

# **Rules of allocation for the Vocational Training Fund of the Association of Academics**

These rules were approved on 04 March 2019.

## **1.0 About the Fund, Member Societies, Fund Members' Rights, etc.**

### **1.1 About the Fund.**

The activities of the Fund are based on a charter for the Vocational Training Fund of the Association of Academics (BHM) from 11 February 2013.

### **1.2 Member Societies.**

Members from the following member societies of BHM can receive grants from the Fund: The Association of Icelandic Architects, the Icelandic Veterinary Association, the Society of Broadcast Journalists, the Icelandic Society of Radiographers, the Association of University Teachers, the Association of University Teachers in Akureyri, the Academic Union of Ministerial Staff, the Icelandic Social Science Association, the Icelandic Actors Association, the Icelandic Association of Professional Dancers, the Union of Natural Scientists in Iceland, the Icelandic Association of Directors, the Icelandic Association of Biomedical Scientists, the State University Professors' Union, the Reykjavík University Academics, the Icelandic Association of Social Workers, the Union of University Graduates, the Icelandic Occupational Therapy Association, the Union of Economists, the Association of Actors at the National Theatre of Iceland, the Icelandic Midwives' Association, the Association of Icelandic Priests, the Icelandic Union of Library- and Information Scientists, the Union of Lawyers, the Icelandic Psychological Association, the Icelandic Physiotherapy Association, the Association of Social Educators.

### **1.3 Seniority.**

Fund Members must have been members of the Fund for at least six continuous months in order to become eligible for allocation, based on the date of the start of the project.

### **1.4 Maternity/Paternity Leave.**

Fund Members enjoy full rights during maternity/paternity leave under Act No. 95/2000 on Maternity/Paternity Leave and Parental Leave, provided that union dues are covered by payments from the Maternity/Paternity Leave Fund to the relevant member society, cf. item 1.2.

### **1.5 Priority.**

If the Fund dries up or the Fund is at a disadvantage in terms of income and expected obligations in the opinion of the Fund's Board, those Members who have never previously received an allocation from the Fund shall have priority above others. If there is still a need for prioritization, the Fund's Board may give more academic projects priority over others.

## **2.0 Processing of applications.**

The Fund's staff process applications in compliance with these Rules of Procedure and in accordance with the Fund's Board's decisions.

The Fund's Board shall resolve issues, for example regarding membership or funding eligibility for applications and shall deal with other matters which may arise. The Board shall on average meet once every month.

### **3.0 Obligations of the Employer.**

Only individuals may apply for grants, provided that they are Fund Members. The Fund's Board may decrease grant amounts if others take part in the cost of the project. If the Board believes that an application to the Fund should be funded by another entity, it reserves the right to take no action and will notify the applicant of this.

### **4.0 Applicants.**

If a monthly payment of ISK 660 or more is paid for a Fund member to the BHM Vocational Training Fund and Fund members meet the conditions of items 1.2 through 1.4 and 10.1 through 10.3., the Fund member may apply for a maximum grant from the Fund for projects referred to in item 5.0, provided that at least two years have passed since the applicant last received the maximum grant allocation from the Fund, cf. item 8.1. The vesting period for rights shall be based on Fund membership for six continuous months.

### **5.0 Eligible Projects.**

#### **5.1 Project Subject Matter.**

Projects must generally relate to either the Fund Member's work or occupational field in order to qualify for funding. However, courses intended to increase overall competence in the fields of computer technology and language are still often eligible even if the courses may not be directly related to the applicant's occupation or university education. The same applies to projects that do not fall within the applicant's occupational field if the applicant can demonstrate that it will nevertheless be useful in his or her work. Purely leisure courses are not eligible for grants. The Fund's Board shall assess ambiguous cases.

#### **5.2 Project Location and Duration.**

It is possible to apply for a grant for domestic and foreign projects, such as courses, conferences, forums and organized professional visits or excursions. The program of an organized professional visit or excursion abroad must be spread over at least two days and the educational program must consist of a total of 8 hours minimum of education. The educational program of an organized professional visit or excursion in Iceland must consist of a total of 6 hours minimum.

#### **5.3 What Is Funded.**

Fund Members are eligible for a grant for education costs, course costs, conference fees, hotel and accommodation expenses and travel expenses. Funding is granted for air fare with regard to travelling abroad and fixed grants are allocated for expenses from travelling in Iceland. If the distance from the legal domicile to the place of learning or international airport is more than 100 kilometers, a payment of ISK 15,000 is made. If this distance is more than 250 kilometers a payment of ISK 30,000 is made.

#### **5.4 What Is Not Funded.**

Fund Members do not receive funding for: subsistence (food expenses), travel within cities and municipalities, wage loss or the cost of procurement of educational

materials. Funding is not provided for projects which the Fund member's spouse, child/children or other individuals closely connected to the Fund member wish to pursue. As regards sightseeing excursions, funding is usually only granted to a Fund member who works for the company/institution that organizes the relevant excursion and makes payments for the relevant party to the BHM Vocational Training Fund. No grant is made for such excursions as regards the Fund member's spouse, child/children or other individuals closely connected to the Fund member even though that party is a BHM member and Fund member of the BHM Vocational Training Fund.

#### **5.5 Grant Amount.**

The maximum grant is ISK 100,000 for a 24-month floating period, counting from the first disbursement (and subsequently from the first disbursement after renewal of the grant). Grants are never allocated in excess of the amounts on presented invoices.

### **6.0 Applications, Their Completion and Dispatch.**

#### **6.1 Applications.**

Applications shall be submitted electronically to the Fund through the portal My pages with BHM.

#### **6.2 Completion of Applications.**

Fund Members shall carefully complete their applications and specify precisely how they intend to use the grant and how the grant will help to improve their general professional competence, as well as fill out information on other factors that are inquired about in the electronic application process. Otherwise, applicants risk experiencing a delay in the processing of their applications until the required information has been supplied.

#### **6.3 Dispatch.**

After an application has been considered, the decision is announced by e-mail. In the same missive, the documents which need to be presented in order to have the grant disbursed are listed.

#### **6.4 Responsibility of Fund Members**

In cases where a grant application meets the requirements of both the BHM Vocational Education Fund and the Career Development Center, it is the responsibility of the Fund Member to decide which fund to apply to for a grant. The application cannot be reversed and moved between funds once the grant has been disbursed.

### **7.0 Disbursements from the Fund.**

#### **7.1 Payment Confirmation.**

Payments from the Fund are ordinarily made upon presentation of an invoice which has been verifiably paid. If the invoice is lost, the Fund's Board assesses whether

and under what conditions the grant will be paid out. The Fund's Board reserves the right to request original copies of invoices should it deem it necessary to do so.

### **7.2 Confirmation of the Project.**

If a grant is sought for an organized professional visit or excursion, the applicant must provide confirmation of attendance in addition to the presentation of an invoice. The confirmation shall be in the form of a signed letter from a superior or the supervisor of the excursion. The letter shall contain a description of the excursion and an explanation of its purpose. Also enclosed shall be a list of participants along with a detailed program describing the professional part of the excursion and specifying the places visited, what material is presented at each location and the relevant times. Grants for such excursions are usually restricted to the employees of the company or institution that organizes the relevant excursion, cf. item 5.4. The Board of the BHM Vocational Training Fund shall arbitrate in ambiguous cases.

Applicants must report absences to the Fund.

### **7.3 Deadline for Receipt of Payment Documents.**

In order for a grant to be disbursed from the Fund, all documentation must be submitted. The Fund Member is responsible for submitting the required documentation to the Fund within 12 months of the completion of the project.

### **7.4 Grant Disbursement.**

Grants are disbursed from the Fund at least once a month. Usually disbursement takes place every week, on every Friday. However, there can be a longer interval in exceptional circumstances. Prerequisites for payment are that the Fund's Board has approved the application and that confirmation of payment has been received. In the event of a grant for an organized professional visit or an excursion, confirmation in accordance with Article 7.2 must be presented to the Fund prior to grant disbursement.

### **7.5 Notification of Grant Disbursement.**

Once a grant has been paid out to a Fund Member, a notification is sent to him via e-mail.

### **7.6 Information to Tax Authorities.**

At the beginning of each year, information is sent to the tax authorities wherein beneficiaries and grant amounts from the previous year are listed. The Fund Member is responsible for preserving the original invoice for the expense for which a grant has been obtained to present to the tax authorities if requested.

### **7.7 Reserved Flexibility.**

The Fund reserves the right to flexibility in the disbursement of the grant. Efforts will be made to disburse grants from the Fund as soon as circumstances permit in each case.

## **8.0 Time Between Grant Disbursements, Part-time Jobs, Lapse, etc.**

### **8.1 Time Between Grant Disbursements.**

The maximum grant is ISK 100,000 for each 24-month floating period, cf. item 5.5.

### **8.2 Half-grants.**

If payments of less than ISK 660 are made each month to the Fund for a Fund member, that member is entitled to a half-grant, i.e. a maximum of ISK 50,000, for the 24-month period. If there is doubt regarding whether a Fund member is entitled to a full grant or a half-grant, the average of premium payments over the preceding six months shall be calculated, counting from the day when the Fund received the application. If the calculated average is ISK 660 or higher, the member is entitled to a full grant. If on the other hand the calculated average of premium payments over the preceding 6 months is ISK 659 or lower, the member is entitled to a half-grant.

### **8.3 Retroactive Applications.**

It is possible to apply for a grant for a project as old as one year based on the date of the end of the project. An application must therefore be received at the Fund's office no later than one year after the date of the end of the project.

### **8.4 Lapse of Right to Grant Disbursement.**

The right to payment in accordance with the Fund's decision lapses if the applicant has not submitted the necessary documentation (invoices and confirmation) within 9 months from the date of notification of the grant.

### **8.5 Double Payment or Overpayment of Grant.**

If a mistake occurs in the handling of a grant application or payment of a grant, the Fund's staff will endeavor to correct the error as soon as possible. If a Fund Member has received double payment or excess payment of a grant, he or she is obligated to notify the Fund of the mistake and reimburse the Fund immediately for the overpaid amount.

## **9.0. Right to Cancel Application.**

A Fund Member who has been approved for a grant is not obligated to complete the project for which the grant was offered. If the applicant does not accept the grant offer or cancels his application before disbursement, the application has no effect on his or her rights in the Fund.

## **10. Interruption or Discontinuity of Fund Membership.**

### **10.1 Unpaid leave.**

A Fund Member on unpaid leave is entitled to funding in accordance with the rules of the Fund during the first 6 months, provided other conditions are met.

### **10.2 Unemployment.**

Former Fund Members who are unemployed can apply for and receive a grant from the Fund in accordance with the following rules:

#### **a. Conditions.**

The applicant must have been a Member of the Fund for at least six months when he becomes unemployed, cf. item 1.3, no more than 12 months may have passed since he or she lost his or her job and he or she must have paid union dues for unemployment benefits. Unions may lengthen this period up to a total of 3 years, if they pay a 0.22% unemployment premium for unemployment benefits to the Fund from the start date of the period of unemployment.

**b. Eligibility.**

If funding is sought for retraining or continuing education in accordance with what is considered to be eligible for funding for other Fund Members or is sought for a course which is directly related to the unemployment of Fund Members.

**c. Application Procedure.**

With regard to the form and processing of applications from unemployed people, the same rules of procedure that apply to other Fund Members and grant disbursements to them usually apply.

**10.3 Illness.**

Fund Members retain their rights in the Fund for the period during which they receive sickness allowance from the BHM Sickness Fund or the BHM Relief Fund. The affairs of Fund Members who receive rehabilitation allowance from the Social Insurance Administration are processed in the same way as those of the unemployed, cf. item 10.2.

**10.4 Severance Agreements and Compensation upon Employment Termination.**

Fund Membership is considered to end when the employment relationship ends. An agreement between parties of an employment contract relating to compensation upon termination, including how it should be determined and paid, does not have an effect on the Fund's Board assessment of when an employment relationship is considered to be over.

**10.5 Other Discontinuity of Membership.**

The Fund's Board will decide on a case-by-case basis whether and how to assess previous Fund membership in order to bridge the discontinuity of membership. Discontinuity of membership may, however, never exceed 6 months.

**11.0 Right to Appeal.**

If a Fund Member is dissatisfied with the Fund's decision regarding a grant application and supporting documents, he shall always have the right to refer the case to the Fund's Board again for review. The case will then be addressed at the next Board meeting.

**12.0 Entry into Force.**

These rules were agreed by the Fund's Board on 04 March 2019 and shall enter into force upon publication on the BHM homepage. Upon entry into force, previous rules of procedure and other decisions which are not in accordance with these rules shall cease to

apply. If the Fund's Board makes any alterations to these rules, they will be presented in an appropriate forum and updated on the Fund's website.

Reykjavík, 04 March 2019

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