

BPA Human Resources Desk Reference

Academic Degree Training Program

HR Desk Reference: 410-04-01

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1. Purpose & Background

This HR Desk Reference implements BPA HR Directive 410-04: Employee Development and Training.

The Homeland Security Act of 2002 gave Federal agencies the authority to pay for tuition and other costs necessary to train a Federal employee to achieve an academic degree. The primary purpose of the authority is to equip agencies with the ability to close identified knowledge and/or skills gaps linked to specific identified strategic and operational needs by acquiring formal education leading to academic degrees. The authority that allows a Federal agency to pay for or reimburse education costs for such a degree *is not an employee benefit*; rather it must primarily *benefit the agency*. This authority does not allow managers to pay for the costs of an individual employee's academic degree simply for the employee's own personal or professional development, or at the employee's request.

Specifically, the authority requires the knowledge and/or skills gained through formal academic training will accomplish agency goals in its strategic plan, e.g., development of employees into mission critical occupations; or to solve a legitimate *identified* staffing problem, e.g., demonstrated difficulty in hiring particular occupations; or *identified* training need for the organization, e.g., need for knowledge of specific technological advancements). Bonneville Power Administration's (BPA) academic degree training program must be well-planned, comprehensive and coordinated through various BPA functions required to operate the program effectively, such as the Business Line Executives and Program Coordinators, Program Manager in Human Capital Management (HCM) Employee and Organizational Development (NHT) and/or Student Programs (NHQ), and Disbursement Operations (FTD).

Once established and approved, the program must allow eligible federal employees (to include interns on an indefinite appointment) to compete for this valuable opportunity. Selection for training must follow a competitive process that provides employees fair and equitable opportunity for training to obtain the academic degree. The degree must be acquired from an accredited college or university (5 CFR 410.308). Employees must also enter into a Continued Service Agreement (CSA) with BPA prior to starting training to ensure the cost of the employee's degree has a return on the agency's investment (5 CFR 410.309).

The Bonneville Power Administration's Academic Degree Training Program (previously referred to as Tuition Assistance for Academic Degrees – TAAD) was redesigned to comply with both statutory requirements and financial obligations.

Improvements to the program through this Handbook will ensure that BPA has a compliant and structured program that supports BPA's strategic objectives and is maintained through standardized, consistent processes. BPA must demonstrate that expenditure of funds is legal and appropriate, and approval decisions and expenditure of these funds are defensible

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when authorizing this expenditure. BPA must be able to reconstruct actions as required for proper program management, evaluation, and audit.

CSAs are statutorily required and will ensure ratepayer value in return on BPA’s investment on an individual employee’s academic degree. The Handbook reflects the regulation’s intent to make academic degree opportunities competitive and available across the workforce (regular Federal and student employees) following merit system principles.

A. Purpose of the Academic Degree Program Desk Reference:

This handbook is designed to assist managers, supervisors, and human resources professionals to correctly and effectively administer BPA’s academic degree training program. It provides detailed information on:

1. Roles and responsibilities to all participants in the process;
2. Program criteria, processes, and timelines;
3. Program administration, including guidance on strategic planning, budgeting, selecting employees, approving coursework and related costs, processing payments or reimbursements for completed training and monitoring academic progress;
4. Tools to improve the process implementation; and
5. Principles on return on investment through the service commitment.

B. Grandfather clause:

All employees actively participating in BPA’s academic degree training program at the time Personnel Letter (PL) 410-02 was published on December 14, 2012, were “grandfathered” into the current program. It means they were able to continue in the program without having to compete. Any CSA entered into and signed before December 14, 2012, under the prior policy remains in effect for the conditions and service commitment to which all parties agreed. New CSAs executed on or after December 14, 2012, were under the new requirements described in PL 410-02. BPA will identify previous participants (employees in the program prior to this Handbook being published) and determine eligibility as outlined in 5 CFR Part 410. It is important to note that not all employees may meet program requirements to continue academic degree training; as a result, both HCM and hiring managers will work with the employee(s) to identify potential alternatives.

C. Exceptions or exemptions:

Any exceptions or exemptions from the prescriptive elements in this handbook must be fully documented by the business line executive, providing the business rationale and justification, and sent to BPA’s Human Resources Director (HRD) for timely approval. In return, the HRD may coordinate with the Department’s Office of Learning and Workforce Development to ensure program requirements are met.

1.2 Purpose

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A. Legal and Regulatory Basis:

5 USC 41, specifically, §4107, §4108, and §4109 and 5 CFR Part 410 authorizes BPA through the Department of Energy (DOE) to provide employees training to obtain an academic degree when it contributes significantly to meeting an identified BPA training need, e.g., a systemic training need that may be common within or across organizations, resolving specific staffing problems, or accomplishing BPA’s strategic plans and business objectives.

B. Academic Degree Program Usage:

The academic degree training program is part of BPA’s overall coordinated program to provide employees (both student employees and the regular workforce employees) effective education and training to improve performance and accomplish strategic goals. BPA business lines must annually prepare or update an Academic Degree Program Plan (ADPP) that complies with federal law and regulations (5 USC §4107 and 5 CFR 410.308) and identifies the academic degree training needed to accomplish the strategic business needs within their organization (see additional guidance in this handbook under Program Administration, [Business Line Academic Degree Program Plan](#)).

A worksheet to develop the ADPP is in [Appendix A](#). The ADPP identifies specific occupational series that are covered under academic degree training. These occupations along with the academic degrees identified in the plan will be approved for academic degree training. The Plans need to be developed/updated and approved by HCM at least 60 days prior to selecting any employee for enrollment in academic degree training (for specific guidance on HCM approval authority (see Academic Degree Program Responsibilities, [Human Capital Management](#) in this desk reference). The approval process is to ensure that the ADPP is in compliance with federal law and regulations and meets the thresholds listed below.

1. **First threshold:** Only occupations identified on BPA’s current list of mission critical occupations may be included for academic degree training (see worksheet in [Appendix A](#) which contains information on mission critical occupations per BPA’s Workforce Plan). These workforce plans will update regularly to ensure strategic alignment and reflect any changes in BPA’s mission.
2. **Second threshold:** BPA may use the program for the following purposes as long as workforce data is documented and obtained in order to justify usage:
 - a) For students hired into the Pathways Program who are high academic achievers in order to influence their studies in coursework that will benefit BPA once the students are converted to permanent full time employment after graduation.
For example:
 - i) Electrical engineering students in BPA’s Transmission Services for the purpose of ensuring the student’s complete coursework related to the high voltage power industry (DC and AC transmission);

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- ii) Engineering students in communications (electronics), civil and mechanical areas that will bring the technical skills BPA needs to accomplish its mission; or
 - iii) Hard to fill occupations (Office of Personnel Management – OPM, or agency defined).
- b) To develop employees for critical skills that are not readily available in the labor market or where developing current employees may be more cost-effective than recruiting new employees with such skills. Some of these occupations include: contract management, electrical engineer, civil engineer, and mechanical engineer.
- c) To provide employees with career transition and growth opportunities that further BPA’s strategic objectives when the training will significantly contribute to meeting an identified training need or resolve an identified staffing problem. For example:
- i) Technological changes;
 - ii) Program and mission changes; and
 - iii) Organization restructuring (employee redeployment).

1.3 Distinguishing academic degree training from other authorized training

BPA managers and supervisors may provide employees training to improve organizational performance. A full range of options is available to meet organizational and employee developmental needs. Some of these include classroom training, on-the-job training, technology-based training, employees' self-development activities, coaching, mentoring, career development counseling, details, rotational assignments, cross training, and development activities at retreats and conferences. Academic degree training is only one component of BPA’s overall training and development program.

Job-related courses and training events and activities not covered by this desk reference (other than academic degree training) are approved under guidance provided in BPA HR Directive 410-04: Employee Development and Training. Program requirements include determining training needs; creating Individual Development Plans (IDPs); competitively selecting employees, when necessary; establishing continued service obligations; and evaluating training.

Academic degree training, part of BPA’s overall training authority and specifically described in this desk reference, should **only** be used when the objective of the training is to provide significant funding in order for the employee **to obtain an academic degree** to meet a specific staffing, training, or business need. Unlike regular training, academic degree training has specific and unique requirements for competitive selection and establishing an ADPP that must be monitored to ensure employees are making successful progress towards

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program completion. Additionally, a CSA based on a unique calculation that considers the approved curriculum (total credit hours) must be signed by the manager or supervisor, HCM official, and the employee.

1.4 What the program is not

Academic degree training is **not** an employee benefit, entitlement, incentive, or performance award. It is not mandatory, but is a discretionary training tool for BPA management to use to achieve very specific strategic objectives. In regards to student employees under the Pathways Program who are approved for academic degree training, the training is not for the purpose of achieving their personal educational goals, but to obtain a degree that contributes significantly to BPA achieving its strategic business objectives.

Managers may not predicate a student’s enrollment on receiving Academic Degree Training particularly since Pathways students are appointed on the basis of their already being enrolled in an academic institution. Further, managers, supervisors, or other approving officials may not authorize academic degree training for the **sole purpose** of providing an employee an opportunity to: 1) obtain an academic degree/graduate certificate; or 2) qualify for appointment to a particular position where the degree is a basic requirement, e.g., Fishery Biologist, Electrical Engineer.

2. Responsibilities

BPA’s academic degree training program is delegated in order to give business units (Transmission Services, Power Services and Corporate) flexibility to plan, implement and fund the program in a manner that meets their business needs. It places accountability to manage and budget the program on specific roles and responsibilities. Program administration and coordination may be delegated to a program coordinator in a BPA organization and must include collaboration among all individuals and organizations that have the program responsibilities described below. **Timelines and specific instructions to administer the Academic Degree Training Program are contained in Appendix F and must be followed.**

- A. **Executives:** The Deputy Administrator, Chief Operating Officer (COO) and Senior Vice Presidents manage and fund the academic degree training program, through a program coordinator or committee, for their specific corporate organizations or business units. This includes planning, budgeting and approving use of training funds and collaborating with BPA’s HCM for HCM approval of their annual ADPP. Executives provide direction and approve the Academic Degree Program Plan developed by their Business Line Program Coordinators.
- B. **Business Line Program Coordinators:** Executives can delegate responsibility for management coordination of the program within their organization to an individual program coordinator or a committee (program coordinator). The program coordinator

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prepares the annual ADPP for the business line, collaborates with HCM for concurrence, and manages implementation of the plan. Timelines and specific instructions to administer the Academic Degree Training Program are provided in Appendix F and must be followed. Other responsibilities include:

1. Develops the annual Business Line ADPP (for details see section on [Business Line Academic Degree Program Plan](#) under Program Administration in this handbook);
2. Facilitates competitive employee selections, in collaboration with managers and supervisors and HCM, through Training Interest Announcements or Vacancy Announcements, as appropriate;
3. Prepares and posts Training Interest Announcements (sample Training Interest Announcement is provided in Appendix C) or requests HCM to post Vacancy Announcements when academic degree training is associated with recruitment or merit promotion actions (see additional guidance in this desk reference under Program Administration, [Employee Selection](#));
4. Ensures Academic Degree Plans (Parts I and II) and CSAs are properly prepared, reviewed, and signed by selected employees and their managers or supervisors and submits to HCM for review and approval at least 45 days prior to the employee beginning academic degree training;
5. Oversees program operations within their business unit through collaboration with managers and supervisors to ensure employees are making satisfactory academic progress and meeting required academic, performance and conduct standards, or that an employee’s Academic Degree Plan is modified or terminated, when necessary; and
6. Notifies HCM Talent Development & Organizational Effectiveness or Pathways Coordinator, as appropriate, of any changes to an employee’s ADPP. Changes could result in the employee’s disqualification from academic degree training.

C. Managers and supervisors: Managers and supervisors participate with Business Line Program Coordinators in developing the annual ADPP. They identify academic degree training opportunities within their organization and ensure it aligns with the organization’s strategic direction. Managers supervise employee’s participation in academic degree training and are responsible for the following specific tasks:

1. Selects employees for academic degree training;
2. Determines an employee’s work schedule and whether the employee may attend training on duty time or non-duty time (student employees may only attend on non-duty time);
3. In collaboration with employees, develops and modifies individual written Academic Degree Plans which includes calculating the service commitment of the CSA and proper completion and signing of the CSA;

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4. Reviews, signs, and forwards to HCM on a term (semester or quarter) by term basis Part III of the Academic Degree Plan which is submitted after the employee is enrolled in school and identifies the specific courses the employee will take and costs for the upcoming term;
5. Monitors employee's completion of academic courses and expenditure of funds each term (semester or quarter) by reviewing academic transcripts, receipts, and proof of payment and forwarding to HCM for review and employee reimbursement at the end of each academic term;
6. Ensures the employee maintains eligibility and a successful completion record;
7. Monitors and evaluates employees completion of their Academic Degree Plan by including discussions about progress and academic performance with the employee during regular performance discussions required under BPA's performance enhancement program;
8. Suspends or terminate academic degree training when employees fail to meet academic, performance and conduct standards;
9. Notifies HCM Talent Development and Organization Effectiveness or the Pathways Coordinator in NHQ (employees in Pathways) when employees fail to meet academic, performances and conduct standards. Action will be taken to suspend or terminate academic degree training;
10. Monitors employees/students for completion of service commitment under Continued Service Agreements. This includes amending the CSA, as necessary, according to the agreement's provisions, e.g., extending the service commitment for periods of LWOP/non-pay status or changing the service commitment when the employee's/student's academic degree plan is modified or terminated); and
11. Notifies HCM Talent Development and Organization Effectiveness or the Pathways Coordinator in NHQ for Pathways Interns when employees terminate the federal service prior to the end of their continued service commitment.

Timelines and specific instructions to administer the Academic Degree Training Program are contained in Appendix F.

12. **Human Capital Management:** HCM has responsibility for program management and administering certain aspects of the academic degree training program is an integrated effort of both HCM Learning and Development (NHT) and HCM Staffing and Classification (NHQ).
 - a) **HCM Learning and Development (NHT):** Has overall functional responsibility for BPA's training and development program and is responsible for the following:
 - i) Advises executives, managers, supervisors, and employees on the requirements and procedures of academic degree training, including calculating the employee's service commitment to be stated in the CSA;

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- ii) Collaborates with business line coordinators and NHQ's Pathways Coordinator on developing annual Business Line Academic Degree Program Plans and determines HCM concurrence;
- iii) For all employees not enrolled in the Pathways Intern Program, reviews and approves/disapproves documents completed by managers, supervisors and employees to ensure they are properly executed, e.g., Training Interest Announcements, employee Academic Degree Plans, and CSAs. This includes verifying the accuracy of eligible costs on the ADP (with caps applied) and the calculation for the service commitment stated in the CSA;
- iv) Posts Training Interest Announcements on BPA Connection, Training web page when requested by a Business Line Program Coordinator;
- v) Reviews and approves/disapproves on a term (semester or quarter) by term basis Part III of the Academic Degree Plan which is submitted after the employee is enrolled in school and identifies the specific courses the employee will take and costs for the upcoming term;
- vi) Advises executives, managers, and supervisors when changes to an employee's Academic Degree Plan results in the employee being disqualified to continue academic degree training;
- vii) Receives and reviews employees' transcripts each academic term (quarter or semester). Processes for payment the costs to be reimbursed employees for approved training expenses. To be approved for reimbursement, the course/cost must be passed and be within the curriculum and funding limits of the employee's Academic Degree Plan;
- viii) Submits form 2230.06e to Disbursement Operations (FTD) with proper documentation for payment (receipts, proof of payment for class/allowable costs, and proof of passing the class). The form must be signed by both the manager/supervisor and employee. Documentation will include the audit checklist;
- ix) Monitors the status of employees' completion of their Academic Degree Plan (accumulation of completed credit hours and payment of costs) in order to ensure approved curriculum and funding limits are not exceeded;
- x) Enters into Human Resources Management Information System (HRMIS) specific information about coursework completed by employees (student employees and regular workforce employees) as required by Office of Personnel Management (OPM) reporting requirements; and
- xi) Collaborates with NHQ to maintain auditable files for a period of 3 years after employees complete their program and are awarded a degree, or the program is terminated (see Appendix B, Audit Checklist).

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- b) **Talent Acquisition (NHQ):** Has responsibility for managing the Pathways Intern Program which includes student employee recruitment, training, and conversion to permanent competitive service employment. Pathways Interns are eligible for academic degree training and, as such, the Pathways Coordinator is responsible for the following:
- i) Advises executives, managers, supervisors, and employees on the requirements and procedures of academic degree training for student employees in the Pathways Program, including calculating the student employee’s service commitment to be stated in the CSA;
 - ii) Collaborates with business line coordinators and NHT on developing annual Business Line ADPPs and recommends HCM approval;
 - iii) Facilitates posting Vacancy Announcements to recruit Pathways Interns or Training Interest Announcements;
 - iv) Reviews and approves/disapproves documents completed by managers, supervisors and student employees to ensure they are properly executed, e.g., employee Academic Degree Plans and CSAs. This includes verifying the accuracy of eligible costs on the ADP (with caps applied) and the calculation for the service commitment stated in the CSA;
 - v) For Pathways Interns, reviews and approves/disapproves on a term (semester or quarter) basis Part III of the Academic Degree Plan which is submitted after the employee is enrolled in school and identifies the specific courses the employee will take and costs for the upcoming term;
 - vi) Advises executives, managers, and supervisors when changes to an employee’s Academic Degree Plan results in the student employee (Pathways Intern) being disqualified to continue academic degree training;
 - vii) Receives and reviews student employees’ transcripts each academic term (quarter or semester) and processes for payment the costs to be reimbursed student employees for approved training expenses. To be approved for reimbursement, the course/cost must be passed and be within the curriculum and funding limits of the employee’s Academic Degree Plan;
 - viii) Submits form 2230.06e to Disbursement Operations (FTD) with proper documentation for payment (receipts, proof of payment for class/allowable costs, and proof of passing the class). The form must be signed by both the manager/supervisor and employee. Documentation will include the audit checklist;
 - ix) Monitors the status of employee’s completion of their Academic Degree Plan (accumulation of completed credit hours and payment of costs) in order to ensure approved curriculum and funding limits are not exceeded;

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- x) Provides information on coursework completed by student employees, including costs, to NHT for entry into HRMIS; and
 - xi) Collaborates with NHT to maintain auditable files for a period of 3 years after student employees (Pathways Interns) complete their program and are awarded a degree or the program is terminated (See Appendix B, Audit Checklist).
- c) **Integrated Strategy (NHI):** Conducts compliance and program reviews; reports on program effectiveness, compliance, and accountability; and develops, interprets, and revises other guidance on the academic degree training program.
- d) **HR Information Management (NHO):** Monitors employee separations and position changes to determine if there is an active CSA that warrants collection action (i.e., when an employee does not fulfill the terms of the CSA and must repay BPA costs for academic degree training). Notifies Cash and Treasury Management (FTT) in Finance when a repayment action is necessary, giving them the employee name, reason for requiring repayment, and amount to be collected, and notifies the employee through the employee’s supervisor of the collection action, reason for repayment, and amount.
- e) **Employee/Labor Relations and Benefits (NHE):** Advises executives, managers, and supervisors about the requirements and process to suspend or terminate academic degree training when an employee does not meet the academic, performance, or conduct standards established to continue participation in the program.
- D. **Finance:** BPA’s Finance Office disburses funds to pay for approved academic degree training costs; collects overpayment, when necessary; withholds taxes, as necessary; and reviews and approves/disapproves all requests for waiver of reimbursement when an employee must repay costs. The following are the specific responsibilities for certain organizations within Finance:
1. **Disbursement Operations (FTD):** Receives notice from HCM to reimburse employees for allowable costs for academic degree training. Reviews form 2230.06e for proper signatures and appropriate documentation and makes payment in a timely manner. Payment is based on reimbursement, so the employee is accountable for acquiring and maintaining all necessary paperwork associated with reimbursements.
 2. **Cash and Treasury Management (FTT):** Collaborating with HCM Information Management (NHO) and following FTT’s policy and internal procedures on collections, sends letter to employees or former employees who are required to repay BPA training costs. FTT will determine the options/methods for repayment. The letter will notify employees/former employees of the reason for repayment, proposed payroll offset schedule when applicable, and other alternative methods of

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payment. The employee/former employee may make a lump-sum payment via pay.gov. It is FTT’s responsibility to ensure repayment occurs.

- E. **Employees:** Employees are responsible for applying for academic degree training opportunities. If accepted into the program, they are responsible for the following:
1. Develop a written Academic Degree Plan in collaboration with their manager or supervisor to identify required coursework, number of credit hours necessary to obtain the degree, and expected graduation date. The Academic Degree Plan (Parts I and II) must be submitted to HCM at least 45 days prior to the start of training;
 2. Sign a CSA before beginning academic degree training;
 3. Maintain good academic standing and successfully and timely complete their academic degree program;
 4. At the beginning of each academic term (semester or quarter), immediately after enrolling in classes, submit Part III of the Academic Degree Plan to HCM through their supervisor for approval of specific courses and costs for the term;
 5. Within two (2) weeks after the end of each term (quarter or semester), provide a copy of their grade report (transcript) to their manager or supervisor and to HCM Talent Development and Organization Training (NHT), or the HCM Pathways Coordinator if the student employee is in the Pathways Intern Program;
 6. Maintain job performance that is no lower than the fully successful or equivalent level, e.g., “Meets Expectations” or “Successful Performance”. Academic degree training may be suspended or terminated for employees whose performance falls below the fully successful or equivalent level;
 7. Furnish bills/invoices and proof of payment for approved costs under their Academic Degree Plan when requesting reimbursement;
 8. Understand that academic degree training may be income subject to Federal and State income tax and the Federal Insurance Contribution Act (FICA) which obligates BPA to make tax withholdings from employees’ pay. Employees should review “Education Assistance” in IRS Publication 15B for specific tax treatment; and
 9. Complete the service commitment.

3. Program Administration

3.1 Business Line Academic Degree Program Plan (ADPP)

In collaboration with HCM training staff and the Pathways Coordinator, program coordinators for each business unit (Transmission Services, Power Services, and Corporate) annually develop or update their ADPP. The ADPP identifies the academic degree training needed to accomplish strategic business needs. The worksheet in Appendix A must be used to identify the specific job series eligible for academic degree training. The plans must be

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submitted to HCM for review and concurrence at least 60 days prior to selecting any employee for academic degree training. The plans must describe:

- A. The specific purpose for academic degree training and why a particular occupation is eligible under DOE and BPA’s program requirements (see Purpose, Academic Degree Program Usage in this handbook for guidance about how academic degree training is used at BPA);
- B. Covered occupations (title and series) and academic degrees, e.g., Bachelors in Contract Management, Masters in Electrical Engineering;
- C. Number of employees in the program including employees currently in the program as well as those to be selected during the upcoming year;
- D. Annual funding levels budgeted for academic degree training; and
- E. Caps on amounts approved for individual employees, if applicable. Business Lines in collaboration with HCM will determine whether to establish caps and will base their determination on funding available and the value of the training to BPA. Different caps may be identified for specific occupations or degrees. Caps may be per academic year or may be per an individual’s program. For example, a cap of \$7,000 per academic year might apply or a cap of \$20,000 for an individual’s overall academic program might apply depending on program conditions.

3.2 Announcement for Academic Degree Training

Employees must be competitively selected to participate in academic degree training and selection must be consistent with merit system principles (5 USC 2301(b)). Eligibility to participate in academic degree training is based on the employee’s occupation being eligible as described in this Handbook. Competition may be through a Training Interest Announcement or a Vacancy Announcement issued under BPA’s merit promotion program plan depending on the program’s target position after completing training. A Vacancy Announcement issued to recruit candidates for the Pathways Intern Program can be used concurrently to satisfy competitive selection requirements for academic degree training. Employment as a Pathways Intern, however, is not contingent upon the student’s approval for and enrollment in academic degree training.

- A. **Training Interest Announcements:** A Training Interest Announcement is used to solicit interest in academic degree training opportunities when there will be no change in the employee’s grade and pay as a result of the completed training and awarded degree. The announcement is prepared and posted for at least 10 days on BPA Connection by the business unit in collaboration with HCM Talent Development & Organization Effectiveness (NHT). A sample announcement and detailed instructions are provided in Appendix C. The announcement must contain the following:
 - 1. The type of degree or graduate certificate for which the employee will be trained;
 - 2. Purpose of the training;

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3. Who may apply (may be limited to a specific business unit if that will provide sufficient candidates to make a selection, or may be broadened to include all organizations within the business unit or BPA-wide);
4. Criteria that is the basis for the selection decision;
5. Costs to be paid by BPA (e.g., total dollar amount and all expenses expected to be covered, such as tuition, fees, and/or books) and any relevant caps; and
6. Requirement to sign a CSA upon selection.

Selection decisions are documented on the Training Interest Announcement and sent to HCM Talent Development and Organizational Effectiveness (NHT) along with the employee’s completed Academic Degree Plan and CSA. All documents must be sent at least 45 days prior to the when the employee will begin academic degree training.

B. Vacancy Announcements: Vacancy Announcements are used when academic degree training is part of an authorized training agreement or when the employee selected for training will be promoted or placed in a position that will lead to promotion during or after the training is completed. In these circumstances, the announcement is issued and employee selected according to BPA’s merit promotion program plans described for annual employees under PL 335-01, BPA Merit Promotion Plan and Implementation Procedures for Annual Positions, and for hourly employees under PL 335-02, BPA Merit Promotion Plan and Implementation Procedures for Hourly Jobs.

If academic degree training is offered in connection with a recruitment action, such as hiring students into BPA’s Pathways Internship Program, the Vacancy Announcement may be used to concurrently satisfy the competitive selection requirement for the training if sufficient information about the training opportunity is included in the announcement as described below.

HCM Talent Acquisition is responsible for facilitating the posting of vacancy announcements according to their standard operating procedures and delegated authority. If academic degree training will be given to the selectee(s), the vacancy announcement must be posted for at least 10 days and specify the following additional information:

1. The type of degree or graduate certificate for which the employee will be trained;
2. Who may apply;
3. Criteria that is the basis for deciding who will be provided academic degree training (i.e., rating criteria if applicable or other basis for selection decision). However, criteria are not needed **if all who are hired** will be provided the training. In such cases the announcement must state that academic degree training will be provided to all who are hired under the **specific** Vacancy Announcement;
4. Costs to be paid by BPA; and

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5. Requirement to sign a CSA upon selection.

Selection decisions made as a result of merit promotion or recruitment action are documented and processed according to HCM Talent Acquisition’s standard operating procedures. A copy of the selection certificate along with the selectee’s completed Academic Degree Plan and signed CSA are sent to HCM Talent Development & Organization Effectiveness or the Pathways Coordinator for student employees hired under the Pathways Intern Program. All documents must be sent at least 45 days before the employee actually begins academic degree training.

3.3 Employee Academic Degree Plan (ADP)

Each employee approved for academic degree training will have an ADP that must be completed and submitted to HCM 45 days prior to beginning the training program (see Appendix D).

- A. Part I of the ADP shows the following:
 1. Degree or graduate certificate that will be awarded upon completion of academic study;
 2. Total credit hours needed to complete the degree program;
 3. Total credit hours to be funded by BPA (this is needed to calculate the service commitment);
 4. Total dollar amount estimated that BPA will pay towards the employee’s academic study (total amount will be within any caps established in a business line’s annual Academic Degree Program Plan); and
 5. Types of costs to be covered (i.e., tuition, matriculation fees, library/lab services, and/or books). Detailed information on allowable costs is listed in this handbook under *Program Administration, Courses/Allowable Costs – Approval and Processing*.

Part I of the ADP establishes the overall curriculum and funding (degree, total credit hours, total estimated cost, and kinds of costs to be covered) that are approved by BPA for academic degree training. This section is used to approve and process the specific courses and costs, which are submitted on Part III of the ADP for each term (quarter or semester). Each approved course may be reimbursed and must be documented in HRMIS as completed training. Only the specific courses and costs associated with a curriculum and annotated in HRMIS will be approved. If the coursework is not referenced in HRMIS, then it is not sanctioned, approved BPA academic degree training and will not be reimbursable.

- B. Part II of the ADP addresses the calculation to determine the service commitment that will be stated in the CSA. This student executes this Agreement before attending academic degree training (additional guidance on the CSA is shown below).

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- C. Part III is submitted at the beginning of each term (semester or quarter) after the employee has enrolled in the academic institution and the specific courses are identified as well as the costs for the upcoming term. The form is submitted through the employee’s supervisor to HCM which in return will review and approve. Talent Development and Organization Effectiveness (NHT) will review the courses and costs associated with the curriculum for approval. NHT will also review the funding limits of the ADP, except for Pathways Interns. For Pathways Interns, the Pathways Coordinator will review for approval the list of courses and cost.

An executive, manager or supervisor may modify or terminate the ADP for the following reasons:

1. The employee’s curriculum has changed and is no longer aligned with the business lines annual Academic Degree Program Plan. (It is important to remember that the Plan must be approved by HCM. If the curriculum and the Plan do not align, academic degree training may be cancelled); or
2. Funding must be adjusted due to budgetary constraints or funds are no longer available; or
3. The employee does not meet academic, performance or conduct standards.

Changes made to the ADP may require the CSA to be amended.

3.4 Continued Service Agreement (CSA)

Each employee selected for academic degree training must sign a CSA, regardless of the total number of training hours approved and paid for by BPA, giving BPA a return on its investment. The CSA is a written obligation to work for BPA (or DOE) for a specific period of time and must be signed before the employee begins academic degree training. The service commitment begins when the employee completes or terminates his/her ADP. The service commitment for student employees in the Pathways Intern Program begins when the student is converted to career-conditional appointment or term appointment.

- A. **Service Commitment:** The service commitment is generally three (3) times the length of training as shown in chart #1 or it may be a length of time based on the cost of training as shown in chart #2, whichever is longer (see charts on following page). In some rare and unusual circumstances, an executive, manager or supervisor may request the service commitment be 4, 5, or 6 times the length of training. However, this must be justified and concurred by HCM.
- B. **Chart #1:** The length of training is determined by using the academic institution’s contact hours. Contact hours are the number of credit hours assigned to a course(s) times the number of weeks in a term times the number of terms required to complete the degree or graduate certificate. This basis for determining length of training comes from Office of Personnel Management (OPM) guidance. Only the courses approved and reimbursed by BPA are included in the calculation. A sample calculation of the service commitment is shown in the following chart:

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|---|--------------|--|
| | 90 | Total credits for all semesters/quarters |
| Times (×) | <u>12</u> | weeks (one semester or quarter, as applicable) |
| Equals (=) | 1,080 | contact hours |
| | 1,080 | contact hours |
| Divided by (÷) | <u>40</u> | work hours/week (refers to when service commitment begins, 40 hours for full-time employees) |
| Equals (=) | 27 | weeks (round to full week) |
| | 27 | weeks (length of training period) |
| Times (×) | <u>3</u> | (service commitment requirements per 5 USC § 4108)* |
| Equals (=) | 81 | weeks minimum service commitment |
| Equals (=) | 19 | months (81 weeks x 7 days = 567 ÷ 30 days p/mo. = 18.9 months)** |
| <p>* When justified by management and concurred by HCM, this multiplier may be 4, 5, or 6</p> <p>** Show Service Commitment in months (rounded to full month)</p> | | |

C. **Chart #2:** The length of the service commitment when based on the total cost of training is shown in the following chart:

| Training Cost (including travel; excluding salary) | Service Commitment |
|--|--|
| Less than \$8,000 | Use length of training to calculate (see Chart #1 above) |
| \$8,000 - \$15,000 | 12 months |
| \$15,001 - \$25,000 | 18 months |
| \$25,001 - \$35,000 | 24 months |
| Greater than \$35,000 | 30 months |

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D. Amending the Continued Service Agreement: After conversion for students, and after matriculation for employees, while completing the service commitment, an employee has extended periods of leave without pay (LWOP) or other periods of non-pay status that are 30 days or longer (refers to each period of non-pay status, not the cumulative), the CSA must be amended to extend the service commitment by the total time spent in the non-pay status. There are two exceptions. In the cases shown below, time spent in a non-pay status will be fully counted on a day-for-day basis towards the completion of the service commitment:

1. Employees receiving compensation from OWCP for on-the-job injury or illness; and
2. Employees serving in the uniformed services.

BPA will unilaterally amend the CSA when warranted for the following reasons:

- a) As required by applicable laws or regulations;
- b) To change the service completion date and extend the service commitment resulting from periods of leave without pay (LWOP) or other periods during which the employee is in a non-pay status; and
- c) To establish a different service commitment resulting from modifying or terminating the employee’s Academic Degree Plan.

E. Failure to Complete Service Commitment: Employees who voluntarily leave BPA (and DOE) before completing their service commitment will need to repay BPA a prorated amount of the cost of training received for academic degree training (excluding salary and benefits). This includes student employees (Pathways Interns) whose education is discontinued for any purpose and who must be terminated because they are no longer eligible for employment in the Pathways Internship Program or who decline appointment if offered conversion to a career-conditional or term appointment. Employees who are involuntarily separated from Federal service are not required to repay BPA for the period of their service commitment that isn’t completed.

The amount to be repaid is calculated by HCM Internal Operations (NHO) who will notify Cash and Treasury Management (FTT) in Finance of the employee’s name, reason for requiring repayment and amount to be collected. NHO will also notify the employee through the employee’s supervisor of the collection action, reason for repayment, and amount to be collected. Employees will repay a prorated amount of the total training costs (excluding salary and benefits) against the remaining portion of the CSA as follows (calculations are based on calendar days):

1. Determine the daily value for training (stated in the employee’s CSA).
2. Credit the employee for each day of service completed during the service commitment period.
3. Determine the number of days not completed during the service commitment period and multiply that number times the daily value for training.

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4. The amount calculated in #3 is the amount the employee owes to BPA.

Employees who are required to repay BPA for academic degree training may request BPA’s Treasury Manager to waive the repayment requirement in certain compelling circumstances. The employee is responsible for providing the Treasury Manager the reasoning and any supplemental documentation to sustain this compelling reason as articulated in finance regulations. The Treasury Manager only has authority to waive repayment in whole or in part when collection would be against equity and good conscience or not in the best interest of the United States. If repayment is not waived and the employee fails to reimburse BPA for the amount owed, BPA may collect the amount owed using any means allowed by law. If the employee fails to repay the amount within 30 days of separation, the repayment is subject to interest and late charges. Again, any waiver of repayment requests must be submitted to the Treasury Manager for review and approval.

3.5 Courses/Allowable Costs – Approval and Processing

The education an employee receives from participating in the academic degree training program is valuable to both BPA and the employee. Therefore, it’s appropriate for BPA and the employee to share the cost of the employee obtaining the degree. BPA has the discretion to decide if it will pay all or part of the allowable costs associated with an employee’s academic program and decides the overall curriculum and funding limits. Employees or managers should not assume that BPA will cover 100% of the allowable costs. Academic degree training is not an entitlement.

Part I of the Academic Degree Plan (ADP) provides the structure for the individual employee’s coursework and costs for academic degree training. Specifically, it identifies the total credit hours and dollar amount that BPA will fund towards the employee obtaining the academic degree. Any coursework (credits) and cost beyond what is approved by BPA will be borne by the employee. HCM has final authority to determine if a particular course and cost (fee or other cost) is allowable and eligible for reimbursement as covered by the employee’s ADP.

A. **Allowable Costs:** The following are the allowable costs under BPA’s academic degree training program:

1. Tuition (includes course fees) and matriculation fees;*
2. Library and laboratory fees; and
3. Books (rental or purchase).

** Matriculation fees are the mandatory fees all students are required to pay in order to be enrolled as a degree-earning student at a college or university. The amount and kinds of fees included as mandatory may differ from school to school, so fees that are mandatory (matriculation fees) are determined on a case-by-case basis depending on the school attended. Matriculation fees do not include fees the student has incurred based on his/her action or decision, such as parking fees, credit card fees and late fees. Fees the student is*

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able to “opt” out from paying also are not considered matriculation fees. For example, at some schools students may be able to opt out of health services fees.

Materials, supplies, tools and equipment are **not allowable** costs and will not be reimbursed.

Student employees (Pathways Interns) may only attend school on non-duty hours and are shown in leave without pay (LWOP) status when attending classes. Travel costs (i.e., travel and per diem) are not allowable costs for student employees and will not be paid. Management authorized travel, per diem, and housing costs will be reimbursed.

Employees (excludes student employees) may attend training on duty and/or non-duty hours. Managers and supervisors, at their discretion, may approve employees to attend training during duty hours and receive pay (except overtime, holiday, or night differential pay). In exceptional situations, BPA may pay training related travel costs (travel and per diem) for employees (excludes student employees) training outside their commuting area. Manager and supervisors must approve training related travel costs and the decision to do so must be supported by a compelling business need and authorized according to BPA travel policy and requirements.

- B. Processing payment:** BPA will only pay allowable training costs as reimbursement to employees upon submitting copies of bills/invoices and proof of payment, e.g., receipts). Employees will submit form 2230.06e (signed by both manager/supervisor and the employee, with receipts, proof of payment, and transcripts to show proof of passing their classes through their manager or supervisor to HCM Talent Development and Organization Effectiveness, or the Pathways Coordinator if a Pathways Intern.

HCM will review the supporting documents and decide if reimbursement is appropriate based on what are allowable costs and if the specific course and costs were approved on Part III of the ADP. Courses and costs listed on Part III are only approved if they are within the curriculum and funding limits of Part I of the employee’s ADP. HCM will notify Disbursement Operations (FTD) when employee reimbursement is approved and forwards form 2230.06e and attachments to the Accounts Payable – FTD e-mail box. Accounts Payable reviews for proper signatures and receipts and makes payment.

3.6 Monitoring employees’ academic progress

Managers and supervisors are responsible for monitoring their employees’ academic progress and successful completion of the Academic Degree Plan. This includes ensuring that employees are meeting the required academic, performance and conduct standards established to participate in the academic degree training program. The standards are:

- Employees must be in good academic standing as determined by their educational institution;
- Employees must have a current fully successful, or equivalent (e.g., “Meets Expectations” or “Successful Performance”), or higher performance appraisal rating (or be progressing satisfactorily if the employee is a new hire) to be selected for

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academic degree training and must maintain this rating throughout completing their Academic Degree Plan; and

- Certain kinds of misconduct will result in suspension or termination of academic degree training which is decided on a case-by-case basis in consultation with HCM.

Employees must furnish their manager or supervisor a copy of their transcript within 2 weeks after the end of each term (quarter or semester). Managers and supervisors will review the transcript and include discussions about progress and academic performance with employees during their regular performance discussions that occur as part of BPA’s performance management program. The manager or supervisor will send the transcript to Talent Development and Organization Effectiveness (NHT) or to the Pathways Coordinator in NHQ when the employee is a Pathways Intern. The transcript should be sent at the same time the receipts and proof of payment for completed courses are sent requesting employee reimbursement (for additional guidance on processing documentation of completed training see [Courses/Allowable Costs – Approvals and Processing](#), under Program Administration in this Handbook). If transcripts are not provided within the allotted time, reimbursement may be delayed until verification is obtained.

If a manager or supervisor determines that an employee is not meeting the academic, performance or conduct standards required to remain in the academic degree training program, the supervisor must immediately contact an Employee Relations Specialist in HCM. Appropriate action can be taken as described below. The manager or supervisor must notify Talent Development and Organization Effectiveness (NHT), or the Pathways Coordinator in NHQ when the employee is a Pathways Intern, of the action being taken. The specific action to be taken is as follows:

- Employees who for any reason fail or do not complete courses that BPA has approved for payment will be required to personally pay all training costs for those specific courses (i.e., the employee will not be reimbursed costs for those courses).
- Employees who are not in good academic standing and/or who terminate enrollment at their educational institution will be terminated from academic degree training. A supervisor may give an employee placed on academic probation or warning for a specific term (semester or quarter) one term (the following term) to return to good academic standing in lieu of immediately terminating academic degree training. This decision will be made in collaboration with HCM when based on circumstances outside the employee’s control that impact his/her studies, such as illness or a death in the family.
- Employees who have less than a fully successful rating will be suspended from academic degree training and payments of costs until performance returns to fully successful. Employees will have 90 days to improve performance to continue eligibility in the Academic Degree Program. Academic degree training will be terminated if the employee’s performance does not return to fully successful within the 90-day period.

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- A. **Terminating an Employee’s Academic Degree Training:** A manager or supervisor in consultation with HCM Performance Enhancement, and the HCM Pathways Coordinator (if the employee is a student in the Pathways Internship Program), will notify the employee in writing when his/her participation in the academic degree training program is being suspended or terminated. Before notifying the employee, the manager or supervisor should obtain concurrence from the Business Line program coordinator for the program termination action being taken.

The employee notification will include: 1) the reason for suspension or termination; 2) action the employee must take to return to the program, if suspended, e.g., return to fully successful performance if a performance issue; 3) the date the suspension or termination is effective; 4) the impact, e.g., whether or not BPA will pay for courses in progress; 5) that the employee’s CSA will be amended if the program is terminated (see additional guidance in this handbook about amending the CSA under Program Administration, [CSA](#)); and 6) that the service commitment begins with the date of termination. If an employee needs more time to complete his/ her academic studies and is performing satisfactorily academically, Management, in consultation with HCM, may consider adjusting the academic schedule to allow the employee/ student the time needed to complete his / her degree.

3.7 Program Completion

Employees who complete their academic studies and are awarded a degree or graduate certificate will provide their final transcript and a copy of their degree or graduate certificate to their manager or supervisor. The supervisor in return will forward the documents to HCM. Final receipts and proof of payment are to be submitted to HCM through the manager or supervisor within 30 days after completion of their program.

The manager or supervisor congratulates the employee in writing for completion of their academic studies and notifies the employee of the dates of his/her service commitment. The CSA needs to be amended, if required (see additional guidance in this handbook about amending the CSA under Program Administration, [CSA](#)), before the notification is given. A manager who becomes aware that an employee will not complete the service commitment will need to notify HCM Internal Operations.

HCM internal Operations (NHO) will monitor employees’ separations and position changes to determine if there is an active CSA (CSA) that warrants collection action (i.e., when an employee does not fulfill the terms of the CSA and must repay BPA costs for academic degree training) and notifies Cash and Treasury Management (FTT) in Finance when a repayment action is necessary. NHO will provide FTT with the employee’s name, reason for requiring repayment, and amount to be collected (see additional guidance in this handbook on calculating the amount to be repaid under Program Administration, [CSA, and Failure to Complete Service Commitment](#)). NHO also notifies the employee through the employee’s supervisor of the collection action, reason for repayment, and the amount to be repaid. BPA’s Finance organization will determine the options/methods for repayment and will

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process the collection following relevant policy and internal procedures, unless the employee requests a waiver and the BPA Treasury Manager approves it.

HCM Talent Development & Organization Effectiveness documents in HRMIS employees' completed training, and jointly retains with the Pathways Coordinator (NHQ) all program documents in auditable files for a period of three (3) years after employees complete their education and are awarded a degree, or enrollment in the program is terminated (see Appendix B, Audit Checklist).

4. Revision History

| Version Number | Issue Date | Description of Change or Review |
|----------------|------------|---|
| 1.0 | 1/19/2016 | Initial publication. |
| 2.0 | 4/18/2016 | Style, formatting, and grammar changes. |
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Appendix A: Academic Degree Training — Job Series Worksheet

Instructions:

- **Section 1** – Business Line Program Coordinator must complete the worksheet for each proposed target job series, attach any supporting documents, and submit to the Pathways Coordinator or Training Coordinator annually (early spring/late summer).
- **Section 2** – Pathways Coordinator or Training Coordinator & Subject-Matter-Experts will review input and make recommendations to the Human Resource Director.
- **Section 3** – Human Resource Director will approve or disapprove the proposed target job series for the Academic Degree Training program.

Section 1 – To be completed by Business Line Program Coordinator

Proposed target OPM job series & job title:
 (do not enter “99” student trainee series)

Checklist completed by:

Date:

Title 5 USC 4107 (a) Academic Degree Training – An agency may select and assign an employee to academic degree training and may pay or reimburse the costs of academic degree training from appropriated or other available funds if such training addresses specific criteria:

1. ___ (yes or no) Does the proposed target job series contribute significantly to meeting an identified agency training need? If “yes,” briefly describe agency training need that would be met:
2. ___ (yes or no) Does the proposed target job series contribute significantly to resolving an identified agency staff problem? If “yes,” briefly describe agency staffing problem that would be met:
3. ___ (yes or no) Does the proposed target job series contribute significantly to accomplishing goals in the strategic plan of the agency? If “yes,” briefly describe how it would accomplish goals:

BPA’s Mission Critical Occupations (from 2015 Workforce Plan)

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Identify with an “x” if the proposed target job series is listed below:

- Contract Specialists, GS-1102
- Dispatchers, BB-5407
- Environmental Protection Specialists, GS-0028
- Field Electrical/Electronics Engineer, GS-0850/0855
- IT Specialists (INFOSEC), GS-2210
- Occupational Safety and Health Managers, GS-0018
- Physical Scientists, GS-1301
- Biological Scientists, GS-0401
- Substation Operators, BB-5407
- TF District and Regional Managers, GS-1601
- Senior Executive Service, ES-340

Business Line staffing analysis

4. (yes or no) Is the proposed target job series one in which BPA is experiencing a shortage in or anticipates a succession planning need? If “yes,” briefly explain the shortage or anticipated succession planning need:

5. (yes or no) Does the proposed target job series address a special organizational requirement (diversity goals, geographic location, special assignment, safety, compliance, etc.)? If “yes,” briefly describe the special organizational requirement:

Optional: Business Line may attach supporting documentation.

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Proposed target OPM job series & job title:

Section 2 – To be completed by Student Employment & Education Program Coordinator or Training Coordinator & Subject-Matter-Experts

1. ___ (yes or no) Is the intent of Title 5 USC 4107 (a) Academic Degree Training met? Notes:

2. ___ (yes or no) Is the proposed target job series in DOE’s list of MCO? Notes:

3. ___ (yes or no) Is the proposed target job series in BPA’s list of Priority Occupations? Notes:

4. ___ (yes or no) Does the proposed target job series meet a BPA shortage, succession planning need, or a special organizational need? Notes:

Based on Title 5 USC 4107 (b) Academic Degree Training:

5. ___ (yes or no) Is the proposed target job series consistent with merit system principles and takes into consideration the need to maintain a balanced workforce in which women, members of racial and ethnic minority groups, and persons with disabilities are appropriately represented? Notes:

6. ___ (yes or no) Is the proposed target job series consistent with merit system principles and takes into consideration the need to provide employees effective education and training to improve organizational and individual performance? Notes:

7. ___ (yes or no) Is the proposed target job series and training for the sole purpose of providing an employee an opportunity to obtain an academic degree or qualify for appointment to a particular position for which the academic degree is a basis requirement? Notes:

Checklist reviewed by:

Date:

Proposed recommendation:

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Proposed target OPM job series & job title:

Proposed Recommendation (transfer from Section 2):

Section 3 – To be completed by Human Resource Director

Check one:

I approve the above recommendation.

I approve of the above recommendation with the following amendments:

I do not approve of the above recommendation for the following reasons:

BPA Human Resource Director

Date

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Appendix B — Academic Degree Plan Audit Checklist

Name, Program

| Completed: | Task: | Comments: |
|------------|---|-----------|
| | 1. Business line Academic Degree Program Plan was completed and reviewed/approved by the NHT Training Coordinator or the NHQ Pathways Coordinator, as appropriate. (Plan should be updated every year.) | |
| | 2. Student's position classification is consistent with those listed on the mission critical list. | |
| | 3. Manager has provided justification for the student that they are eligible for the academic degree training program. | |
| | 4. The ADP is completely filled out. All classes for the degree are listed in an attachment to the ADP. | |
| | 5. Student signed the CSA document and the proper service period was calculated. | |
| | 6. The classes taken for the current term (quarter or semester) are listed on the ADP. | |
| | 7. All signatures on the ADP are legible and have been dated prior to term (quarter or semester) starting. | |

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| Completed: | Task: | Comments: |
|------------|---|-----------|
| | 8. Tuition caps (if applicable) are properly applied so it is consistent with other students. | |
| | 9. Total costs paid for academic degree training will be less than or equal to the amount approved in the ADP. | |
| | 10. Proper procedures are followed for processing the tuition payments. | |
| | 11. Reconciled the student's ADP part III with the transcript received from the student at the end of the term (quarter or semester). | |
| | 12. Reviewed the school's website or verified with them what the mandatory fees are in case there has been a change from the prior year. | |
| | 13. Adequate documentation (receipts and proof of payment) have been provided by the student to support reimbursement of eligible/approved costs. | |
| | 14. Grades for the classes taken were received and meet mandatory minimum requirements. | |
| | 15. Proper reimbursement documents are prepared. | |

Signature: _____

Date: _____

Signature: _____

Date: _____

| | | |
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Appendix C — Sample Training Interest Announcement

BONNEVILLE POWER ADMINISTRATION

TRAINING OPPORTUNITY TUITION ASSISTANCE FOR ACADEMIC DEGREE INTEREST ANNOUNCEMENT – *(insert number)*

OPENS: *(insert date)*

CLOSES: *(insert date)*

TRAINING OPPORTUNITY IN *(Insert the name of the organization with the training):*

Announcing a *(Insert the degree or graduate certificate and field; e.g., Masters Degree in Electrical Engineering - Wind Integration.)* **Training Opportunity.**

Purpose: *(Provide business reason for providing TAAD training. Address one of the criteria listed in Personnel Letter (PL) 410-02 Chapter 3, section IV.A.)*

Note: This training is not subject to BPA’s merit promotion plan since it is **not** for the specific purpose of preparing an employee for a position that will result in promotion.

WHO MAY APPLY: Current permanent BPA employees in *(Insert the area of consideration – organizational unit as described in PL 410-02 Chapter 3, section IX.A.)*

SELECTION CRITERIA:

(Identify qualities/competencies, experience, performance and/or other factors to be assessed in making a selection decision.)

COSTS BPA WILL PAY:

(Identify the organization that will pay and the costs to be covered, such as tuition, matriculation fees, books, etc. See section V. of PL 410-02 Chapter 3 for allowable costs. Costs covered are at management discretion.)

CONTINUED SERVICE AGREEMENT:

Prior to beginning training, the selected employee will be required to sign an agreement to continue to work for BPA for a period of service based on the length of the



training period.

PL 410-02 Chapter 3 has information about how the service commitment will be calculated.

| | | | | |
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HOW TO APPLY:

Complete a brief memorandum of interest that addresses how you meet the criteria listed above under "Selection Criteria."

Submit your memorandum, along with the completed supervisory acknowledgment statement below by close of business on *(insert day of the week and date)* to: *(insert name and routing of contact in the business unit)*.

**

SUPERVISOR'S ACKNOWLEDGEMENT

INTEREST ANNOUNCEMENT # _____ *(insert number)*

I acknowledge that _____ has requested consideration for this training opportunity.

I understand that this interest announcement requires pre-approval from me and I approve this training for this applicant.

I am willing to allow this employee to attend training (check all that apply):

- During duty time
- During non-duty time
- Using annual leave
- Using leave without pay (LWOP)

I understand all training costs, as described in the interest announcement, will be approved and funded by *(Insert appropriate approval and funding authority, such as Senior Vice President for Transmission Services.)*

Supervisor's Signature: _____ Date: _____

Supervisor's Title: _____ Routing: _____

| | | | | | |
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Appendix D—Academic Degree Plan for BPA Employees

ACADEMIC DEGREE PLAN FOR BPA EMPLOYEES Part I

Privacy Act Information. Authority: This information is being collected under the authority of 5 USC § 4115, a provision of The Government Employees Training Act. **Purpose and Use:** Used in the administration of the Federal Training Program to document approval of training for entry into the Human Resources Management Information System (HRMIS). **Disclosure:** Personal information provided in this application package is given on a voluntary basis. Failure to provide this information, however, may result in ineligibility for participation in training programs.

| | | | |
|--|---|---|---|
| Name: | | Duty Location: | |
| Occupational title/series/grade: | | Organization: | |
| Degree/Graduate Certificate to be awarded: | | List of Courses Required for Graduation (<i>Attach copy of school document, such as DARS audit report from PSU</i>) | |
| Name and address of School: | Initial Registration Date: Expected Graduation Date: | Training Location: (<i>city/state</i>) | Check student status: <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Half-time |

Business Need for Training: (*Check the appropriate box(es) to indicate how this training meets the regulatory criteria for Academic Degree Training. Describe how this need is covered by the Business Line Academic Degree Program Plan*)

Regulatory Criteria: Training significantly contributes to, meeting an identified BPA training need; resolving an identified BPA staffing problem; and/or accomplishes goals in BPA’s strategic plan.

Business Line Academic Degree Program Plan (ADPP): Training is covered by the ADPP as follows:

| | | | | | |
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CURRICULUM AND COSTS

*BPA may pay **all or part** of the allowable costs associated with an employee obtaining an academic degree or graduate certificate. Part I of this Academic Degree Plan (ADP) provides the structure for the coursework the employee will complete to obtain the academic degree by showing the total credit hours and total funds approved by BPA towards the employee’s academic study. Coursework (credits) and cost beyond what is approved by BPA that is required to obtain the degree will be borne by the employee.*

TOTAL APPROVED CREDIT HOURS

This block identifies, 1) the total credit hours the employee needs to obtain the degree, and 2) the total credit hours approved for payment by BPA (within the limits of total approved costs).

1. Total credit hours required to complete academic degree requirements:
2. Total credit hours approved for payment by BPA, not to exceed total approved costs:

TOTAL APPROVED COSTS

| ITEM | AMOUNT | *MATRICULATION FEES (List specific fees and amount to be covered. See PL 410-02 for definition of matriculation fees.) |
|--|--------|---|
| a. Tuition and course fees (all semesters/quarters) | \$ | |
| b. Books (all semesters/quarters) | \$ | |
| c. Matriculation Fees* (all semesters/quarters) | \$ | |
| d. Library/Lab Services (all semesters/quarters) | \$ | |
| e. TOTAL APPROVED, BUDGETED COSTS for DEGREE (<i>not to exceed applicable caps, if any</i>): | \$ | |

EMPLOYEE SIGNATURE

I understand that any changes to this Academic Degree Plan require prior approval by the authorizing official to ensure that my academic studies continue to be eligible under BPA’s Academic Degree Training Program.

Employee Signature

Date

| | | |
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APPROVALS

(Subsequent changes to this Academic Degree Plan may be made as described in PL 410-02 Chapters 1 and 2.)

1a. Immediate Supervisor (*Name and Title*):

1b. Signature _____

1c. Date _____

2a. Authorizing Official (Senior VP, COO, Deputy Administrator or his/her delegate) (*Name and Title*):

2b. Signature _____

2c. Date _____

3a. Human Capital Management (Human Resources Officer or his/her delegate) (*Name and Title*):

3b. Signature _____

3c. Date _____

MODIFICATION

Check box if this is a modification of the original or a modified Academic Degree Plan.

The original plan was approved (*show date*): _____

Modified plan(s) approved on (*show all dates plan has been modified/approved*): _____

**ACADEMIC DEGREE PLAN FOR BPA EMPLOYEES
Part II**

CONTINUED SERVICE AGREEMENT

– SERVICE COMMITMENT CALCULATION –

The service commitment is generally three (3) times the length of training or may be a length of time based on the cost of training as shown in the chart in #2 below, whichever is longer. In some rare and unusual circumstances, an executive, manager or supervisor may request the service commitment be 4, 5, or 6 times the length of training, but must be justified and concurred to by HCM.

| | | | | | |
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1. Service commitment based on calculating length of training, including classes for all semesters/terms/quarters to obtain the degree: (Length of training is determined using an academic institution's contact hours. Contact hours are the number of credit hours assigned to a course times the number of weeks in a term times the number of terms required to complete the degree or graduate certificate.) Calculate as follows:

a. Determine in weeks the length of training:

Total credit hours for all courses approved for payment by BPA:

Number of weeks in the term (quarter or semester): _____ **x**

Total contact hours: _____ **=**

Divided by work hours/week (40 hours for full-time employee)*: _____ **÷**

Length of training _____ **=** _____ **weeks (rounded to full week)**

b. Multiply the weeks from a. above (length of training) by the service commitment multiplier (3, 4, 5 or 6):

Service Commitment (in months, rounded to full month)

***This refers to work hours per week when the service commitment begins after program completion, e.g., conversion to competitive service if a Pathways Intern).**

2. Service commitment based on total cost of training: (from chart below)

| Training Cost (including travel; excluding salary) | Service Commitment |
|---|--|
| Less than \$8,000 | Use length of training to calculate (see #1 above) |
| \$8,000 - \$15,000 | 12 months |
| \$15,001 - \$25,000 | 18 months |
| \$25,001 - \$35,000 | 24 months |
| Greater than \$35,000 | 30 months |

3. SERVICE COMMITMENT TO BE SHOWN IN CSA: (from 1 or 2 above, whichever is longer):

(in months, rounded to full month)

| | | | | | |
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**ACADEMIC DEGREE PLAN FOR BPA EMPLOYEES
Part III**

SHOW COURSES ENROLLED IN FOR THE SPECIFIC TERM (semester or quarter) – insert additional rows, if needed. *(HCM has final authority to determine if the specific coursework is covered by the curriculum and funding limits of the employee’s ADP and approved for payment.)*

TERM/YEAR: *(Example – show as Winter Quarter/2013)*

| | <u>Course Title</u> <i>(Only include courses to be paid by BPA.)</i> | <u>Course Dates</u> <i>(mm/yy – mm/yy)</i> | <u>Credit Hours</u> | <u>Classroom Hours</u> <i>(xx AM or PM to xx AM or PM)</i> | <u>Tuition Cost*</u> | <u>Book Cost*</u> | <u>Course Fees*</u> |
|---|---|---|---------------------|---|----------------------|-------------------|---------------------------------|
| | | | | | | | *Only show amount BPA will pay. |
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |
| 6. | | | | | | | |
| 7. | | | | | | | |
| 8. | | | | | | | |
| 9. | | | | | | | |
| 10. | | | | | | | |
| Show Matriculation Fees: <i>(refer to PL 410-02, Academic Degree Training Program for costs allowed as matriculation fees.)</i> | | | | | | | |

Reviewed and approved by:

1. Immediate Supervisor *(Name and Title):*

Signature _____

Date _____

2. Human Capital Management (Human Resources Officer or his/her delegate) *(Name and Title):*

Signature _____

Date _____



Appendix E — Continued Service Agreement

CONTINUED SERVICE AGREEMENT

Academic Degree Training Program, PL 410-02

1. This Continued Service Agreement (Agreement) is an agreement between the Bonneville Power Administration (BPA) and/or successor organizations and the employee (referred to as “I” or “me”). I, *(insert name)*, have read and understand this Agreement and the provisions of Personnel Letter (PL) No. 410-02 that describe continued service agreements for TAAD training and the basis for determining the service commitment.

LENGTH OF SERVICE

2. I agree that in return for receiving \$*(insert total amount)* in financial assistance for my attendance at *(identify TAAD training institution)*, I will complete a *(insert total required service period; e.g., 18 months)* service period at BPA. The required service period starts on *(date)* and terminates on *(date)*.
 - a. I agree that the total potential liability for the required service period is \$*(insert training cost)*.
 - b. This amount has a daily (calendar day) value of \$*(insert amount)*.
3. I agree that if I voluntarily leave BPA/Department of Energy (DOE), including entering the service of another Federal agency after completing the training program described and prior to completing my required service period, I am liable to BPA for the value of any service days (calendar days) not completed. The total potential liability amount will be reduced by the daily value identified in 2.a. for each day I was a BPA employee after my completion of the training program.
4. I agree that my required service period with BPA is still enforceable if my Academic Degree Plan is terminated and that this Agreement will be amended to establish the appropriate required service period. If I voluntarily leave BPA or I am separated due to ineligibility for continued employment, I am liable to BPA for the value of any service days (calendar days) not completed. The total potential liability amount will be reduced by the daily value identified in 2.a. for each day I was a BPA employee after the termination of the training program.

TERMINATION OF ACADEMIC DEGREE PLAN

5. I agree that BPA can terminate my Academic Degree Plan if I do not meet the performance, conduct and academic standards described in PL 410-02 (Chapter 2 or 3, as applicable) or if BPA determines funding is not available.



REIMBURSEMENT

- 6. I agree that I must complete my required service period with BPA or other DOE departmental element.
- 7. I agree that any amount that may be due BPA as a result of failure on my part to meet the terms of this Agreement will be repaid to BPA and may be withheld from any monies owed to me by BPA or may be recovered by other methods as allowed by law.
- 8. If I am determined to be indebted to BPA, I have the right to file a request for a waiver of any indebtedness that I may have to BPA under this service agreement based on a demonstration by me that BPA’s recovery of such indebtedness, in whole or in part, would be against equity and good conscience or against the public interest.
The filing of such a waiver request will not stay the operation of BPA’s debt collection procedures. I must file the request with my immediate supervisor.

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AMENDMENT

9. BPA will unilaterally amend this Agreement for the following reasons:
- As required by applicable laws or regulations;
 - To extend the service period resulting from periods of leave without pay (LWOP) or other periods during which I am not in a pay status (exception: absence due to uniformed service or compensable injury are creditable towards the required service period); and
 - To establish a different service period resulting from modifying or terminating my Academic Degree Plan.
10. I acknowledge that this Agreement does not in any way commit BPA to continue my employment or payment of any training.

This Continued Service Agreement is not valid unless signed by all parties:

I agree to the terms and conditions identified in this Agreement:

| | | |
|-----------------------|-----------|------|
| Employee Name (Print) | Signature | Date |
| | | |

By my signature below I certify that I have delegated authority to enter into this Agreement on behalf of BPA:

| | | |
|------------------------------------|-----------|------|
| Supervisor or Manager Name (Print) | Signature | Date |
| | | |

By my signature below I certify that I have reviewed this Agreement and verify it meets the terms and conditions of PL 410-02:

| | | |
|--------------------------------------|-----------|------|
| HCM Authorized Employee Name (Print) | Signature | Date |
| | | |

| | | | | | |
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Appendix F—Academic Degree Training Program Semester Timeline

This timeline is applicable to employees and students newly selected for the Academic Degree Training Program; refer to the program handbook for complete information.

Academic Degree Plan (ADP) Submission Process

| Completed by | Tasks | *Deadline |
|------------------------------------|--|--|
| Business Line Coordinator | <ol style="list-style-type: none"> 1. Collaborate with each business unit (Transmission Services, Power Services, and Corporate) annually to develop or update their Academic Degree Program Plan (ADPP). 2. Complete Section 1 of the Academic Degree Training Job Series Worksheet & attach optional business line documentation. 3. Submit worksheet & optional documentation to Pathways or Training Coordinator by deadline. | First (1 st) Friday in June |
| Pathways or Training Coordinator | <ol style="list-style-type: none"> 1. Review Section 1 & complete Section 2 of the Academic Degree Training Job Series Worksheet. 2. Submit recommendation in Section 3 to the Human Resource Director (HRD) by deadline. | Second (2 nd) Friday in June |
| HR Director | <ol style="list-style-type: none"> 1. In Section 3, document decision regarding job series eligibility for the Academic Degree Training program. If job series is eligible, continue with process. | Last Friday in June |
| Employee/Student & Work Supervisor | <ol style="list-style-type: none"> 1. Review Academic Degree Training Handbook. 2. Complete Academic Degree Plan (ADP) Parts I, II & III; include information from the remainder of the academic program through the expected graduation date. Sign/date “Employee” & “Immediate Supervisor” signature blocks. 3. Obtain “Authorizing Official” signature. 4. Complete the Continued Service Agreement (CSA); sign/date “Employee” & “Supervisor or Manager” signature blocks. 5. Submit ADP & CSA to Pathways or Training Coordinator by deadline. | Four (4) weeks before class starts |

| | | | | | |
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| | | |
|---|---|-----------------------------------|
| Pathways Coordinator, Training Coordinator, and/or Subject-Matter-Experts | <ol style="list-style-type: none"> 1. Review ADP & CSA for completeness & accuracy. 2. Verify the ADP's total tuition amount is less than or equal to any applicable caps. 3. Verify that the CSA commitment period is accurately calculated & consistent with the ADP. 4. Complete the Academic Degree Plan (ADP) Audit Checklist with NHQ or NHT manager; both sign upon completion. 5. Submit ADP, CSA, and ADP Audit Checklist to HR Director for review & approval by deadline. | Two (2) weeks before class starts |
| HR Director (or delegate) | <ol style="list-style-type: none"> 1. Review ADP, CSA & ADP Audit Checklist, request any clarification from Pathways or Training Coordinator. 2. To approve, sign "Human Capital Management" and CSA "HCM Authorized Employee" signature blocks. 3. Return ADP, CSA, and ADP Audit Checklist to Pathways or Training Coordinator by deadline. | One (1) week before class starts |
| Pathways or Training Coordinator | <ol style="list-style-type: none"> 1. File all final documents & documentation. 2. Distribute copies of final ADP & CSA to Employee/Student & Work Supervisor | One (1) week after HRD signs |
| Employee/Student | <ol style="list-style-type: none"> 1. Start term. | Employee attends classes |

Reimbursement Process

| Completed by | Tasks | *Deadline |
|------------------------------------|--|---|
| Work Supervisor & Employee/Student | <ol style="list-style-type: none"> 1. Obtain unofficial transcript with posted final grades. 2. Complete BPA F 2230.06e "Claim for Reimbursement for Expenditures on Official Business." 3. Sign "Employee" and "Manager" blocks. 4. Complete any additional forms & prepare additional information. 5. Submit transcript, BPA F 2230.06e & any additional documents to Pathways or Training Coordinator by deadline. | Two (2) weeks after grades are posted |
| Pathways or Training Coordinator | <ol style="list-style-type: none"> 1. Review reimbursement form, transcript & any additional documents for completeness & accuracy. 2. Request clarification or additional info from Employee/Student or Work Supervisor. | Third (3 rd) week after grades are posted |

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| | | |
|----------------------------------|--|---|
| HR Director (or delegate) | <ol style="list-style-type: none"> 3. Submit to HR Director for approval by deadline. 4. Request clarification from Pathways or Training Coordinator. 5. Sign “Authorizing Certifying Officer” block. 6. Return to Pathways or Training Coordinator by deadline. | |
| Pathways or Training Coordinator | <ol style="list-style-type: none"> 1. Submit reimbursement documentation to Disbursement. | Fourth (4 th) week after grades are posted |
| Disbursement | <ol style="list-style-type: none"> 1. Process reimbursement to Employee/Student. | Processed within 5-7 days from date documents are submitted |

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