

Document Title: Tuition Assistance Policy

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Revision: Rev 2

REVISIONS & APPROVALS

REV NO.	DATE	DESCRIPTION	ORIGINATOR	CHECKED	APPROVED
1	23.04.2024	PRELIMINARY ISSUE	SR	LO'D	JT
2	09.10.2024	Rev. 2; Inclusion of CPD Hours	LO'D	SL	JT

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1.0 Background

Rockwell is committed to the development of its staff both for the benefit of the company and the individual. The purpose of this policy is to encourage and support staff undertaking further education. Accordingly, the company is favourably disposed to funding academic fees in respect of courses deemed to be relevant to the work of the organisation.

Each application will be considered on merit to determine if it meets the criteria for funding set out below. All applications will be assessed by the HR team and the applicant's line manager to ensure the course applied for will deliver the best balance of expertise across the company within the allocated budget. Approved applications will proceed to SLT for final approval.

The HR team will have responsibility for supporting the operation to the benefit of the maximum number of eligible staff, across all levels, within available budgetary capacity.

2.0 Coverage

Courses of study must:

- Be approved by HR, the employee's line manager and the SLT in advance of commencing the course.
- Be pursued primarily in the employee's own time.
- Be provided by a University or other recognised educational institution or professional body.
- Lead to a recognised qualification of at least Level 4 on the National Framework of Qualifications (see Appendix 2).
- Be relevant to the employment of the employee(s) and also to assist in achieving the business needs of Rockwell.
- Be included in the employee's agreed individual development plan, which is agreed with their line manager.
- Not duplicate or mirror training already available within Rockwell.

This support is only available to employees who have successfully completed their probationary period.

3.0 Budgetary Constraints

Funding of academic fees is dependent on the availability of funds in any given year. Once the allocated budget is distributed to successful applicants, any further applications will have to wait until further funding becomes available. Nonetheless, once a person has qualified for coverage of tuition fees for the first year of a course, the intent would be that the individual would qualify for coverage for each successive year of the same course, subject to the usual requirements and subject to him/her remaining in Rockwell at a successful performance level.

Where an employee independently commits to a course to benefit themselves or explore a career change for personal reasons, without prior consultation or agreement with the company, Rockwell may still make a contribution towards the course costs. This will be considered if the course, upon review, is found to be beneficial to the Company. The level of contribution, if any, will be determined on a discretionary basis, subject to available budget and alignment with company needs.

4.0 General Information

Details of relevant courses available can be obtained directly from the third level institutes, via their websites.

The HR team will be happy to answer any questions concerning the operation of this scheme.

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5.0 General Conditions

- Managers should be aware that in considering an application for funding of fees, an employee's current performance of duties and service should be reviewed.
- Rockwell reserves the right to determine the order of priority for funding purposes within the courses having regard to the business needs of the company.
- In order to assist applications from employees, the applicant's line manager is asked to indicate on the application form their opinion of the relevance, or otherwise, of the proposed course of study to the employee's existing work area. Further consultation by the HR team with managers may take place, if necessary.
- Employees must apply for a coverage of fees before undertaking courses of study. Applications for courses already undertaken will not be approved.

6.0 Procedures

The procedures governing funding of fees are as follows:

6.1 Prior Approval

Approval must be obtained from the HR team, the employee's line manager and SLT prior to commencing or continuing any course. Employees should be aware that some educational institutions may operate a first come, first served basis and check this for themselves.

All applications should include:

- **A copy of the course syllabus**
- **Evidence of the cost of the course, including examination fees, from the educational institution**
- **A copy of the course calendar**

Applications for funding of courses must be supported with a business case from the line manager of the applicant, outlining how the applicant will be able to use the knowledge and skills acquired in their current role to a significant degree and the benefits accruing to the company from the applicant's participation in the course.

The notification to approved applicants will include authorisation for the educational institute to charge Rockwell Engineering with the cost of the course. Where the cost of the course exceeds the level of funding, the remaining balance must be borne by the applicant.

6.2 Level of Funding

The following limits will apply in relation to the level of funding:

- The maximum amount payable for any one academic year in respect of any course will be determined on a case-by-case basis.
- The maximum payable in respect of any total course duration will be €20,000.

Where the cost of the course being pursued exceeds the level of funding, as outlined above, the remaining balance must be borne by the applicant.

In addition to the level outlined above, the rate of funding may vary from year to year or between course types, depending on the available budget and the company's training priorities at that particular time.

6.3 Requirements at the End of Each Academic Year

At the end of the academic year participants must **submit the following documents to the HR team no later than 3 months from the date of completion:**

- A statement from the Institution confirming that any prescribed tests or examinations were taken.

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- Where the current year is the final year of a course, an official statement of results, detailing the subjects studied, the results obtained, and qualifications achieved, as appropriate.
- An electronic version of the final year thesis/dissertation, where appropriate.

In no circumstances will payment be made in respect of years or course periods which are repeated.

6.4 One Application per Academic Year or Course Period

Approval may be granted in respect of only one course for any employee within any 12-month period. An employee will be expected to satisfactorily complete one course before undertaking another.

In specific cases, however, further study may be pursued in consecutive years, provided the study is within the same discipline and forms an integral part of the same qualification. For example, an employee who is approved under the scheme to pursue a diploma course will normally be approved, on successful completion of the diploma, to undertake without break a primary degree within the same discipline, as the diploma is a constituent part of that degree.

Where an employee who has been granted coverage of fees for a third level course and subsequently wishes to pursue a course in another discipline, Section 6.4 rule applies.

6.5 Proximity of Course Location to Work Location

Where possible employees should source an appropriate course within the same geographical location as their work location, or alternatively online.

6.6 Course Work

Employees pursuing courses which involve undertaking projects, essays or theses must, choose a topic which is relevant to the company. Where possible and within academic constraints, practical work should be aligned with organisational issues and should be made available to the company as a resource for learning and development.

All applicants funded by the company to complete courses, especially those pursuing post-graduate qualifications, are expected to share the knowledge and skills acquired through the course as requested. The employee should be available to different areas of the company to carry out tasks which relate to the course pursued and may be asked to present on their thesis subject.

Dissertations produced during the course of a Masters or PhD must be made available to the company and employees must agree that the company will have full right of access to any research carried out in the course of completing the programme.

6.7 Study Leave/Examination Leave

Employees who qualify for coverage of fees may apply for paid study leave subject to the approval of their line manager and the HR team. Study leave will be provided on a pro-rata basis for employees working in part-time roles. Applications must be made through Bamboo for the approval of study leave by HR and the line manager. Criteria for application is outlined in Appendix 1.

Paid examination leave is allowed for approved courses where the examination takes place during normal working hours. **The period of examination leave is limited to the day(s) or half day(s) that is required to sit the actual examination.** Paid examination leave will only apply to part-time staff if the examination takes place when they are scheduled to work. Applications must be made through Bamboo for the approval of examination leave by HR and the line manager. Criteria for application is outlined in Appendix 1.

Paid study or examination leave will not be granted where a course is being repeated.

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6.8 Continuing Professional Development (CPD) Leave

Employees are entitled to a total of 6 days of leave annually for Continuing Professional Development (CPD). For each day an employee takes annual leave or leave at their own expense for CPD purposes, Rockwell will provide one additional paid day of CPD leave, up to a maximum of 3 paid days. This means employees can use 3 days as annual leave or at their own expense and receive 3 paid days from the Company for CPD in any given year. This leave supports employees in maintaining their membership in relevant professional bodies and enhances their skills and knowledge applicable to their roles at Rockwell.

To request CPD leave, employees must submit their applications through Bamboo for approval from HR and their line manager. The criteria for application are outlined in Appendix 1.

6.9 Undertaking

Before payment is made employees will be required to confirm, in writing, their commitment to repay this money in the event of he/she leaving Rockwell before completing one year's service in respect of each academic year/course period for which a payment has been made. Where a course is shorter than an academic year, the amount of service required will be calculated on a pro-rata basis. The academic years/course periods themselves do not reckon as service in this context.

For example, an employee undertaking a three-year course will be required to provide three years' service from the date of the final examination.

Example: An employee completes a 4-year course on 16th January 2021. Rockwell funded a total of €12,000 in fees for the course (i.e. €3,000 per year).

Scenario 1: If the employee leaves or retires from Rockwell on 10th January 2024 (i.e., having only served 3 full years since completing the course) he/she must repay one full year's fees to Rockwell i.e. €3,000.

Scenario 2: If the employee leaves or retires from Rockwell on 12th January 2023 (i.e., having only served 2 full years since completing the course) he/she must repay 2 full years of fees to the company i.e. €6,000.

Employees will be advised to repay the full amount to the company immediately. Should the employee fail to repay the monies, this declaration authorises Rockwell to deduct these monies directly from the employee's salary.

7.0 Exceptional Circumstances

In exceptional circumstances, Rockwell may waive some of the conditions attached to the coverage of fees.

The employee is required to submit a detailed request to both their line manager and the HR team. Approval from the SLT team is necessary to authorise any such application.

8.0 Other Costs

- Ancillary costs associated with participation in a course (textbooks, copying, binding etc.) are **not** funded by the company.
- Travel and subsistence will **not** be paid in respect of regular attendance at any course.
- Additional costs associated with deferrals or postponements of courses will **not** be covered by Rockwell.
- Membership fees to professional bodies will be funded by the company, subject to the following conditions:
 - ✓ The membership is deemed necessary for the employee to fulfil their job responsibilities effectively.
 - ✓ The membership is directly related to the employee's role within the organisation or is beneficial for their professional development.
 - ✓ The membership contributes to the employee's skill enhancement, knowledge acquisition, or networking opportunities relevant to their work.

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- ✓ The membership is not solely for personal or recreational purposes but also aligns with the company's objectives and industry standards.

The company may require employees to provide justification or documentation to support their request for membership funding. Approval for funding is contingent upon budget considerations and alignment with the company's strategic goals.

All queries related to payment of membership fees to professional bodies should be directed to the HR team.

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Appendix 1**KEY STUDY AND EXAM LEAVE ENTITLEMENTS UNDER THE TUITION ASSISTANCE POLICY**

Please note that the material below represents a summary only and does not purport to outline all of the detailed provisions applicable to these matters. Employees are encouraged to consult the HR team in the first instance for full details in this regard.

Paid Study Leave

Employees who qualify for coverage of fees will be provided paid study or training leave as follows:

- Up to 5 days in respect of Masters Level degree obtained through an accredited University or Institution (Level 9 or Level 10 on the QQI, see Appendix 2).
- Up to 5 days in respect of the final year only of a Third Level primary degree obtained through an accredited University or Institution (Level 7 or Level 8 in the QQI, see Appendix 2).
- Up to 3 days allocated for other academic years of a Third Level primary degree programme or a course of similar or equivalent status in the QQI.
- Reduced pro-rata paid study leave for Special Purpose Award courses and courses which do not contain examinations will be awarded on a case-by-case basis.
- Reduced pro-rata paid study leave for employees not attending/undertaking the whole course in a given year (e.g. repeating a module) will be awarded on a case-by-case basis.
- Paid study leave will not be allowable for a year when an examination has to be repeated.
- Up to 6 days annually designated for Continuing Professional Development (CPD) to uphold membership in a professional body pertinent to the employee's occupation, with activities that enhance professional skills and knowledge applicable to their role.

Unpaid Study Leave

Employees who wish to pursue courses which involve regular or continuous absence from official duties may be facilitated under career break or unpaid leave agreements. For further information in this regard, please contact the HR team.

Examination Leave

Employees who qualify for coverage of fees may be allowed paid examination leave for the purpose of sitting the examinations held by the institution. The period of paid absence should be limited in each case to the day(s) or half-day(s) which are actually and necessarily spent at the examinations.

Paid examination leave will not be granted where an examination has to be repeated.

Part-time employees will be granted examination leave depending on whether or not they were scheduled to work for the period in question.

If an employee is undertaking a course which does not qualify for coverage of fees, Rockwell may, at its discretion, permit some paid leave for examination purposes. Any such leave will be awarded on a case-by-case basis.

Note: Approval for Exam/Study/CPD leave is at the discretion of the line manager, in consultation with HR and in consideration of business needs and current operational demands and is awarded on a case-by-case basis.

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Appendix 2

NATIONAL FRAMEWORK OF QUALIFICATIONS

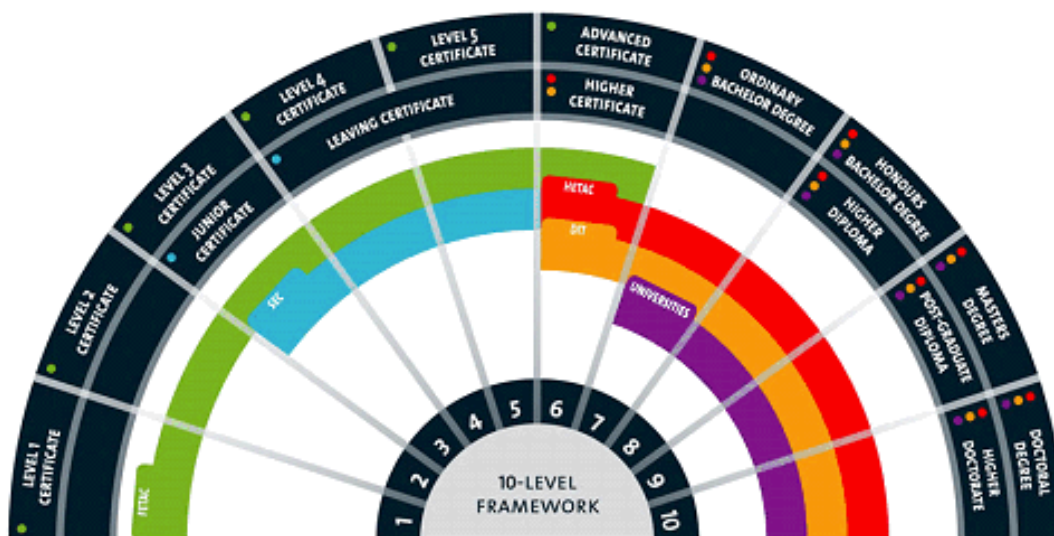
On 6 November 2012, Quality and Qualifications Ireland (QQI) was established as a new integrated agency replacing the Further Education and Training Awards Council, the Higher Education and Training Awards Council, and the National Qualifications Authority of Ireland; and incorporating the functions of the Irish Universities Quality Board.

QQI is responsible for the external quality assurance of further and higher education and training (including English language provision) and validates programmes and makes awards for certain providers in these sectors. QQI is also responsible for the maintenance, development and review of the National Framework of Qualifications (NFQ).



AWARDS IN THE FRAMEWORK

- KEY**
- FETAC - Further Education and Training Awards Council
 - SEC - State Examinations Commission (Department of Education & Science)
 - HETAC - Higher Education and Training Awards Council
 - DIT - Dublin Institute of Technology
 - Universities
 - new Framework awards



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Tuition Assistance Application

SECTION A: PERSONAL DETAILS (BLOCK LETTERS)

Employee First Name	<input type="text"/>	Email	<input type="text"/>
Employee Surname	<input type="text"/>	Line Manager	<input type="text"/>
Mobile Number	<input type="text"/>	Department	<input type="text"/>

This form, must be completed prior to the commencement of any course of study

SECTION B: PROPOSED COURSE DETAILS

Please provide course details

Course Title

Educational Establishment

Duration

<input type="text"/>	<input type="text"/>
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Method of Study- Please tick appropriate box:

Day Release

Night Classes

Distance Learning

Please give details on the following expenses

Annual Course fee €

Total Course fee €

Explain why you think this course will be a benefit to you and to Rockwell:

Explain why you think this course will be a benefit to the employee and to Rockwell
(to be completed by line manager):

SECTION C: AGREEMENT AND APPROVAL

Employee Signature	<input type="text"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Line Manager Signature	<input type="text"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
SLT Signature	<input type="text"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: Please provide supporting documents confirming the offer of a place in the course, as well as the tuition costs associated with the course, along with this completed Application Form.

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