

Education Benefit Maturity Assessment

Use this rubric to assess how ready your education benefits program is to serve as a strategic driver for organizational talent and a career mobility benefit for your frontline workers.

Maturity Levels

1. **Bottom Floor:** This is the legacy “tuition reimbursement” approach straight out of 2005. Offerings are focused on corporate workers and fail to serve the majority of the workforce.
2. **Expanded Access:** This level is marked by the evolution in funding mechanisms, including a payment infrastructure that removes up-front investment with “direct pay” services that supports a “benefits for most” mentality.
3. **Employee Value Proposition:** You’ve moved from checking the benefits box to offering education programs that are a critical part of the employee experience. This is debt-free development at scale with the goal of building talent pipelines to support business strategy.
4. **Career Intelligence:** Your program shifts from one-size-fits-all solutions to a data-enabled career mobility engine. You apply your deep understanding of your employees as well as the needs of your organization to foster career advancement, improve retention and drive outcomes.
5. **Ecosystem of Opportunity:** Now you’re creating a renewable labor market with skills that benefit employees, the organization, and your communities.

Across these maturity levels, you must measure progress within five key dimensions:

- **Choice.** This dimension focuses on the breadth and optionality of programs offered to employees in alignment with business needs, economic opportunity and community benefit.
- **Funding.** This dimension details the financial requirements within a program, from limited funding availability to robust, debt-free support and loan repayment options.
- **Experience.** This dimension measures the supporting elements that boost the effectiveness and impact of education programs, such as coaching, technology, and financial tools.
- **Access.** This dimension explores program eligibility along with barriers employees may face as they seek to develop through education programs
- **Impact.** This dimension highlights the use of data to measure the value of education programs as well as to determine the impact on organizational strategy, direction and decision-making.

Dimension	Level 1: Bottom Floor	Level 2: Expanded Access	Level 3: Employee Value Proposition	Level 4: Career Intelligence	Level 5: Ecosystem of Opportunity
Choice	Basic access to education benefits from any institution	Expands to include varied education partners.	Includes a network of preferred partners and advanced degrees	Supports advanced skills and career growth	Focuses on career growth for both internal and external opportunities
Access	Available to salaried workers	Available to all employees, including part-time and frontline	Expands eligibility to include dependents	Removes barriers like approvals and co-pays	Offers flexible, barrier-free access with support for marginalized groups
Funding	Limited funding, often capped at \$5,250	Scholarships and debt-free programs for career-related courses	Higher contributions and access to multiple funding sources	No caps, full debt-free programs, and employer loan contributions	Comprehensive support, including financial coaching and loan repayment
Experience	Basic support with FAQs and reimbursement process	Leverages learning partners and basic employee support	Provides coaching and tailored guidance to improve career outcomes	Multi-modal coaching and data-driven support for career growth	Integrated experience across learning, career guidance, and financial tools
Impact	Basic metrics on program participation	Focus on improving program engagement through data	Tracks outcomes to refine and adapt programs	Measures ROI based on retention and brand impact	Provides detailed impact reports, economic contributions, and talent mobility