



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

The Fund was \$25,000 per fiscal year for the three years of our first Agreement. We are very happy to report that as a result of negotiations between the Union and the University, the Education Fund has increased to **\$100,000** for this academic year (**Fall '07 – Summer '08**).

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 one of the categories described below.

Award Criteria/Application Categories

You may only apply for an award for one course per semester. In our most recent round of negotiations we made significant changes to the Harvard Tuition Assistance Plan (TAP). For a list of these changes please visit:

<http://harvie.harvard.edu/learning/educationassistance/pdf/TuitionAssistancePlan-HUCTW.pdf>

As a result of these changes, the Education Fund will now primarily be used to cover courses not eligible for reimbursement under TAP. Starting with the fall 2007 semester, all graduate or undergraduate courses taken for credit will be 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:

- a) You have exhausted your \$5250 per year TAP limit
- b) You have not yet passed your orientation and review period.
- c) You did not receive a passing grade for the course

The other types of courses eligible for the Education fund include:

- 1) a test preparation course (for example: a GRE prep course at the Kaplan)
- 2) a conference/seminar (the reimbursement will only consider the cost of tuition, not transportation, room nor 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.)

Application Procedure

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 not available at the time you submit your application, it can be submitted when it becomes available).

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

All materials must be submitted to the Selection Committee: HUCTW Education Fund Committee, 15 Mt. Auburn Street, Cambridge, MA 02138. Awards are delivered in your Harvard paycheck, are taxable as extra compensation, and the tax due will be withheld at the time of reimbursement.

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 insure we received your application.

Amount of Awards and TAP eligible courses

You are eligible for an award for one course per semester. The amount of an award will be based upon the cost to the applicant of tuition for the course. All eligible applicants will receive reimbursement of 50% of tuition, (less TAP or other scholarships) . We sincerely encourage everyone who is eligible to apply.

As outlined previously you may not apply to the Education Fund for any course for which you are applying to TAP. The only circumstances under which TAP eligible courses will be considered for an Education Fund award are: you have not passed your orientation and review period yet, and thus are ineligible for TAP, you did not receive a passing grade for the course or you have exhausted your \$5250 per year TAP limit. If you are approaching your \$5250 limit and therefore your course costs will be reimbursed at less than 90%, your information will be automatically forwarded to HUCTW and will be paid at 50% of the remaining costs. Please do not send a separate application to HUCTW for a course for which you have applied to TAP. 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.

Selection Process

Applications will be reviewed by a joint committee composed of HUCTW and University representatives who are not eligible for an award themselves. Support staff are eligible for an award for one course in each of three semesters: Fall, Spring and Summer. If the course you are taking is more than a semester long you will be eligible to apply for the award upon completion of the course.

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 will be paid on a reimbursement basis. Recipients must present evidence of completion of their course in order to be reimbursed. Send either:

- 1) a photocopy of an official transcript or other document showing grade, OR
- 2) a photocopy of certificate or other document indicating completion. (In cases where grades are not awarded an email from the instructor sent to the huctw.edfund@huctw.org is acceptable.)

Submit grades (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 call within 15 minutes after faxing to confirm receipt)

PLEASE NOTE: *Education Fund awards are considered compensation by the federal government and therefore must be taxed as income according to federal regulations.*

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**.