



IATSE ENTERTAINMENT & EXHIBITION INDUSTRIES TRAINING TRUST FUND

POLICIES AND PROCEDURES FOR BENEFICIARIES

I. Introduction and Terminology

This document was developed to outline the specific policies and guidelines of the IATSE Entertainment and Exhibition Industries Training Trust Fund ("IATSE Training Trust Fund") as they apply to beneficiaries and what they need to know about the policies of the IATSE Training Trust Fund.

Its purpose is to answer basic questions about how the IATSE Training Trust Fund operates. Any questions or issues not addressed by this document may be addressed to the IATSE Training Trust Fund at info@iatsetrainingtrust.org.

Trust Beneficiaries Defined: The beneficiaries of the IATSE Training Trust Fund are individuals working in any of the crafts or classifications represented by the IATSE or affiliated unions, under a collective bargaining agreement.

The IATSE Training Trust Fund currently has two types of benefits: (1.) **onsite trust sponsored trainings** or (2.) **direct reimbursement**.

I. TRAINING BENEFITS

The IATSE Training Trust Fund currently has four means of delivering training to Trust beneficiaries. IATSE Training Trust Fund benefits are delivered to beneficiaries via (1.) **Supported Courses** (2) **Calendared courses** (3) **Sponsored courses** or (4) **Direct reimbursement**. The IATSE Training Trust Fund can only pay for course related expenses. The IATSE Training Trust Fund is not able to pay for supportive services ancillary to the course such as beneficiary wages, travel, hotel, child care, food, or refreshments.

- 1. Supported courses** are set reimbursements to Local Unions to help defray the costs of setting up and providing group training for members. Pre-approval is needed for supported courses. The IATSE Training Trust Fund can support course instruction at a set rate. Local Unions must complete and submit the "Supported Training Request Application" form for review. If a "Supported Training Request Application" is approved, the Local Union will be notified of the approved reimbursement amount and the process for receiving reimbursement after the course.
- 2. Calendared courses** are prescheduled courses set up and arranged for by the IATSE Training Trust Fund. Course topics and locations are determined based on demonstrated union and industry needs. Courses will be advertised and interested beneficiaries should submit applications directly to the Training Trust Fund. Applicants will be notified if there is space available in the course and a space has been reserved for them.
- 3. Sponsored courses** may be initiated by the Trust or requested by Local Unions. These are courses that are paid for directly by the Training Trust Fund. When Local Unions are requesting Sponsored courses, they will need to contact the Training Trust Fund for a "Sponsored Training Request Application". Once submitted, applications are reviewed and evaluated by the Training Trust Fund. After an Application is approved, the IATSE Training Trust Fund will contract with an instructor and provide/approve curriculum for the course. The Local Union is expected to be actively involved in the course implementation process. The Trust will also register and maintain

records for course beneficiaries. Beneficiary course registration information will be gathered with the help and assistance of the Local Union requesting the course.

Requests for Sponsored Trust Training Fund courses must be received at least 60 days prior to the proposed date for classes, except in special circumstances. This allows the Trustees time to review and prioritize training requests and allows for sound fiscal management of the IATSE Training Trust Fund. Sponsored courses are considered and approved based on the needs and circumstances surrounding the request.

4. Direct reimbursement for pre-approved certification exams is offered as a means of acknowledging changing demands from employers in the industry and supporting beneficiary advancement in their field. The Trust will only reimburse for exams of pre-approved industry recognized certifications. In order to receive reimbursements, beneficiaries must fill out the IATSE Training Trust Fund reimbursement application (available on the Training Trust and IATSE websites) and return it with proof of payment and proof they achieved the certification/recertification. In order to receive a direct reimbursement for certification, an individual must be an IATSE Training Trust Fund beneficiary. Visit the IATSE Training Trust Fund website for more information on currently available pre-approved reimbursement programs.

The IATSE Training Trust Fund does NOT pay for ancillary costs of training, such as lost wages, travel & hotel expenses, child care, etc.

The Trustees welcome suggestions and proposals for other types of education, such as online courses, which can be evaluated to determine their overall benefit for the beneficiaries of the IATSE Training Trust Fund.

The Trustees will consider requests from Local Unions for training even if the Local Union is not signatory to any contracts that require employers to contribute to the IATSE Training Trust Fund. In such cases, the Trustees may request that the Local Union make appropriate efforts and arrangements to secure contractual commitments from employers to make contributions.

Beneficiaries may not receive more than \$550 per calendar year in direct reimbursement. Funds available for direct reimbursement are limited. If a beneficiary submits a request for reimbursement for more than one certification/recertification, the Trustees may withhold payment for such additional certifications until all requests are paid for first certifications and/or re-certifications. Beneficiaries considering additional certifications may want to make inquiries to the Trust office concerning availability of reimbursements before taking such additional certification courses.

The Trustees reserve the right to amend, modify, delete from, or change these policies at any time to the full extent provided by law.

II. Eligibility Criteria

In order to be eligible for an IATSE Training Trust Fund program, an individual beneficiary must be working in a craft or classification represented by the IATSE, or affiliated unions, under its various collective bargaining agreements. Sponsored courses may carry specific class pre-requisites which must be met for admission to the course. Eligibility for specific training and reimbursement programs is subject to the discretion of the Trustees.

III. Accessing Benefits

There are several ways in which you can access the benefits available to you through the IATSE Training Trust Fund.

A. Reimbursement Benefits

To access your reimbursement benefits, you must fill out a Student Reimbursement Request form for a previously approved program. All of the programs approved for reimbursement are listed on our website. Forms are also available on our website along with the IATSE International website.

B. Onsite or Online Courses

The IATSE Training Trust Fund may from time to time sponsor courses or work with locals to support training courses. These courses are initiated by the IATSE Training Trust Fund or by local unions requesting training support. These courses will be listed on our website along with information on how to access/apply for the course.

C. Fee Based Courses

From time to time, the IATSE Training Trust Fund may offer courses, sponsored or local union supported, that charge a fee to beneficiaries for their participation. These fees ensure that the IATSE Training Trust Fund is able to defray costs and offer benefits to as many beneficiaries as possible.

IV. Suggesting New Programs and/or Courses

IATSE Training Trust Fund programs and courses are approved by our Trustees and subject to change at the discretion of the Trustees. This also means that programs and courses may be added to our menu from time to time at the discretion of the Trustees and on the recommendation of the IATSE Training Trust Fund.

If there are specific courses or programs you would like to see added or offered for advancement or continued work in your field, please fill out one of our member surveys available on our website and email it to us. You can also talk to your local union to see if they will pursue submitting a Training Request for the course.

V. Contact Information for the IATSE Training Trust Fund

Website: <http://iatsetrainingtrust.org>

Email: info@iatsetrainingtrust.org

THESE POLICIES, PROCEDURES, CRITERIA AND GUIDELINES ARE SUBJECT TO CHANGE AT ANY TIME BY THE TRUSTEES. THE APPLICATION AND/OR INTERPRETATION OF THESE GUIDELINES SHALL AT ALL TIMES BE SUBJECT TO THE DISCRETION OF THE TRUSTEES, TO THE FULLEST EXTENT PERMITTED BY LAW.