Oregon-Columbia Chapter, NECA
EDUCATION FUND POLICY

Establishment of Funds

Education Account monies are established each year during preparation of the budget and approved by the Board of Directors. The funds are allocated to each permanent member's account based on the past three-year average of the NECA dues paid into the Chapter.

The individual member's percentage dues paid into the Chapter is then used to calculate the percentage of the total Education Account allocated. For example, if a member pays 3% of the total NECA dues, they receive 3% of the Education Account available.

Eligible Expenses

Expenses are paid for permanent members and their company representatives for industry related educational seminars and conventions. Expenses paid include:

☑	**Registration Fees**	Seminars, Conventions, Workshops & Industry-related College Tuition
☑	**Lodging**	One night for each day of the convention, seminar or workshop (**or company retreat when a 3rd party instructor or speaker is contracted with**) plus one night prior and one night after.
☑	**Transportation**	Air Bus Train Rental Car Cabs Rideshare (Lyft, Uber, etc.) Parking
☑	**Educational Materials**	Books, Forms, Training Software, Other NECA or Industry Materials **(electronic or otherwise). Not including hardware.**
☑	**Safety PPE/COVID-19**	Safety & PPE ed funds may be used for all safety products and service-related purchases, including but not limited to: NFPA 70-E Training, hand sanitizer, wash stations, disinfectant cleaning supplies, gloves, thermometers, thermal imaging and temperature sensing devices, face coverings, face shields, goggles, and social distancing devices and barriers. Oregon-Columbia Board of Directors is responsible for determining reimbursable COVID-19 related expenses.

Expenses are paid for permanent members and their company representative, including immediate family members, for industry related educational seminars and conventions: One night for each day of the convention or workshop; plus one night traveling to and one night traveling from the event. Payments are made to travel agents, hotels, educational institutions, transportation companies, i.e. airlines, etc., sponsoring organizations of seminars and/or conventions.

Payments will not be made to individual members or their firms.

Education Fund checks are issued only from proper invoices, accompanied with a completed Education Requisition Form signed by the Accredited or Alternate Representative of the member firm. **Please note that as of 2018, we now require the name and last 4 digits of the credit card used to issue a check.**

Education Fund monies are established on a calendar year basis, however, up to $20,000 may be carried over into the next year's account for the same member firm. The The Board of Directors will be the determining, final decision for any education expense approval. **The deadline for Educational Fund requests is December 15 of the current year at 5:00 p.m**. **Education Fund dollars are available to all members current and in good standing with Chapter dues and industry fringe benefits.**

Return of Education/Convention Funds

In the event the class/workshop/convention that Education Funds were used for is canceled, or the person using the funds cancels their attendance, all Education Funds should be returned to Oregon-Columbia, NECA minus any cancellation fees incurred. This money will be returned to the respective members' education fund account and/or convention account.