

RULES FOR REGION 9A ED FUND REIMBURSEMENTS (rev. 2/25/2025)

ELIGIBILITY

Members in UAW Region 9A may apply for and may be eligible for reimbursement of payments for education, subject to the following annual limits, guidelines and restrictions:

Generally, an eligible member may apply for reimbursement up to \$1,000 per calendar year for educational expenses.

Eligible members enrolled in an degree or certificate program at an accredited college or university may apply for reimbursement of up to \$2,500 per calendar year for tuition and mandatory fees for classes which begin on or after January 1, 2025.

The member must be in a participating local and employed by a participating employer during half or more of the course of study for which reimbursement is sought.

The member must not be on probation and must not have been on probation during half or more of the course of study for which reimbursement is sought.

The expenses for which reimbursement is sought must be payments for actual instruction (whether in person or online, but involving an instructor in real time). Tax and transaction charges on the payment of instruction will be included in the reimbursable amount, but non-tuition student fees will not. Other incidental costs such as books, other course materials, lodging, or transportation, are similarly not reimbursable.

The instruction for which reimbursement is sought must be primarily and most directly for the sake of developing knowledge and/or skills (whether utilitarian or artistic), notwithstanding that the end goal of the member in taking the course may not be the practical application of the knowledge or skills gained.

Classes for the acquisition of utilitarian skills, such as driving or swimming instruction, including skills applicable to the member's job duties (if not primarily for the employer's sake as described below), qualify. A literature, history, or pottery class taken for fun also qualifies.

Activities which, despite a class or course format, are designed primarily to promoting the physical or emotional wellness of the participant will not qualify. For example, a gym membership or the services of a personal athletic trainer would not qualify, nor would individual or group therapy with an instructional format.

For example: Training to be certified as a yoga instructor qualifies, while yoga classes primarily for the sake of staying fit do not qualify, notwithstanding the necessary acquisition of some knowledge of yoga positions.

The reimbursement sought must not be for courses primarily for the benefit of, or required by the employer, e.g. continuing legal education (CLE) or other professional training.

Payment of tuition from the proceeds of a student loan or other indebtedness is reimbursable.

Reimbursement will be charged against a member's annual allocation for the year that the instruction actually takes place rather than the year payment is made. Reimbursement for a course or classes that start in one year and continue into the next will be prorated between a member's allocation for those years.

DOCUMENTATION

An applicant must submit, with their application, documentation demonstrating:

- Proof of actual and successful attendance. Classes for which the member paid but did not attend and/or from which the member did not acquire skills or knowledge to the satisfaction of the instructor do not qualify.
- Proof of payment of the amount actually paid for the instruction. Documentation is not adequate if it shows that an amount was charged but not necessarily paid, or if it shows that an amount was paid but not that the entire amount was attributable to the instruction in question.

Successful attendance may be shown by:

- A certificate of completion with letterhead and signature or comparable indicia of authenticity,
- A transcript from the school/provider indicating a passing grade, or
- A letter or email from the provider, with letterhead and signature or evidence of sending from the provider's email account or comparable indicia of authenticity, attesting to the member's attendance and successful completion of instruction sessions.

Documentation of payment may be one or more of the following:

- A receipt showing actual payment. If the document says it is a receipt rather than an invoice, this is some evidence of actual payment, but it is more dispositive if the amount is shown as "paid", and/or a charge and a zero balance are shown, and/or a method of payment is shown. If these things are all missing, the document should be supplemented with others on this list.
- A canceled check.
- A bank or credit card statement showing payment. Account numbers and unrelated items should be redacted.
- An adequate combination of the above.

Obtaining adequate documentation is the sole responsibility of the applicant. Where, however, some part of the above is unavailable through no fault of the member, the Director may, in their sole discretion, accept such other proof persuasively demonstrating that instruction was completed and/or payment was made.