

## **Tuition Assistance Progress**

### **Data Audit and Analysis of the County's Tuition's Assistance Program**

#### **Overview:**

One of the key benefits when being hired for a job is the term "tuition assistance". Many companies and even with different branches of all government levels have the tuition programs to provide incentives for job and career growth for individuals both short and long term [1] [4]. To sum it up, it is highly recommended for anyone who wants to pursue their own dreams to apply this benefit as it will build a foundation for their future goals.

However, when people had applied their tuition benefits and have been offered for the program, there were discrepancies in terms of whether the funds have been allocated appropriately or being misused by the program requirements. Even so, some tuition benefits may not need to be reported if it is under the \$5,250 cap per IRS tax requirements, however, it can be a policy violation if a employee later withdrew because the course is not relevant for them, or because they do have the right skills and knowledge that would benefit for their job [2] [3]. This can cause budget and logistical problems for the HR (Human Resources) management who coordinates this program which can be a downturn for the institution who needs to manage their money wisely for other resources without having to spend wasteful amounts if the program does not seem to work out because of mis-management and with unethical practices that could railroad their values in jeopardy for employees and the company.

While this is not meant to place negatively in this topic, it is meant to provide fairness and transparency to continue reaching the employee's goals of their dream choice, but also maintaining their budget balance in a more ethical manner without falling into their traps. This project will demonstrate the benefits as well the strengths and improvements needed to continue striving for the most-popular employee program.

#### **Goal:**

To keep track of their progress in the tuition assistance program, including goals that each applicant wants to achieve on their career goals, job requirements, or for their own interests - in an effort to study about the county's initiatives to have a more educated and ethical workforce.

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#### **Questions to Consider?**

- **Basics of the Program**
  - What is the total enrollment by each degree level (AA, Bachelors, Masters', Doctorate, Non-Degrees)?
  - Identify the different types of majors in which they are enrolled with.
- **Choosing of School**
  - Did they choose in-county or in or out of state?
    - How many schools are all applicants for this program?
    - Which type of schools did they attend to
      - 2-year college (Community College)
      - 4-year college (Universities)
      - Graduate and Professional Schools
        - Business (MBA)
        - Law (JD, LLM)
        - Pharmacy
        - Medical
        - Dentist
  - Identify the full and part time applicants by Cost.
    - Calculate the part or full time tuition in each institution by
      - In-county
      - In-state
      - Out of state
      - If not specified - general fees
- **Skills and Course Requirements**
  - Were the applicant(s) choose the course for which they are applying because of
    - Job requirements as specified by the training?
    - Career incentives in which they want to pursue for their growth?
    - Learned for their own benefit/curiosity?
  - Course Topics
    - ***Does the course have a prerequisite requirement or not?***
    - Is the course best suited for their skills or occupation?
- **Funding**
  - Per IRS Requirements, tax-exempt status can be used in tuition assistance if below the \$5,250 cap threshold.
    - How many applicants have met the tax-exempt requirements?
    - How many applicants do not meet the tax-exempt requirements?
  - Were the funding sources being processed?
    - Do they meet their eligibility requirements by
      - Major
      - Course Description

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**Links:**

**[1] Tuition Reimbursement for Employees. *Indeed.***

<https://www.indeed.com/hire/c/info/tuition-reimbursement>

**[2] Employers offered educational assistance programs can help pay for college. *IRS - Internal Revenue Service.***

<https://www.irs.gov/newsroom/employer-offered-educational-assistance-programs-can-help-pay-for-college#:~:text=Under%20current%20law%2C%20this%20option,%245%2C250%20per%20employee%20per%20year.>

**[3]: TIGTA Critiques IRS Tuition Assistance Program (2005). *Tax Notes.***

<https://www.taxnotes.com/research/federal/other-documents/treasury-reports/tigta-critiques-irs-tuition-assistance-program/yh82>

**[4] Tuition Assistance Info (*Montgomery County, MD*)**

<https://www.montgomerycountymd.gov/HR/CareerDevelopment/TuitionAssistance.html>

**[5] Data:**

[https://data.montgomerycountymd.gov/Education/Tuition-Assistance/p7z5-tjrz/about\\_data](https://data.montgomerycountymd.gov/Education/Tuition-Assistance/p7z5-tjrz/about_data)