KUTZTOWN UNIVERSITY
Guidelines for the Approval of Out Service Training Requests

Employee training and development is a joint venture between Kutztown University and its employees. The objective is to successfully achieve the goals of the university and maximize the efficiency of operations through the optimum use of skills and talents.

Training needs should be identified and discussed during the initial meeting with the employees at the beginning of their performance evaluation period. At that time, options for securing training should be explored. Internal resources should be exhausted before exploring external ones. For example, if an academic course is selected for training, the course should be taken at Kutztown University if the course is offered in the appropriate academic year.

Where out-service training is appropriate, the employee and supervisor should review the programs or courses available that best meet the needs identified. Budgetary concerns also should be clarified at this time to ensure that the proposed plan is in line with those limited resources. Then agreement should be reached on the development goals for the year and the plan for meeting those goals.

As out-service training is requested during the evaluation period, the supervisor should sign the request form, and indicate that this training is consistent with the agreed upon development plan. The divisional vice president should then approve the out-service training request based on available budget, concurrence with the plan for employee development and compliance with the attached policy. Upon approval, the form should be sent to Human Resources where it will be reviewed for policy compliance and consistent application throughout the University. A copy should then be forwarded to the Business Office for processing. (Funding requests for Tuition Re-imbursement will be held by Human Resources and submitted to Business Office upon receipt of grades. Since this is a re-imbursement plan funds will not be encumbered until after the course completion. Funding source approvers should keep this in mind and be sure to hold funds in reserve)

Out-service training costs/fees are not to exceed $3000 per occurrence/semester. Costs/fees are not guaranteed and are contingent upon available funding. Payment for non-academic courses or training should be made directly to the training source while any travel costs should be reimbursed directly to the employee. Payment for academic courses will be made to the employee only after the employee supplies evidence of having met the following criteria for successful completion: (a) undergraduate academic courses require a final grade of "C" or above and (b) graduate academic courses require a final grade of "B" or above. Note: Dissertation fees/credits are not included in this program.

Out-service training should not be used to rectify poor hiring decisions where employees do not meet the minimum skills or knowledge for the job. These training needs should be the responsibility of the employee. Successful completion of the probationary period is a requirement to be eligible to receive out-service training funds.

Following this process will ensure consistent application of the out-service training policy, address budgetary concerns, and eliminate difficulties with employee expectations not matching management's intentions with respect to reimbursement for out-service training.

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Out-Service Training Processing Instructions

Employee	• Identify training needs with supervisor at beginning of performance evaluation period and identify training sources. • Complete and sign Out-Service Training Request form. • Forward form and information to document training and related costs to supervisor for review and approval.
Supervisor	• Review form for consistency with agreed upon development plan and to ensure that payment amount is in compliance with guidelines. If more documentation is required to substantiate payment amount, request additional information from employee. • Budget source should be coded at bottom of form. • Determine if training is related to current job or will be used for future promotion or job transfer. Check appropriate block to indicate such on form. (Most training should be related to the current job. Out-service-training may be authorized to prepare employees for promotions or for transfer into different classifications only when agency heads anticipate a business need for employees with such skills) • Sign form, if approved and forward to the Divisional Vice President for review and approval.
Vice President	• Review form for policy compliance and budget availability. • Sign form, if approved and forward to Human Resources.
Human Resources	• Review form for consistent application throughout university and policy compliance. If request is for an academic course, form will be held pending grade outcome. • Sign form, hold for grade (credit courses only) and send a confirmation email to employee with instructions to next step or forward to Business Office to process if approved.

Employee	• Upon course completion, forward final grades and a check requisition to the Human Resource Office.
	  o If training/course was at Kutztown University, then make payable to Kutztown University.
	  o If training/course was at another institution, then make payable to employee with an official invoice stating the amount due and a payment receipt attached.

Human Resources	• If grades meet pre-established criteria, Human Resources will forward form to the Business Office to process refund to employee.
	  o Undergraduate course – C and above
	  o Graduate course – B and above

Final steps to assess tax:	
Business Office	• Code and process payment to employee/vendor. • Review taxability of reimbursement. If taxable, forward copy of form and reimbursement to Payroll for processing.
Payroll	• Establish employee tax liability and process through payroll system.