

EDUCATION FUND FREQUENTLY ASKED QUESTIONS

On June 1, 2000, the Northern California Chapter, NECA adopted an education fund exclusively for its permanent members. Following are answers to frequently asked questions:

What is the Education Fund?

The education fund is a credit to each permanent member based on their percentage of dues paid to the Chapter in the previous year. For example, each year the Chapter's Board of Directors will set aside a certain dollar amount in an education fund. Each permanent member's credit is determined by their percentage of the total dues paid to the Chapter during the payroll period of November through October. Each permanent Chapter member will receive a minimum credit of \$500 per year. Credits, if unused, expire at the end of each year.

What is the purpose of an Education Fund?

The education fund was created as an incentive for permanent members to participate in educational and industry events. With expiring annual credits, companies may be motivated to send their employees to Chapter sponsored educational programs, the annual NECA Convention, and other events relative to the industry. The goal is for every permanent member to participate in NECA events.

How can my credits be used?

Credits may be used to offset the costs of attending Chapter sponsored educational programs. Credits may also be used for attendance at NECA events, such as the annual NECA convention, including registration fees (including text and materials), transportation (i.e., coach airfare, bus, train and rental car), and hotel costs. Meals shall be reimbursed up to \$50 per day, excluding alcohol. Entertainment, recreation, tips and other incidentals shall not be reimbursed.

Are new members eligible to participate?

Upon acceptance by the Chapter's Board of Directors, a new permanent member shall receive the \$500 minimum, prorated from the date of acceptance.

How will I know what my credits are and how is reimbursement handled?

At the beginning of the year the Chapter shall issue a statement of available credits to each permanent member. The Chapter will handle reimbursement requests consistent with its existing expense policy. An education fund reimbursement request form will be provided to each permanent member and reimbursement issued to the member company upon completion of the form and submission of original receipts. As credits are used, a statement of remaining credits will be provided.

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EDUCATION FUND POLICY

The union electrical industry is built upon a foundation of highly qualified field and management personnel. For NECA to be effective, involvement and training are key elements. In response to this, some NECA chapters have adopted an annual education fund whereby a portion of dues is allocated to each member for attendance at industry-related and NECA sponsored educational programs and events. The Northern California Chapter is pleased to offer an education fund program to its permanent members.

EXCLUSIVENESS

This program shall be under the exclusive direction and control of the Northern California Chapter, NECA (Chapter) and its permanent members.

BENEFITS

The Education fund creates a direct incentive for permanent members to participate in both educational and industry events. With expiring annual credits, companies are motivated to send their employees to educational programs, the NECA Convention, and other events relative to the industry. The goal is for every permanent member to participate in events sponsored by NECA.

ANNUAL CREDIT

In the Chapter's annual budget, the Board of Directors shall allocate an amount into the Education Fund for the upcoming year. This amount will vary depending upon projected union industry man-hours and the overall financial health of the Chapter. Each permanent member will receive credits based on their percentage of dues paid by the Chapter's permanent members during the period of November through October of each year. For example, if the Board sets aside \$75,000 for a particular year and a permanent member contributed 2% of the total dues paid by the Chapter's permanent members during that period, the education fund credits would be \$1,500. Each permanent member will receive a minimum credit of \$500 per year. Unused credits expire at the end of each calendar year.

ELIGIBLE PROGRAMS AND EVENTS

Each permanent member is eligible to use their credits to offset costs associated with attending industry-related

educational programs and NECA events. The Chapter's Member Services Committee is responsible for determining which programs are reimbursable.

NEW MEMBERS

Upon acceptance into Chapter membership, a new permanent member shall receive the \$500 minimum, prorated from the date of acceptance.

REIMBURSEMENTS

Education fund credits may be used for registration fees (including text and materials), transportation, and hotel costs for the duration of the program plus one extra day. Transportation shall include coach airfare, bus, train, mileage reimbursement at IRS published rates, and rental car. Meals shall be reimbursed up to \$50 per day, excluding alcohol. Entertainment, recreation, tips and other incidentals shall not be reimbursed.

ADMINISTRATION

At the beginning of the year, permanent members shall receive a statement of their education fund credits for the coming year. The Chapter shall handle all reimbursements. A standard expense reimbursement form will be provided to each permanent member and reimbursement will be issued to the permanent member company upon completion of the expense form and submission of original receipts.

ADOPTED

Management Services Committee:	May 18, 2000
Board of Directors:	May 23, 2000
Revised:	November 22, 2016

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