</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).