

HUCTW Education Fund FAQs

1. When are the deadlines for applying to the Ed Fund?

The Ed Fund operates on a traditional semester (Fall, Spring, Summer) schedule. Applications for the Fall must be submitted by January 25th of the following year, for Spring by June 10th, and for Summer by September 10th. Those who are pursuing classes on another timetable should [call the HUCTW office](#).

Course taken and completed during:	Application due:
Fall Semester	January 25 th of following year
Spring Semester (or jan/winter)	June 10 th
Summer Semeseter	September 10 th

2. When do I become eligible for the Education Fund?

All staff in the HUCTW bargaining unit are eligible upon hire. There is no years of service requirement.

3. Where can I get an application?

Applications are available on the HUCTW website at: [Education Fund application form](#)

4. How many classes can I take?

You may apply to the Ed Fund for 1 eligible "course" per application cycle (3 per calendar year).

5. What kinds of classes are covered?

We cover classes that are not covered by TAP or TRP, including:

- Test prep courses
- Conferences, seminars and workshops
- Accreditation and licensing courses
- Courses and certificate classes not eligible for TRP, not taken at accredited schools
- Courses that did not receive a passing grade

6. Are Harvard classes/courses/seminars/workshops eligible?

We can NEVER reimburse for Harvard courses, including CWD classes.

7. Can I apply to the Ed Fund even if I have applied to the Tuition Reimbursement Program?

The Ed Fund will cover TRP-eligible courses ONLY if the following conditions are met:

- A member has “tapped out” (exhausted the entirety of their annual \$5,250 TRP funds)

Or

- A member is still in their Orientation and Review period (first 3 months).

8. What does it mean to be "tapped out"?

Federal tax law limits each person's TRP (Tuition Reimbursement Program) allowance for courses taken **outside** Harvard to \$5,250 per calendar year. If you have exhausted your TRP allowance for the year, the Education Fund will reimburse 50% of tuition for one course per semester.

9. Can I apply both TRP and the Education Fund to the same class?

Yes, but only if you are “tapped out”. TRP covers 90% of tuition for courses outside Harvard up to the annual allowance of \$5,250. The other 10% must be paid by the student; you cannot apply to the Education Fund for this 10%. However, if you have “tapped out”. i.e., used up your annual allowance of \$5,250, before you were reimbursed the full 90% of the course, you can then apply to the Education Fund for reimbursement of the remaining expenses. You will be reimbursed 50% of the remaining expenses.

10. Does the class have to be job related to apply to TRP or Ed Fund?

No. The definition of eligibility is: “does it aid in the pursuit of a career at Harvard,” rather than does it apply to the job you are in currently; as an example, a lab technician taking classes toward a degree in counseling at Lesley University would be eligible. The Fund does also support classes that are job related.

11. Does it have to be towards a degree?

No. You can apply to TAP, TRP or the Ed Fund for classes even if they are not going towards a degree. See hr.harvard.edu for more details about TAP and TRP.

12. When and how are awards made?

Applications are processed in a timely manner after each deadline, and applicants will be notified of their application status as soon as possible. Ed fund award recipients receive a 50% reimbursement which is reflected in their Harvard University Payroll paycheck. It normally arrives in a paycheck 3-4 weeks after the application deadline.

13. How much will I get?

The Education Fund awards 50% of the cost of tuition, with a max of \$2,000 per application deadline. We do not cover any materials, books, or fees.

14. Are there any taxes?

Yes. Because the awards are considered taxable income, withholding taxes are applied at the time the award money is delivered. Awards are taxed at the extra compensation rate (about 41%), however most recipients can recoup most of the tax amount. The amount awarded by the Education Fund is recorded on your W2 as income and as taxes paid. Your tax rate is key. As long as you have only your Harvard check as the sole source of your income your tax rate falls somewhere in the 20-27% rate. If you are scheduled as a 20% payer then you will get back 21%; if you are a 27% payer you will get back 14%. You get back the difference between taxable rate & income. This happens automatically when you file your yearly income taxes. You do not have to file any separate paperwork.