

Professional Development Assistance Program (PDAP) Policy

Applicability: All Employees of Sempra Energy and the Sempra Energy Companies (U.S. Only)

Last revision date: 04/15/2020 | All employees must comply with the [Full Policy](#)



Policy at a Glance



Policy Overview

The Professional Development Assistance Program (PDAP) encourages and supports all U.S. based active, regular employees who pursue higher education in areas considered to be an asset to both the employee and Sempra Energy or the Sempra Companies ("the Company"). Under the policy and benefit, the Company approves reimbursement for coursework towards degrees and certificates when the application meets the criteria set forth below in the full policy.



What's prohibited

The following expenses are not eligible for reimbursement:

- Lodging, transportation or meals
- Fees that are not mandatory
- Equipment purchases such as calculators, laptops, or other more permanent equipment



Be cautious and take it slow

Employees participating in the PDAP program are expected to maintain satisfactory performance of their regular work responsibilities. To the extent performance declines, eligibility for this benefit may be reconsidered and suspended until performance returns to a satisfactory level. Non-degree courses required to develop a job-related skill, as well as seminars and conferences, are paid directly by the employee's department. Participation in PDAP does not guarantee advancement. When job openings occur, the most competitive candidate is considered for advancement or change in assignment.



What requires pre-approval

The employee must submit for approval to the PDAP processing center, a list of courses to be taken in the upcoming semester/term. Applications should be submitted prior to the start of the term but will be accepted up to 30 days after the course(s) start date. The Application is online and may be found in **My Info** under **Benefits** and then **Additional Benefits Links – Educational Reimbursement**.

Please note that submission is not a guarantee of approval. A separate application must be completed for each semester/term. Once an application is entered into the system, the system sends a request for approval to the supervisor of record.



What's okay

The following courses/programs may be eligible for reimbursement: Associate degree, Bachelor's degree, Master's degree, professional certificate programs and individual language classes.

The following expenses associated with approved courses/certificate programs may be eligible for reimbursement:

- Tuition
- Mandatory Registration Fees
- Required Books and Required Software
- Mandatory Supplies
- Campus Parking Fees

Have Questions?



[Policy Owner](#)

policymanagement@sempra.com

Have Something to Report?



www.SempraEthics.com

United States: 800-793-7723

Mexico: 001-770-582-5249

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Responsible Dept.: Human Resources

Effective Date: 10/26/2005

Contact: [Policy Owner](#)

Revision Date: 04/15/2020



Policy

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Eligibility

All U.S. based active, regular, full-time employees are eligible for PDAP benefits from the date of hire. Regular, part-time employees are eligible after twelve months with the Company. Employees who become disabled or require protected leave while enrolled in an approved course should discuss their situation with their Human Resources Department Representative or the PDAP program administrator to determine eligibility.

General

1. Employees participating in the PDAP program are expected to maintain satisfactory performance of their regular work responsibilities. To the extent performance declines, eligibility for this benefit may be reconsidered and suspended until performance returns to a satisfactory level.
2. Non-degree courses required to develop a job-related skill, as well as seminars and conferences, are paid directly by the employee's department.
3. Participation in PDAP does not guarantee advancement. When job openings occur, the most competitive candidate is considered for advancement or change in assignment.

Course/Program Guidelines

The following courses/programs may be eligible for reimbursement under PDAP:

- Associate's degree
- Bachelor's degree
- Master's degree
- Professional certificate programs
- Individual language classes taken at an institution that meets accreditation guidelines. International institutions are not eligible.

The degree or certificate program must relate to the business of the Company but does not have to relate to the employee's current job.

The following courses/programs are not eligible for reimbursement under PDAP:

- Doctoral level programs, including law degrees (i.e., Juris Doctor).
- Exam/test fees (i.e., PMP, GRE, GMAT), or preparation courses for exams
- Challenge exams/prior learning assessments
- Classes that do not relate to the business of the Company, unless they are part of a degree program that does relate to the business of the Company, for example, sports or recreational classes.

Course/Program Limitations

1. PDAP is limited to programs and courses that will enhance an employee's ability to do current or prospective jobs, improve skills required for the current job or provide skills necessary for a job that the employee can reasonably aspire to within the organization.

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2. PDAP is limited to classes given outside working hours at a college, junior college or university that is regionally accredited. Online courses may be included, if they are equivalent to college-level courses and have the appropriate accreditation.
3. Classes which are not part of a degree or certificate program and/or do not enhance an employee's ability to perform their current job may be paid for by the employee's department if part of a development plan for the employee. Employees are encouraged to explore these development opportunities with their manager.
4. In order to receive full reimbursement (up to the limits of this Policy) the employee must achieve a grade of "C" or better ("C-" is not acceptable) for undergraduate courses and "B" or better ("B-" is not acceptable) for graduate courses. Passing grades on pass/fail courses meet the minimum requirements.



Approval Procedure

The employee must submit for approval to the PDAP processing center, a list of courses to be taken in the upcoming semester/term. The Application is online and may be found in **My Info** under **Benefits** and then **Additional Benefit Links – Educational Reimbursement**. Applications should be submitted prior to the start of the term, but will be accepted up to 30 days after the course(s) start date.

Please note that submission is not a guarantee of approval. A separate application must be completed for each semester/term (i.e., only classes that have the same starting and ending dates may be entered on a single application). Once an application is entered into the system, the system sends a request for approval to the supervisor of record.



Reimbursements

1. PDAP provided reimbursement for the following expenses associated with approved courses/certificate programs:
 - Mandatory registration fees
 - Tuition
 - Required books and required software
 - Lab fees, including mandatory supplies (mandatory supplies include expendable supplies that are used only for that class or lab, and do not include calculators or other more permanent equipment such as laptops)
 - Campus parking fees
2. The following expenses are not reimbursable:
 - Lodging, transportation or meals
 - Fees that are not mandatory
3. Process for reimbursement: Within 90 days of completing the course(s), employees must submit
 - Reimbursement Request Online Form
 - Copy of the official grade report or completion certificate
 - Verification of course start and end date
 - Deferral Documentation (if applicable)
 - Copy of itemized receipts as proof of payment for registration, tuition, books, laboratory fees and parking fees. (PDAP funding does not cover equipment purchases.)

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Submission may be made to the third-party program administrator, EdAssist, by uploading documents to their portal, or faxing them to 855-687-7636 using the cover sheet printed from the portal. To access the EdAssist PDAP portal, log in to **My Info** under **Benefits** and then **Additional Benefit Links – Educational Reimbursement**. Note: Keep copies of all paperwork for your files.

4. Amount of Reimbursement: Reimbursement is made for actual expenses up to a maximum of \$5,250 per year for full-time employees and \$800 per year for part-time employees. When financial aid is received from other sources (e.g., Veteran Administration benefits), the Company provides reimbursement of the employee's actual cost after other financial aid is applied.
5. Timing of Requests for Reimbursements: Reimbursement requests received after December 1 will be paid out in the following year and applied to that year's annual maximum.
6. If the course is taken through an institution that offers deferred payment programs, such as National University or University of LaVerne, supporting documentation must be submitted with the reimbursement application form and other items.



Taxes

Internal Revenue Code section 127 permits an employee to exclude from her/his taxable income a maximum of \$5,250 of educational assistance furnished pursuant to the PDAP during a calendar year. California law conforms to the Internal Revenue Code. Other states' laws vary as to the treatment of reimbursements pursuant to a section 127 educational assistance program; therefore, the state taxability of PDAP reimbursements for employees in other states will be addressed on a case-by-case basis.



Definitions

Sempra Energy Company/Sempra Company – A subsidiary or other entity as to which Sempra Energy has majority ownership and control.



Information Retention Guidance

For guidance as to the appropriate retention period for information related to this policy, please refer to the [Information Management Policy](#).



Help is a Click Away

You may raise questions or concerns about compliance or ethics issues by visiting our anonymous Sempra Energy Ethics & Compliance Helpline website at www.SempraEthics.com or by calling one of the Ethics & Compliance Helplines below.



Employee Helpline

United States: 800-793-7723

Mexico: 001-770-582-5249