



The University of Texas at Austin
Texas Executive Education
McCombs School of Business



REIMBURSEMENT KIT



Introduction	3
Building Your Case	4
Identify Decision Maker(s)	4
Ask Questions	5
Showcase Need and Illustrate Benefits	6
Justify Your Case.....	7
Sample Justification Letter	7
Details on Coursework.....	8
Obtaining Credit	9
Proof of Completion.....	9
CEU and CPE Credits	9
University Credit	10
Employer’s Tuition Reimbursement Program.....	10
Estimated Costs & Payment	11
Have Questions?	12

INTRODUCTION

We're often asked about how to best approach your employer for learning and development support. This kit includes a few curated tips and supporting materials to consider as you build a case for advancing your career through coursework.



WHAT YOU'LL LEARN

- Tips to Build Your Case
- Sample Justification Letter
- Credit Available
- Cost and Payment
- How to Contact Us

BUILDING YOUR CASE

Before you approach your employer, make sure you are prepared to build your case for your organization to cover the cost of your program. Making the ask is the hardest part, but with these tools success is right around the corner.



1.

IDENTIFY DECISION MAKER(S)

Before you even put pen to paper, consider the approval process and who in your organization will be responsible for the decision to reimburse you. This could be your direct supervisor, HR, L&D (Learning and Development) department, or another stakeholder. Knowing who will be receiving your request helps you cater your message to the right audience.

2.

ASK QUESTIONS

Ask your manager or company's HR, L&D (Learning and Development), or business unit if the company provides reimbursement for professional development. Ask all the necessary questions upfront, considering things like:

What do I need to prepare in advance for approval?

What is the necessary timing of a request for reimbursement?

What types of programs/courses are eligible for reimbursement?

Has anyone else in the organization done a program like this before?

How often is this reimbursement offered?

Do I need proof of completion or official credit?

3.

SHOWCASE NEED AND ILLUSTRATE BENEFITS

Your employer may already be aware of your strengths and your potential for development in your role within the organization, as well as the challenges you face. Now it's your responsibility to show how and why your selected program delivers a solution:

- ▶ Provide details about the curriculum.

- ▶ Correlate these key takeaways with your specific development needs.

- ▶ Align your education goals with KPIs set by your manager or department.

- ▶ Highlight what attracted you to the program and how you plan to leverage your experience for both personal development and the organization's benefit.

- ▶ Showcase why Texas Executive Education fits the bill: whether its credibility, stature of the university, faculty, or curriculum.

- ▶ Be sure to highlight any helpful assets related to your program such as survey results, templates, or case studies.

4.

JUSTIFY YOUR CASE

Now that you have established the who, what, and where, you can begin the process of making your ask for the time and cost. The section below includes resources you may need to support your request.

Use one of the customizable templates as a starting point to help demonstrate the value of the program for your organization. You can print it as a letter, or send it as an email.

Dear Mr. Smith,

I would like your approval to attend the **Refining Your Leadership Style** course scheduled on **October 6-8, 2021**. This program will offer me real world experience and the tools needed to dramatically improve the services we deliver and how we work internally.

This class takes place at the McCombs School of Business at the University of Texas at Austin. It will include lectures, small group exercises, and networking events as well as a McCombs School of Business certificate of completion.

Topics will include:

- Networking
- Team Building
- Leadership Skills
- Effective Communications

After the program, I will be able to share tangible learnings with our whole team. Additionally, these sessions will lead to increased focus on strategies to grow our business and/or contribute to the profitability of the company. The takeaways will also improve my skills and advance my career at **QWERTY Company**.

After completion of the program, I'm excited to hit the ground running to apply our principles of **strong leadership, excellent teamwork and effective communication**.

The total cost to attend this program is detailed below:

- Program Registration: **\$4,450.00**
- Travel: **\$400.00**
- Hotel: **\$600.00**
- Meals: **\$100.00** **Breakfast and lunch during sessions included in Registration Fee
- TOTAL: **\$5,550.00**

[You can learn more about the program here.](#)

Thanks for taking the time to review this request. I look forward to talking to you about it.

Regards,

Joe Johnson

DETAILS ON COURSEWORK

When speaking with your manager, you can share important details that are located on the coursework page on the [Texas Executive Education website](#). This is a great resource to share with your manager. You can use the **bullet points** outlined in the *Benefits* section to help aid your discussion about the specifics of the course.



OBTAINING CREDIT

PROOF OF COMPLETION

After finishing the in-person, virtual (synchronous or self-paced) course, you will receive a certificate of completion. Upon request, we can provide additional documentation if needed. This is a way to prove to your employer that you have attended and successfully completed the course. Your organization can verify your attendance with this documentation as well.



CEU AND CPE CREDITS

In the portfolio of Open Enrollment classes, we have different credit options available:

- CEU (Continuing Education Units)
- CPE (Continuing Professional Education) Credit
- University Credit

CEU

Participants earn CEUs for this course. For every 1 hour of course time, you receive .10 CEU. Each course page lists how many credits are awarded. A certificate of completion will be presented from Texas Executive Education.

CPE

Participants requiring CPE credit will need to request a certificate of completion to include CPE credit instead of CEU credits. For every 1 hour of course time, you receive 1 CPE credit.

UNIVERSITY CREDIT

Many companies and organizations provide educational benefits and financial assistance towards professional development programs that offer university credit. If you are a veteran, our classes may also be covered under your educational benefits if taken for university credit.

Most courses offered by Texas Executive Education can qualify for transferable university credit hours, and admission to The University of Texas at Austin is *not required*. University credits are made available through UT Austin University Extension.

For a nominal additional fee of \$350 participants will receive undergraduate course credit(s) upon completion of the program, which will include a graded final paper, a letter grade, and a transcript. Please note that course credits are available at the undergraduate level only and may not always transfer to another university or program.

Please contact us as soon as you complete your registration if your employer requires university credit. You can learn more on our website.

EMPLOYER'S TUITION REIMBURSEMENT PROGRAM

Many organizations have a dollar limit on the amount of learning or development they will pay for annually, and at times this limit is based on part of the tax code. As such some companies offer Employer's Tuition Reimbursement. We recommend you check with your L&D or HR department for more details on education development assistance and if you may make use of this credit for the Texas Executive Education courses you wish to enroll in.

Please note that most organizations require you to get university credit and a final grade from each course to get reimbursed. Through Texas Executive Education, you will need to opt-in to get university credit for a nominal fee. Please see the University Credit section above for more information.



SHRM

Texas Executive Education is a certified SHRM (Society for Human Resource Management) Provider.



ESTIMATED COSTS AND PAYMENT

To understand the costs associated with your program, you will need to consider if travel is required.

Living in Austin: If you live in Austin, you will want to keep in mind the program costs are inclusive of your parking fees, breakfast, and lunch.

Traveling to Austin: If you travel to Austin, you should explore additional travel related expenses, including meals outside of program meals, flight, rental, and hotel. You may want to check with your employer if you have a per diem rate to follow.

HAVE QUESTIONS?

Did we miss something? Do you need additional assistance? Please feel free to reach out to us directly with any questions or for additional support.



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Texas Executive Education programs at the University of Texas at Austin are designed to help expand professional toolkits and strengthen leadership and management skills. With over 40 courses in 9 concentrations, Texas Executive Education offerings are led by faculty that have been researching, studying, and applying best practices in the field for decades. [Learn More.](#)