SECTION 1 OVERVIEW

Per WSU Administrative Services Guideline Financial Awards for College Degrees and Professional Credentials, employees should discuss their plans to attain college degrees and professional credentials with department leadership before undertaking any actions. This form is a planning document that will guide the individual and his/her supervisor in administering this guideline (see Appendix A). Adjustments to development activities or goals may necessitate completion of a new Planning Form.

SECTION 2 OVERVIEW

This form may also be used as a planning document for the Administrative Services Guideline Degree/Credential Completion Assistance. This section of the Planning Form will aid the individual and his/her supervisor in discussing potential financial assistance.

SECTION 1, Financial Awards for College Degrees and Professional Credentials

To be completed by Employee:

Development activity/goal that is to be pursued (examples include Bachelors degree, certification with a professional organization, etc.):

_________________________________________________________________________________________
_________________________________________________________________________________________

To be completed by Supervisor after discussion of development activity/goal with Employee:

This development activity/goal is:

Check one:

[ ] Career Path -- Planned future steps in the progression of an employee's profession or field of work at Weber State University.

[ ] Non-Career Path -- Planned future steps that are not consistent with the progression of an employee's profession or field of work at Weber State University.

This development activity/goal:

Check one:

[ ] Is a college degree or college certificate or Level 1 or Level 2 Credential.
   (If this box is checked, then (1) circle the area on Appendix A that indicates the type of degree or credential the employee is pursuing; (2) circle the area on Appendix A that indicates the corresponding type of award; and (3) sign this form on the last page.)

[ ] Is NOT a college degree/certificate or Level 1 or Level 2 Credential.
   (If this box is checked, then sign this form on the last page.)

NOTE: Credentials or certifications that don't meet the criteria noted in Levels 1 and 2 may be recognized...
by the supervisor through a Spot Award.

SECTION 2, Degree/Credential Completion Assistance

To be completed by Employee:

Degree/credential completion assistance requested (financial assistance may not be used to pay for lodging, transportation, or meals, or anything that can be returned after completion of the course).

________________________________________________________________________________________
________________________________________________________________________________________

To be completed by Supervisor after discussion of request with Employee:

Check one:

[ ] The individual’s request meets a specific departmental need.

[ ] The individual’s request does NOT meet a specific departmental need.

Check one:

[ ] The individual’s request is career path -- Planned future steps in the progression of an employee's profession or field of work at Weber State University.

[ ] The individual’s request is NOT career path -- Planned future steps that are not consistent with the progression of an employee's profession or field of work at Weber State University.

Check one:

[ ] The individual’s PREPs reflect satisfactory performance.

[ ] The individual’s PREPs DO NOT reflect satisfactory performance.

Check one:

[ ] The individual’s length of service at the University is
  [ ] at least six months (for a certificate)
  [ ] at least one year for a degree or
  [ ] meets the requirements as defined by the Department.

[ ] The individual’s length of service is NOT adequate.
This request:

Check one:

[ ] Is approved as described below (include specifics, i.e., C or better grade is required; successful completion of certification is required; timeframe for completion; etc.):

_____________________________________________________________________________
_____________________________________________________________________________

[ ] Is NOT approved (include specifics regarding the denial):

_____________________________________________________________________________
_____________________________________________________________________________

_____________________________________________________________________________

Signatures of Agreement

__________________________________________     ______________________________

Employee                                                              Date

__________________________________________     ______________________________

Supervisor                                                              Date
Appendix A
College Degree or Professional Credential Planning Form

Directions:
(1) Circle the area below that indicates the type of degree or credential the employee is pursuing.
(2) Circle the area below that indicates the corresponding type of award that should be received upon completion.
(3) Sign the form.
(4) Give the employee a copy of the form and keep the original form for future reference.

<table>
<thead>
<tr>
<th>College/University Degrees</th>
<th>Type of Degree</th>
<th>Comments</th>
<th>Type of Award</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-Year College Certificate</td>
<td>Career path</td>
<td>Base salary increase</td>
<td>$150</td>
<td></td>
</tr>
<tr>
<td>Associates Degree/Two-Year College Certificate OR an additional (second) Bachelors Degree or Graduate Degree</td>
<td>General education and/or career path</td>
<td>Base salary increase</td>
<td>$300</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-career path</td>
<td>One-time payment</td>
<td>$300</td>
<td></td>
</tr>
<tr>
<td>Bachelors Degree</td>
<td>Career path</td>
<td>Base salary increase</td>
<td>$500</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-career path</td>
<td>One-time payment</td>
<td>$500</td>
<td></td>
</tr>
<tr>
<td>Graduate Degree</td>
<td>Career path</td>
<td>Base salary increase</td>
<td>$500</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-career path</td>
<td>One-time payment</td>
<td>$500</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional Credentials</th>
<th>Type of Credentials</th>
<th>Comments</th>
<th>Type of Award</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>Requires certification through substantial education (i.e., 4-year degree), experience, and testing</td>
<td>Career path</td>
<td>Base salary increase</td>
<td>$500</td>
</tr>
<tr>
<td></td>
<td>Examples are attached.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 2</td>
<td>Requires certification through some amount of education, experience, and testing</td>
<td>Career path</td>
<td>Base salary increase</td>
<td>$300</td>
</tr>
<tr>
<td></td>
<td>Examples are attached.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Signatures of Agreement

__________________________________________     ______________________________
Employee                                                              Date

__________________________________________     ______________________________
Supervisor                                                              Date
<table>
<thead>
<tr>
<th>Type of Credential</th>
<th>Education</th>
<th>Experience</th>
<th>Testing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified Public Accountant (CPA)</td>
<td>Masters Degree, generally in accounting</td>
<td>At least 1000 hours of work experience with a CPA</td>
<td>Pass exam that has 4 sections (financial, tax, business law, and audit). Each section takes around 4 hours to complete. After passing each section, you then need to pass a Utah State Rules exam and then also take an ethics exam.</td>
</tr>
</tbody>
</table>
| Professional Engineer                    | 4-year degree from an accredited school of engineering | 4 years experience being employed by a PE. | o Pass 8 hour Fundamentals of Engineering exam  
|                                           |           |                                                                             | o Pass 8 hour Professional Engineers exam                                |
| Certified Purchasing Manager             | 3 years professional purchasing/supply management experience and at least a four-year degree from an accredited institution or 5 years professional purchasing/supply management experience | Pass 4-hour exam which includes 4 parts                                  |
| Journeyman Plumber OR Electrician       | Completion of 2 year trade school and 4 years experience OR 8 years experience | Pass a competency exam consisting of 1- 4 hour practical and 1- 4 hour written |
| Master Electrician                       | N/A       | 8 years experience as a journeyman                                           | Pass a 6 hour written exam                                               |
| Certified Facilities Executive           | 7 years of experience in the top two levels of management at a public assembly facility and be a graduate of a four-year college or university. Additional public assembly facility experience may be substituted year-for-year for the educational requirement. | Pass written essay, 4-hour examination, and oral interview               |

**Note:** Certifications differ from certificate programs because certifications include an experience component. Certificate programs, on the other hand, award certificates once a course of study has been completed and do not require previous work experience.