

## Training Voucher Program: Overview

The purpose of the voucher program (“Program”) is to promote enhanced journeymen training. The Program accomplishes this by supporting supplemental training of Local Union 725 members beyond the training that can be offered locally by the JATC. To accomplish this, the Program offsets some of the financial burden of Employers who pay to send their employees to supplemental training.

To obtain Program benefits, participating Employers must be in good standing with payment of their fringe benefit contributions. Employer must employ one or more 725 Journeymen in addition to Owner-Operators.

The Program applies to the following training:

- Technical training related to the HVAC industry
- Leadership development training
- Computer software training
- Other supplemental education that enables the Employee to perform more effectively

The Program would not apply to the following training, unless the parties agree in writing to an exception:

- Training held at or otherwise provided by the JATC training center
- Online training
- In-house training presented by the Employer. However, outside expert training, such as manufacturer training, brought in by the Employer, or a group of Employers, would apply.

Each Employer will be allocated a portion of the year’s total available Program funds. A minimum (base) amount will be allocated to each Employer, and an additional amount will be calculated based upon total JATC contributions in the prior year. For subsequent years, Employers will be notified of their available annual allocation each December for the following calendar year. The Program operates on a calendar year basis. Funds are approved based on an Employer allotment for the first six months of the calendar year. Thereafter, funds are available on a first-come, first-served basis. Funds expire at the end of the year, and are not rolled over; use it or lose it.

The maximum reimbursable amount an Employer can apply for per Employee per week is based upon the Employee’s hourly straight time taxable wage rate as specified in the wage & benefit schedule then in effect x 40 hours. Reimbursement does not include the payment of fringe benefits. Employers are not required to pay fringes for non-bargaining work hours, such as participating in training. Only classroom hours are eligible for reimbursement. Program does not apply to pre-apprentices or MAT. Please see FAQ sheet for helpful examples.

### Program application & reimbursement process

**Step 1: Application.** The Employer must provide a completed voucher application at least 10 days before the start of the class, including a course description & course program provided by the training entity.

**Step 2: Review.** The Training Coordinator will review applications to determine if they are complete, comply with program rules, and are within the Employer’s allocation. He will notify the Employer and Administrator of the determination in writing.

**Step 3: Reimbursement.** The Employer will be responsible for paying the Employee and the JATC will send the approved reimbursement to the Employer. Payments will not be issued directly to an Employee. The Employer must submit a request for reimbursement and provide all required documentation within 90 days after completion of the training program, including:

- 1) signed official company time sheet
- 2) copy of the employee’s referral form showing the Employee’s wage
- 3) proof of completion from the course provider and
- 4) official training program and class schedule.

## Training Voucher Program: Frequently Asked Questions

These FAQs were prepared to help the members of Local Union 725 and MCASF become familiar with the Training Voucher Program. The following questions and answers were approved by MCASF and Local 725 on May 13, 2020, updated Sept. 2, 2021.

1. **What is the goal of the Voucher Program?**  
The Program promotes and supports supplemental training of Local Union 725 Journeymen beyond the training that can be offered locally by the JATC.
2. **How does the Program promote training?**  
The Program reimburses Employers for certain wages paid to Journeymen attending qualifying training.
3. **Can I use the Program for training at ARPEC?**  
No. Only training that is not, or could not reasonably be, offered by the training center qualifies.
4. **What are some examples of training that would qualify?**
  - Technical training – for example, sending an Employee to training led by a manufacturer
  - Leadership development training – for example, the MCAA Field Leaders program
  - Software training – for example, attending a class on how to use diagnostic software
  - Other supplemental education that enables the Employee to perform more effectively
5. **What are some examples of training that would not qualify?**
  - Training held at or otherwise provided by ARPEC or online training, unless the parties agree in writing to an exception.
  - In-house training presented by the Employer; however, outside expert training, such as manufacturer training, brought in by an Employer would apply.
6. **Can we apply to use the Program for our company safety meetings?** No, the Program doesn't apply to in-house training presented by the Employer.
7. **Will the Program pay my Employee's wages when they attend qualified training?** No, the Employer must pay the Employee their wages while attending qualified training and the JATC will send the approved reimbursement to the Employer. The JATC will not issue payment to an Employee.
8. **Can I apply for reimbursement of the Employee's fringe benefits, too?** The Program does not include reimbursement of fringe benefits. Employers are not required to pay fringes for non-bargaining work hours, i.e. training hours, unless training occurs during the scheduled work day, between job sites.
9. **Why do I have to provide the official program and classroom schedule?** Only classroom hours are eligible for reimbursement. The official program provides important verification of both hours and content of the training program.
10. **My Employee is attending training out of state and I am paying my Employees for travel time. Can I ask for reimbursement for that, too?** For the time being, the JATC has limited the Program to reimbursement of wages for classroom hours only, since those are easily defined and documented. The Program is intended to help offset the costs entailed in sending an Employee to training, rather than covering 100% of the costs associated with the training.
11. **How do I apply?** Employers will be required to submit a Training Voucher Application using the form provided.
12. **Is there a defined period of time in which an Employer can apply for the Program?** Yes, the Employer must provide a completed application at least 10 days before the start of the class, including a course description & program provided by the training entity. The application must be filed by the Employer and not the Employee.
13. **How will I know if my application was approved?** You will receive a response via email from Training Coordinator Jason Hebbert within one week after receipt of your complete application.

#### 14. My application was approved. What's next?

The Employer must submit a reimbursement request in writing and provide all required documentation within 90 days after completion of the training program, including:

- a. a signed official company time sheet
- b. a copy of the employee's referral form showing the Employee's wage
- c. proof of completion from the course provider.
- d. official training program and class schedule

The reimbursement request and supporting documentation must be provided by the Employer and not the Employee. After the 90-day period is up, incomplete applications will be voided.

#### 15. How soon will I receive my reimbursement?

Pending approval of your application and timely submission of all required documentation, reimbursement will be issued within one month.

#### 16. My application was rejected. Can I appeal the decision of the Training Coordinator?

Yes, you may issue a written appeal directed to the JATC Board of Trustees and your application will be reviewed at the next regularly-scheduled meeting.

#### 17. Does the Program include all classifications in the local CBA and NSMA?

Employers may use the Program to request reimbursements for wages for all classifications except Employees working as pre-apprentices, helpers and maintenance tradesmen (MAT).

#### 18. How much can I apply for?

Each Employer will be allocated a portion of the year's total available Program funds. A minimum (base) amount will be allocated to each Employer, and an additional amount will be calculated based upon total JATC contributions in the prior year. In subsequent years, Employers will be notified of their available annual allocation each December for the following calendar year.

The Program operates on a calendar year basis. Funds are approved based on an Employer allotment for the first six months of the calendar year. Beginning July 1 of each year, unused funds are made available on a first-come, first-served basis.

#### 19. If I don't use my allotment, will it roll over to the next year?

Funds expire at the end of the year, and are not rolled over; use it or lose it!

#### 20. What is the maximum amount per employee per week I can apply for?

The maximum reimbursable amount an Employer can apply for per Employee per week is based upon the Employee's hourly straight-time taxable wage rate as specified in the wage & benefit schedule then in effect x 40 hours.

For R1, R5, Foreman, General Foreman and apprentices, reimbursement will be for the Employee's straight-time wages as specified in the wage and benefit schedule, and does not include overscale wages. Apprentice premium pay earned by obtaining certificates and / or county Journeyman licensure and documented on the employee's referral is considered to be part of the apprentice's standard pay, and is therefore not considered "overscale" pay.

*Example 1: For training expenses incurred between July 15 - Dec. 31, 2021 the maximum amount per R1 Employee per week is \$1,567 (\$39.18 x 40 hours). In August 2021, an R1 Journeyman whose referral form shows that he is referred out at \$41.18 per hour (\$2 per hour over scale) attends training and was paid by his Employer. The Employer may apply for the Program reimbursement at the \$39.18 per hour rate, which is the R-1 scale specified in the Collective Bargaining Agreement and does not include overscale wages.*

For Employees whose pay is based upon a sliding scale, specifically, R2, R3, R4, MES2, MES3, reimbursement will be at the straight time rate for taxable wages as stated on the applicant's referral.

*Example 2: A MES3 whose referral form shows that he is referred out at \$25 per hour attends training and was paid by his employer. Following his last referral, his employer raised his wages to \$30 per hour. The employer may apply for the Program reimbursement at the \$25 per hour rate.*

*Example 3: A MES3 whose referral form shows that he is referred out at \$30 per hour attends training and was paid by his employer. The employer may apply for the Program reimbursement at the \$30 per hour rate.*

QUESTIONS? PLEASE CONTACT TRAINING  
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