



HUCTW EDUCATION FUND APPLICATION GUIDELINES



In 1989, the University and HUCTW Education and Career Development Negotiations Table spent a great deal of time discussing the institutional as well as personal benefits of support staff pursuing educational interests. We worked together to set up a fund which would go toward assistance for several different educational and career development needs. The Education Fund is designed to address those needs, as well as to increase the opportunities for support staff to pursue further education. We believe that the fund will help to incorporate education into a broader view of what career development means for support staff and how it fits into plans for our own lives.

Education Fund Amount

In the first HUCTW-Harvard agreement the Education Fund was \$25,000 per fiscal year. We are very happy to report that as a result of negotiations between the Union and the University, the Education Fund has increased to **\$110,000** for this academic year (**Fall '09 – Summer '10**).

Eligibility

The following must be met in order to be eligible for an Education Fund award:

- 1) You must be part of the HUCTW bargaining unit.
- 2) The course must fit the award criteria.

Award Criteria

The Education Fund primarily covers courses not eligible for reimbursement under the University Tuition Assistants Program (TAP). Courses covered by the education fund include:

- 1) a test preparation course (*for example: a GRE prep course at Kaplan*)
- 2) a conference/seminar (*the reimbursement will only consider the cost of tuition, not transportation, room or board*)
- 3) any other course that is not eligible for TAP (*for example: you are auditing a course, taking a course at an institution that does not offer a degree or certificate such as a cooking course at an adult learning centers, taking a course for a professional accreditation or paying membership fees in a professional association. Please note that fitness courses, and courses offered at Harvard are not eligible for reimbursement*)

The Education Fund and TAP

All graduate or undergraduate courses taken for credit towards a degree are reimbursed through TAP and not the Education Fund. The only circumstances under which TAP eligible courses will be considered for an Education fund award are :

- 1) You have not yet passed your orientation and review period.
- 2) You did not receive a passing grade for the course.
- 3) You have “tapped out” or in other words, you have exhausted your \$5250 per calendar year TAP limit. Please note that you must completely use your TAP allowance before applying to the Education Fund. In order to prove you have exhausted your funding for the year please include a copy of the “Explanation of Tuition Claim Action” you receive from Crosby along with your TAP reimbursement.
- 4) You are approaching your \$5250 limit and therefore your course costs will be reimbursed at less than 90%. You are eligible to receive a reimbursement of up to 50% for the remainder of your costs not covered by TAP. If you plan to apply for reimbursement from both TAP and the Education Fund for the same course, please send a copy of your TAP application (the same form you send to Crosby) to the HUCTW when submitting your application to Crosby. Do not fill out a separate Education Fund application. Only fill out an Education Fund application if your course is not eligible for TAP, or if no portion of the course you are applying for is being reimbursed by TAP.

For a list of all the changes to the Harvard Tuition Assistance Plan (TAP) for HUCTW members please visit:
http://harvie.harvard.edu/docroot/doc-lib/100_Benefits/750_Tuition_Assistance/Tuition%20Assistance%20Plan%20Changes%20for%20HUCTW.doc

Application Procedure

HUCTW members are eligible for an award for three courses per academic year (September-August).

The deadlines for application: **Spring Semester: June 10th,**
Summer Semester: September 10th
Fall Semester: January 25th

You must apply to the application deadline closest to the date of the completion of the course you wish to have reimbursed. If the course you are taking is more than a semester long you will be eligible to apply for the award only upon completion of the course.

Fill out the entire application form. Your application must include the following information to be considered complete:

- 1) course description (photocopy from the course catalog is fine)
- 2) tuition information--this must include **both**:
 - a) receipt of payment or similar payment documentation, AND
 - b) itemization which shows the cost of the course for which you are seeking reimbursement (can be a photocopy from the catalog of cost per credit or per course, or itemization which is shown on the receipt).
- 3) grade or completion document. (A printout of an unofficial transcript from the internet is fine. If a program does not give out grades proof of completing the course such as a copy of the certificate or a letter from the instructor attesting the student completed the course will be considered proof of completion.)
- 4) Proof of TAP Reimbursement- If your course is eligible for a TAP reimbursement, please provide a copy of the "Explanation of Tuition Claim Action" you received from Crosby along with your TAP reimbursement.

All materials must be submitted (via U.S. mail, University Mail or by fax) to:

HUCTW Education Fund
15 Mount Auburn St,
Cambridge MA 02138
Fax # 617-661-9617

Please note that your application will not be processed until it is complete.

Confirmation of Application Receipt

Soon after the application deadline we will send email messages to all applicants confirming receipt of their applications. This email is sent to your Harvard email account. If you have another address that you would like us to use, please note it on the application. Additionally, if you do not receive an email from the Education Fund within a month after the application deadline, please contact us to ensure we received your application.

Amount of Awards

The amount of an award will be based upon the cost to the applicant of tuition for the course. All eligible applicants will receive a reimbursement of up to 50% of tuition, less TAP or other scholarships. We encourage everyone who is eligible to apply.

Selection Process

Applications will be reviewed by a joint committee composed of HUCTW and University representatives who are not eligible for an award themselves.

Notification of the Award

All applicants will be notified in writing whether or not they have received an award, as well as the amount of the award. Notification will be via email 8 to 10 weeks after the application deadline or as soon as the Selection Committee can make its determinations of the awards.

Payment of the Award

Awards are delivered in your Harvard paycheck, are taxable as extra compensation, and the tax due will be withheld at the time of reimbursement. You should see your award in your paycheck within two weeks of when you were notified of your award.

For further information regarding the Education Fund you can email us at: huctw.edfund@huctw.org or call the HUCTW office at 617-661-8289.