EDUCATION ASSISTANCE POLICY

STATEMENT OF POLICY

Memorial Health System is committed to assisting in the education goals and pursuits of employees. This policy currently applies to employees of the following affiliates: Memorial Medical Center, Memorial Health System Corporate, Memorial Home Services, Abraham Lincoln Memorial Hospital and Taylorville Memorial Hospital. Two means of education assistance are offered:

- **Tuition Reimbursement**: Financial assistance available to qualified employees to support their education development aligning with their career goals and the goals of Memorial Health System in exchange for a work commitment.

- **Education Grant**: Financial assistance for employees and external candidates to pursue education in exchange for a work commitment once the education is completed. Education grants are available to those pursuing health care careers that are deemed critical to the organization’s present or projected staffing needs. Grant applications for all careers will be reviewed on a case-by-case basis with a final determination made by the Vice President & Chief Learning Officer.

Education assistance is a partnership between the System and the applicant and is not intended to cover all expenses related to the applicant’s education but rather assist in relieving some of the financial burden. Employees may take advantage of only one type of Memorial Health System Education Assistance at any one time.

GUIDELINES FOR TUITION REIMBURSEMENT

1. Employee Eligibility
   a. Completion of six months of employment.
   b. Be a full-time, part-time, or per diem employee who has worked a minimum of 832 hours in a 12-month period.
   c. No active corrective action on file and demonstrate behaviors consistent with Memorial’s Behavioral Standards and policies.
   d. Meet eligibility requirements at the time the course is completed.

2. Academic Coursework Eligibility
   a. Related to the employee’s present job or to prepare the employee for future advancement.
   b. Minimum grade of C required in undergraduate courses and minimum grade of B is required in graduate courses.
   c. Course may be for academic credit, or non-credit if approved in advance by the applicant’s System Leadership Team Representative.

3. Professional Development Coursework
   a. This type of education is not support through Memorial’s Education Assistance Policy.
   b. Financial assistance for professional certification coursework **may be** available through an employee’s respective department. Such support is considered on a case-by-case basis, is funded at the department level and requires department manager as well as System Leadership Team Representative approval.
4. Reimbursement Schedule
   a. Maximum value of tuition reimbursement can be found in the table below.
   b. For employees who worked a minimum of 1820 hours in the 12 months immediately preceding the request for tuition reimbursement: reimbursement of expenses for tuition, books, and required fees, up to a maximum of $3,500 per calendar year depending on the level of education (see table below).
   c. For employees who worked between 832 and 1819 hours in the 12 months immediately preceding the request for tuition reimbursement: reimbursement of tuition, books, and required fees, up to a maximum of $1,750 per calendar year depending on the level of education (see table below).

| 1820 + hours worked in the previous 12 months: | 832 – 1819 hours worked in the previous 12 months:
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,500/yr maximum thru Associate degree*</td>
<td>$1,250/yr maximum thru Associate degree</td>
</tr>
<tr>
<td>$3,000/yr Bachelor’s degree</td>
<td>$1,500/yr Bachelor’s degree</td>
</tr>
<tr>
<td>$3,500/yr Graduate degree</td>
<td>$1,750/yr Graduate degree</td>
</tr>
</tbody>
</table>

*This includes prerequisites, certification courses, and classes required for an Associate’s degree, but does not include continuing education required for licensure.

5. Tuition Reimbursement Procedure
   a. Employee completes Section I of the Request for Tuition Reimbursement and forwards the form to his/her manager for approval prior to the start of the course(s). If approved by the manager, the manager returns document to employee who then presents to the appropriate System Leadership Team Representative for final approval.
   b. Upon System Leadership Team Representative approval, employee forwards the form to the Career Development Office so the information can be entered in a tracking database. Requests submitted after the start of a course will not be approved for reimbursement.
   c. After successful completion of coursework, employee submits final grade(s), tuition bill, and receipts for textbook purchases to the Career Development Office. All documentation must be submitted at the same time and within one month after the last day of the class.
   d. Career Development will verify final grade(s) and costs and notify General Accounting to proceed with reimbursement if applicable. Based on applicable tax laws at the time of reimbursement, the employee’s reimbursement may be subject to taxation.

6. Work Commitment
   a. Employees who receive tuition reimbursement will agree to a work commitment equal to one year regardless of the amount of funding received and the number of years that an employee receives tuition reimbursement.
   b. If the employee separates from the organization prior to completing the one-year work commitment they will be responsible for repaying the amount awarded during the 12 months immediately prior to separation.
   c. The work commitment will begin when the reimbursement payment is sent to the employee.
   d. Any tuition reimbursement received prior to January 1, 2011 will not be subject to the work commitment.
GUIDELINES FOR EDUCATION GRANTS

1. Grants are awarded for job-related courses that are identified by Memorial Health System as relating to the present or future needs of the organization.

2. Grants may be awarded subsequent to program completion; however, all guidelines and requirements will remain in full effect. Requests for post-education grant awards will be evaluated on a case-by-case basis.

Leadership/Management institutes and/or fellowships conducted by an appropriately accredited academic or professional organization may be considered appropriate with System Leadership Team Representative approval.

3. Grants will be awarded at the following levels:

<table>
<thead>
<tr>
<th>Courses</th>
<th>Maximum Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical courses, and associate degree</td>
<td>Up to a maximum of $5,000</td>
</tr>
<tr>
<td>Bachelor degree completion programs (i.e. RN-BSN completion)</td>
<td>Up to a maximum of $8,000</td>
</tr>
<tr>
<td>Baccalaureate degrees (traditional)</td>
<td>Up to a maximum of $12,000</td>
</tr>
<tr>
<td>Accelerated Second-degree Pre-licensure Baccalaureate degrees</td>
<td>Up to a maximum of $15,000</td>
</tr>
<tr>
<td><em>(defined as programs for students with a baccalaureate degree in a different field who receive a new degree upon completion of the accelerated program i.e. accelerated second degree pre-licensure nursing program)</em></td>
<td></td>
</tr>
<tr>
<td>Graduate degrees</td>
<td>Up to a maximum of $20,000</td>
</tr>
<tr>
<td>High demand and high cost graduate/technical programs, e.g. Certified Registered Nurse Anesthetist, Pharmacist, etc.</td>
<td>Up to a maximum of $30,000</td>
</tr>
</tbody>
</table>

4. Application Requirements
   a. Pre-requisite classes must be completed.
   b. Must be accepted into a program of study at an institution located in the state of Illinois. Exceptions may be granted if an equivalent program of study is not available in the state of Illinois and the student must submit a letter of approval for an exception from his/her System Leadership Team Representative.
   c. A copy of the acceptance letter must be submitted along with the requirements listed in 4.a. and 4.b.
d. Programs of study that are exclusively online are discouraged except in unusual circumstances. To receive approval for financial assistance to attend such a program, the student must submit written approval from his/her System Leadership Team Representative.

e. Applicants’ selected education institution and program of study must both be fully accredited by an agency or organization that has been approved by Memorial Health System Senior Leadership. A list of approved accrediting bodies can be found in Appendix A.

f. Must have a cumulative grade point average of at least 2.50 on a 4.0 scale and must have attained no lower than a “B” average in core classes completed at the time of application.

g. System Leadership Team Representative approval must be secured prior to applying for an education grant. Approval is to be indicated by signing the application form.

5. Application Process for Current Employees

a. Employee completes the Education Grant Application packet.

b. Employee must provide verifiable documentation of total program costs. Acceptable forms of documentation include any formal correspondence from the school that identifies program costs. Under no circumstances will an employee receive a grant award that exceeds total program costs.

c. Employee must provide evidence of the institution and program’s accreditation status that shall include the names of the accrediting agency/agencies under which the institution and program claims accreditation.

d. Once application is complete, employee will schedule a meeting with his/her manager to discuss his/her development plan as it relates to career objectives and organizational needs.

e. If the employee has no active corrective action on file, has demonstrated good performance as evidenced by the most recent performance appraisal, and if the manager believes that the employee’s behavior supports Memorial’s Behavioral Standards and policies and procedures then the manager completes the “Manager Recommendation” section. The completed Education Grant Application and attachments are returned to the employee who then presents them to the appropriate System Leadership Team Representative for approval. Following System Leadership Team Representative approval, the employee must submit the application and attachments to the Career Development Office by the application deadline (November 1, March 1 or June 1).

f. If the manager believes that the employee does not meet these criteria, the manager discusses these issues with the employee. The Education Grant Application is forwarded to the Career Development Office by the manager along with the manager’s documentation of the reasons why the employee is not recommended for an Education Grant.

g. The Career Development Office will formally notify all applicants of their acceptance or denial for an Education Grant.

6. Application Process for External Candidates

a. Candidates submit a completed Education Grant Application packet to the Career Development Office where the application and attachments will be reviewed for completeness.

b. Candidate must provide verifiable documentation of total program costs. Acceptable forms of documentation include any formal correspondence from the school identifying program costs. Under no circumstances will a candidate receive a grant award which exceeds total program costs.

c. Candidate must provide evidence of the institution and program accreditation status that shall include the names of the accrediting agency/agencies under which the institution claims accreditation.
d. Qualified applicants will be interviewed by a member of the Career Development Team to determine eligibility for hire and by the MHS leader qualified to evaluate the applicant’s potential to fill the role for which he/she is studying.

7. Criteria for Final Approval
   a. The Career Development Team will review all completed applications
   b. Decisions will be rendered based on the following criteria:
      - Education preparation will lead to a position that meets a business and/or strategic need of the organization.
      - There is funding available to support the grant.
      - The applicant is eligible to receive funding based on the information in the completed application, the manager’s recommendation and approval by the System Leadership Team Representative (internal), and letters of recommendations and the interview with a Career Development Team member (external).
      - All grant awards are subject to the approval of the System Leadership Team Representative of the department relative to the applicant’s course of study and the approval of the Vice President, Organization Development & Chief Learning Officer.

8. Ongoing Eligibility
   a. Each semester/quarter, students must furnish grade reports to the Career Development Office within one month of receipt.
   b. If the student meets the ongoing eligibility requirements, the Career Development Team will send a request for payment to Accounts Payable.
   c. If the student does not achieve and maintain a 2.50 overall GPA and a minimum of a “B” average in core classes for each semester of academic study, payment will be discontinued for one semester during which time the student has the opportunity to achieve the GPA requirements.
   d. Funding withheld during the probation period will not be distributed to the student after eligibility has been regained.
   e. If the minimum GPA, overall and for core classes, is not achieved after the one-semester suspension of funding, the student will be in default of the grant agreement and will be contacted by The Career Development Team to create a repayment plan for any monies previously disbursed.
   f. Each case will be evaluated on an individual basis.

9. Education Grants are not paid in lump sum amounts. Payments are made over the course of the degree program and may or may not correspond to the student’s academic calendar.

10. To receive grant funding, recipients must sign a contract agreeing to a work commitment with Memorial Health System when they complete their course of study. If the employee separates from the organization prior to completing the work commitment, they will be responsible for repaying a pro-rated amount of the total award. For example, if an employee commits to 4 years of work for an award of $10,000 and only works 3 years, that employee must repay $2,500. The work commitment will begin when the employee completes the education requirements and is awarded a degree. The work commitment is as follows:
$2,500 1 year commitment (2080 hours of work)

For each additional $2,500 An additional year (2080 hours of work) is required up to a maximum of five years, (10,400 hours of work)

Note: Work commitments will be prorated based upon actual value of the award. i.e. $3,500 equals 2912 hours vs. 4160.

This policy has been reviewed and approved by:

Aimee J. Allbritton, PhD
Vice President, Organization Development
and Chief Learning Officer

Tuition Assistance policy reviewed - July 2000
Education Grants policy approved - January 2001
Policies combined and approved - September 2000
Review and Revised - February 2005
Review and Revised – August 2006
Review and Revised – August 2007
Review and Revised – November 2007
Review – April 2009
Review and Revised – September 2010
Review and Revised – February, 2011
Review and Revised – April, 2013
Review and Revised – June, 2013
Appendix A: Approved Discipline-specific Accrediting Agencies and Institutional Accrediting Bodies

Institutional Accreditation: Regional accreditation is the most basic accreditation an institution should have. This accreditation encompasses the entire college or university and is referred to as an institutional accreditation. This type of accreditation shows that the entire institution is contributing towards achievement. Students applying for education assistance must provide documentation that their chosen institution is accredited by one of the following regional accrediting bodies:

- Middle States Association of Colleges and Schools/Middle States Commission on Higher Education (MSCHE)
- North Central Association of Colleges and Schools The Higher Learning Commission (NCA-HLC)
- New England Association of Schools and Colleges Commission on Institutions of Higher Education
- Northwest Commission on Colleges and Universities (NWCCU)
- Southern Association of Colleges and Schools (SACS) Commission on Colleges Western Association of Schools and Colleges
- Accrediting Commission for Senior Colleges and Universities (WASC-ACSCU) Western Association of Schools and Colleges
- Accrediting Commission for Community and Junior Colleges (WASC-ACCJC)

Program Accreditation: In addition, students must show documentation that their chosen program of study is accredited by one the following accrediting bodies as applicable. If applying for an education grant to study a discipline other than one listed in the table below, the applicant must work with his/her System Leadership Team Representative and the Career Development Team to review and confirm an acceptable accreditation similar in rigor to the others approved. The disciplines listed in the table below are currently viewed as mission-critical to the System; however, the System workforce needs will be evaluated on an ongoing basis. Applying for education assistance for one of these fields does not guarantee funding but rather allows for prioritization of applications. Applications for financial assistance for study in a field outside of the ones listed will be reviewed on an individual basis to determine need within the System.
<table>
<thead>
<tr>
<th>Discipline</th>
<th>Approved Accrediting Body/Bodies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursing</td>
<td>- Commission on Collegiate Nursing Education (CCNE)</td>
</tr>
<tr>
<td></td>
<td>- National League for Nursing Accrediting Commission (NLNAC)</td>
</tr>
<tr>
<td></td>
<td>- Council of Accreditation of Nurse Anesthetists (COA)</td>
</tr>
<tr>
<td>Physical Therapy</td>
<td>- Commission on Accreditation of Physical Therapy Education (branch of American Physical Therapy Association APTA)</td>
</tr>
<tr>
<td></td>
<td>- American Speech Pathology &amp; Hearing Association (ASHA)</td>
</tr>
<tr>
<td>Occupational Therapy</td>
<td>- Accreditation Council for Occupational Therapy Education (ACOTE)</td>
</tr>
<tr>
<td></td>
<td>- American Occupational Therapy Association (AOTA)</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>- Accreditation Council for Pharmacy Education (ACPE)</td>
</tr>
<tr>
<td>Respiratory Therapy</td>
<td>- Commission on Accreditation for Respiratory Therapy (CART)</td>
</tr>
<tr>
<td></td>
<td>- Commission on Accreditation for Respiratory Care (CoARC)</td>
</tr>
<tr>
<td>Medical Diagnostic Sonography</td>
<td>- Commission on Accreditation of Allied Health Education Programs (CAAHEP)</td>
</tr>
<tr>
<td>Clinical Laboratory Science</td>
<td>- National Accrediting Agency for Clinical Laboratory Sciences (NAACLS)</td>
</tr>
<tr>
<td>Health Informatics/Health Information Management</td>
<td>- Commission on Accreditation for Health Informatics and Information Management (CAHIIM)</td>
</tr>
<tr>
<td>Business</td>
<td>- Association to Advance Collegiate Schools of Business (AACSB)</td>
</tr>
</tbody>
</table>

*Note: Data confirmed by MHS Program Leaders*