



TUITION BENEFIT FUND

TERMS OF REFERENCE

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1.0 Purpose

- 1.1 The purpose of these Terms of Reference is to provide guidance to the TB administrator and Executive Committee to manage the Faculty Association's ("the Association") annual \$250,000 Tuition Benefit Fund.
- 1.2 Any defined terms below have the same meaning as in the Bylaws of the Association.

2.0 Preamble

- 2.1 An application requires information about the Member and the recipient if the recipient is not the Member.
- 2.2 "Eligible Recipients" include Members, the spouse of a Member, and biological, adopted, and stepchildren of Members.
- 2.3 "Member" refers to a Member of the Bargaining Unit, not a member of the Association.
- 2.4 "Recipient" refers to the individual taking courses at the University of Victoria.
- 2.5 Members with full and part-time appointments will have equal access to tuition benefits.
- 2.6 The Tuition Benefit Fund will be awarded by the Association and will be administered and distributed by the University of Victoria.

3.0 Terms of Reference

- 3.1 The call for applications will be July 1st.
- 3.2 The Deadline for Application will be August 25th.
- 3.3 Applicants will be informed as to the amount they will receive in tuition benefits before September 20th.
- 3.4 The full amount (\$250,000) will be made available for award each year (for the period of September in one year to August of the following year). Should the full amount not be used, the unused funds will be added to the available funds in the following year.



- 3.5 A recipient's award is equal to their qualifying claim, specified in 3.7, multiplied with the rate of subsidization outlined in 3.6.
- 3.6 The amount of each award depends on the total number of applications. The rate at which a qualifying claim is subsidized is equal to the following:
- (i) if the full amount of tuition benefit funds in the award cycle is smaller than the sum of qualifying claims: (full amount of tuition benefit funds in given year) divided by the (sum of qualifying claims in given year).
 - (ii) if the full amount of tuition benefit funds in the award cycle is greater than or equal to the sum of qualifying claims, then a qualifying claim will be subsidized at 100%.

This rate is fixed for the full award cycle in which benefits are paid out but may vary from year to year based on the sum of qualifying claims.

- 3.7 The unit of measurement for claims in each award cycle is credit units. The qualifying maximum yearly amount that can be allocated to each recipient is the cost of a full undergraduate course load (10 courses, each at 1.5 credit units) in Humanities, Social Sciences and Science for domestic students as published in the May academic calendar in each year (in May 2023, this cost is \$6,165.60, so \$411.04 per credit unit). Thus, applicants are eligible for 15 credit units per year.
- 3.8 The fund will not pay for ancillary fees.
- 3.9 Each recipient will be eligible for a lifetime maximum of 60 credit units of tuition benefit, which can be applied exclusively to courses offered at the University of Victoria in undergraduate and/or graduate degree programs. Courses offered by Continuing Studies or courses that are not part of a Bachelor, Master, or doctoral program do not qualify.
- 3.10 The qualifying claim for recipients who are registered in graduate programs is calculated by computing "credit unit equivalents". Applicants will list the actual tuition fees per term as well as indicating how many credit units they take. Their qualifying amount is the lesser of the amount obtained by multiplying the reported credit units with the tuition fee specified in 3.6 and the sum of actual tuition payments. If the latter applies, the applicant's credit units will be recorded as "credit unit equivalents" by dividing the qualifying amount by the cost of one credit unit as determined by 3.6.
- 3.11 The tuition benefit never reimburses recipients at a higher rate than a recipient's actual cost of tuition. Recipients must disclose if they receive funds from other programs earmarked to cover the costs of tuition (i.e. scholarships or grants that go towards tuition).
- 3.12 The tuition benefit only pays for completed courses. To this end, a recipient gives permission to the Association to determine how many courses a recipient has actually completed compared to the number of courses specified at the time of application. If



there is a discrepancy between the numbers, the recipient must reimburse the Association for courses not completed.

- 3.13 Tuition benefits are not transferable from year to year or from one recipient to another. If a recipient decides to withdraw from one or more courses, the tuition benefit cannot be transferred to another year or another recipient.
- 3.14 All awards are reported to CRA on behalf of the recipient.