Directions:

☐ Print the handbook and read through
☐ Sign Student Guidelines on pages 9-12
☐ Email or Fax signed Student Guidelines to your Ed Fund Counselor

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Welcome to the STEP (Success Through Educational Preparation) program provided by the SEIU United Healthcare Workers-West and Joint Employer Education Fund!

What is the SEIU UHW-West and Joint Employer Education Fund?
Your union, your employer and other healthcare employers agreed through the collective bargaining process to form the SEIU United Healthcare Workers–West and Joint Employer Education Fund. The Education Fund was created to give healthcare workers opportunities for career advancement and employment security, and to maintain an excellent standard of quality care. The Education Fund provides a range of educational and training benefits for eligible members. Educational benefits offered through the Fund are in addition to any which may be offered by your employer.

STEP PROGRAM OVERVIEW

The STEP program is designed to support healthcare workers to complete the core sciences and most program prerequisites with the highest possible grade point average in order to improve their chances of acceptance into nursing and allied health programs. STEP also supports ESL, pre-college and academic readiness courses, and some college computer classes.

What is included in the STEP program?
STEP will support you through a series of classes at selected community colleges, paying for tuition, required fees and required books (up to $350 per class). You will also be assisted by an Education Fund Career Counselor before and during each semester. Online tutoring is provided for many classes.

What classes does the STEP program support?

- Computer Basics
- Word
- Excel
- Intro to Computer Science
- ESL
- GED
- College Readiness
- Math – all levels
- Statistics
- Physics
- English – all levels through advanced composition
- Critical Thinking
- Foreign Language (Northern California only)
- Biology
- Chemistry
- Anatomy
- Physiology
- Microbiology
- Pharmacology
- Genetics
- Physics
- Medical Terminology
- Nutrition
- Psychology (General & Life Span)
- Speech
- Sociology (Northern California only)
STEP POLICIES AND PROCEDURES

Students are expected to:

1. By the end of the first week of the semester, confirm with your Counselor that you have attended the first day of class and do not plan to drop it. If we don’t receive this confirmation we will withdraw our payment voucher from the college and you will be responsible for all tuition and fees.

2. Check in once a month with your Counselor, either by phone or email & once a semester have an in depth discussion about future education goals.

3. If the Ed Fund offers Tutor.com for your STEP class, we expect that you access it at least once.

4. Notify us which class you plan to take the following semester by applying online before the deadline.

5. Submit proof of final grade- within 2 weeks of grades being posted. If we do not receive your grade in a timely manner, it will be assumed that you did not complete your class successfully, and you will be sanctioned from participating in future classes for one year.

6. Notify your Counselor if any of the following occur:
   o Changes to contact information, such as email, phone and mailing address.
   o If you drop the class, submit proof of your drop to your Counselor.
   o If your grades fall below a B-, discuss your grades and how you can improve your performance with your Career Counselor.

ACADEMIC SANCTIONS POLICY

If one or more of the following circumstances occur, you will be subject to academic sanctions for a period of one year (365 days from the initiation of sanctions):

1. You do not submit a final grade to STEP Counselor in a timely manner at the end of the semester.
2. You earn a D, F, No Credit, Incomplete or No Pass in your STEP class.
3. You drop two STEP classes within two years. This includes class drops that take place during both your school’s add/drop period and during the withdrawals (W) period.

The purpose of the Academic Sanctions Policy is to strongly encourage students to take seriously the benefits provided by the Education Fund. Those who enroll in programs without a strong commitment to successfully completing are wasting resources that have been provided by all of those covered by the Fund. The sanctioned student will not be allowed to access Education Fund-sponsored programs that begin during the ensuing year. The one year term of the sanctions will begin on the date that the student fails the class, or on the date that Education Fund benefits are discontinued.

At the discretion of The Education Fund, students who are sanctioned may access Career Counseling and assessment services during the academic sanction period, and take part in Skill Builders classes. The Executive Director of the Education Fund can waive sanctions in the event that someone either fails or withdraws from a class or program for good cause. If you petition to have your sanction waived, you should work with the counselor to send a letter explaining the circumstances behind not completing your STEP class successfully. You should include a plan about which steps he/she will take to improve his/her academic performance in the future.
REGISTRATION, TUITION, FEES AND BOOKS

Registration, Tuition and Fees
- The colleges have not guaranteed the Education Fund seats in these classes. Register for the course through the college’s regular registration process.
- Email or Fax your proof of registration or waitlist to the Education Fund within 24 hours.
- A voucher will be sent to the college to pay tuition and required fees where we have agreements.

Textbooks
- In an email from your Counselor you will receive directions on how to obtain your books (do not go to the bookstore until you hear from your Counselor).
- Only students who are registered will get their books paid for by the STEP program.
- The STEP program only pays for required textbooks and online materials for your STEP class (up to $350 per class). It does not cover recommended or optional textbooks or any supplies.
- If you purchase anything other than required textbooks with the allotted amount provided ($350) for your STEP class, you will be charged by the bookstore and a hold may be put on your account.
- The Education Fund requires students who are unable to complete classes for any reason to return any text books paid for by the Education Fund.

Reimbursement
There are instances when the student will pay for their tuition and books. This usually occurs:
- If we don’t have billing agreements with the College billing office or bookstore.
- If the student has to pay for class ASAP because the college will drop them from their class for non-payment (sooner than we can make a payment voucher).
- If the student wants to buy their books sooner than we can set up their account at the bookstore.

If you paid for your tuition or books make sure to save your receipts.
- If you paid online, email or fax the electronic receipt to your Counselor.
- If you paid in person, mail the original paper receipt to your Counselor. Photocopies or scanned bookstore receipts are not accepted. Keep copies of any receipts submitted.
- You will be reimbursed via check after the semester starts and the refund date has passed.

Waitlisted or Changing classes
- Notify your Counselor once you come off the waitlist and become registered so we can set up your account at the bookstore. Please note this can take several days to process.
- If you want to change classes, notify your Counselor to see if there is time to change the tuition or textbook voucher. Please note any changes to your class can take several days for us to process.

CSU San Marcos Online sciences only
- The Education Fund has purchased seats solely for our students, but you still must enroll in the college and obtain a student ID number. The Education Fund will register approved students for their class and pay for the tuition and fees.
- Textbooks and other materials will be sent through the mail by the school or will be made available in an online format by your CSU San Marcos instructor.
**STEP PROCESS**

**THOSE CONTINUING WITH STEP**
- Apply online to let us know what class you plan to take the following semester
- Receive Next STEPs email from your counselor
- Register for your supported STEP class through the college’s online process
- Submit proof of registration or waitlist status within 24 hours of registering
- You are accepted into the STEP program

After your counselor receives your proof of registration, a voucher will be submitted to the college to cover tuition and required fees (if we don’t have a billing arrangement with your college of choice or you must pay for your class ASAP so that you don’t get dropped by the college for non-payment, pay for your tuition and fees, keep your receipts and submit them to your counselor for reimbursement after the semester starts).

**CONTINUING STUDENTS**
Submit proof of grade from the previous semester

If we do not receive your passing grade or proof of withdraw for the previous semester we will withdraw our payment voucher from the college for the upcoming semester and you will be responsible for all tuition and fees.

**THOSE NEW TO STEP**
- Apply online for a STEP class
- Speak with your Ed Fund Career Counselor
- New Students
  Come to STEP Orientation
  There is a mandatory online orientation for new students that occurs before school starts. At this orientation you will receive directions about how to get your books, go over program guidelines and fill out required documents. The orientation also includes an Academic Success Workshop where you will learn techniques for organizing your time effectively, studying, note taking and testing well.

- Submit your signed Student Guidelines to your Counselor
- Receive the email from your Counselor with textbook Instructions
- Start School!
CAREER COUNSELING

Your Career Counselor will call or email you to check in regularly while you are in the program. You may be asked to provide your Career Counselor with the course syllabus and your scores on any tests, quizzes, and/or exams as you receive them. One time per semester they will meet with you for a mandatory check-in meeting to discuss your progress towards your career goal(s).

Your Counselor can also assist you with:

- Time management skills
- Test anxiety issues
- Study skills
- Identifying your short and long-term goals & assisting you to develop career plans
- Identifying local schools that have the training programs you are interested in
- Job search skills
- Resume building

If your grades fall below a B-, you should contact your Career Counselor to discuss your performance and strategize with him or her how to improve your grade.

TUTOR.COM

STEP students have access to FREE online tutoring through Tutor.com for their STEP class. If the Education Fund offers Tutor.com for your STEP class, we expect that you access it at least once.

What is TUTOR.COM?

- Tutoring is available online 24 hours a day.
- Each STEP student can get up to 2 hours per week for a maximum of 36 hours per semester, or 26 per quarter, unless otherwise approved.
- Work one-on-one in real time with an experienced tutor.
- You are to only use Tutor.com for your STEP class. You can not use it for any classes you are taking on your own.

When can I start TUTOR.COM?

- After the semester starts you will receive an email with:
  - Your username and password with a link to our page- www.tutor.com/edfund
  - If you do not receive the email contact your Ed Fund Counselor

What subjects does TUTOR.COM cover?

- English
- Math
- Physics
- Statistics
- Chemistry
- Anatomy & Physiology
- Microbiology
- Biology
STEP FREQUENTLY ASKED QUESTIONS (FAQS):

How do I get accepted for the next semester? You will be required to complete an online application to inform us what class you plan to take the following semester.

Is the Education Fund part of the Union? Is this paid for with my dues? No, The Education Fund is a Labor/Management Taft-Hartley Trust Fund benefit negotiated by employers and the unions as part of their collective bargaining agreements. These agreements require the employers to contribute to the Education Fund. We use this money to offer programs and classes at no charge to eligible employees.

I am having a hard time getting time off from my job to go to school. What can the Education Fund do to help me out? Although we work in partnership with your employer and the union, the Education Fund is a separate organization. We don’t have any say over job assignments, release from work or use of Education Leave. We encourage you to talk to your supervisor or department head and do your best to get them to support your education goals. You should also talk to the union. They can help you take advantage of the education benefits in your contract, including Education Leave.

KPTR (KAISER PERMANENTE WORKERS ONLY)

Please note that KP will be reimbursing the Ed Fund for STEP classes taken by KP employees if there are any unused monies left over in their KP Tuition Reimbursement benefit after the year has ended.

What is the KPTR benefit? Tuition Reimbursement is administered by KP and is separate from your Education Fund benefit. Benefitted employees are allotted $3,000 per year. This is a “use it or lose it” benefit. At the end of the year any unused benefits are lost to the employee. You are welcome to use this reimbursement benefit for any other classes you plan to take outside of the STEP program.

Why is KPTR reimbursing the Ed Fund? Many times KP employees enrolled in the STEP program may not have time to take any other classes on their own. Therefore, there are monies left over from the benefit that will be lost. If this is the case for you, KP has agreed to reimburse the Education Fund for the cost of your STEP class with the left over monies. Again, they will only reimburse us after the year has ended and you have already used what you need from the benefit. We will be reimbursed for the cost of the class with whatever is left over. This reimbursement will make the Education Fund stronger, allowing us to provide more services and put to work a benefit that often goes unused.

Will this affect my STEP class? Not at all. The Education Fund will pay for your STEP class regardless of whether you use this benefit for other non-STEP classes.

What do I have to do? There is nothing that you need to do for this process. We will be working with KP directly and bill them after the year has ended and you have used the funds that you need.

If you have any questions about this please contact your Education Fund Counselor.
It is the policy of the Education Fund to honor the human and civil rights of all persons served, to treat them with dignity and respect, ensure their safety, and to advocate for their access to services.

Confidentiality
The SEIU United Healthcare Workers-West & Joint Employer Education Fund (hereinafter referred to as the Education Fund) is firmly committed to students’ right to and maintenance of their confidentiality. We are also aware that, at times, it is both important and essential for us to share information with other professionals in order to provide the highest level of service to our students. Upon intake, all students are informed of the Education Fund’s Confidentiality Policy and are required to sign a release form for the exchange of information with educational institutions and partnering employers.

Educational or Academic Providers
In the course of working with students who are enrolled in educational programs, it may be necessary to exchange the following information with institutions or educational vendors:
- Names, contact information, and student identification numbers
- Assessment scores
- Transcripts and degree status
- Enrollment status, course schedules, attendance, and graduation date
- Grades/Progress reports, Academic standing
- Academic/Educational/Career Plans

Release of Information with Partnering Employers
At times, it is necessary for the Education Fund to share general information with our participating employers to verify employees’ employment and benefit status. The Education Fund does not share specific information about individual students’ academic performance with their employer, with one exception. If the student authorizes the Fund to access KP tuition reimbursement funds, the Fund is required to share the student’s final grades with KP’s Tuition Reimbursement department. We have been assured by KP that individual managers do not have access to this data. Hard and soft case files can be used only by Education Fund staff and contractors. Student files, and the information contained within them, will not be shared with others either verbally or in writing, without a completed Release of Information form on file.

Grievance
Students are made aware of the Education Fund’s Grievance Procedure during the Orientation/Intake process. In the event that a student and his/her Career Counselor cannot agree on a solution to a specific problem or issue, the student may request to meet with the Director of Student Services. Please see the Education Fund Grievance Procedure for a full description of this process.

Non-Discrimination Policy
The Education Fund affirms that it will neither discriminate against nor treat with inequity any employee or applicant for employment/training on the basis of race, color, religion, gender, sexual orientation, national origin, age, or political belief.

Sexual Harassment Policy
The Education Fund is committed to providing its employees and students an environment free from sexual harassment. Sexual harassment policy follows the guidelines available to employees including applicable collective bargaining agreements or Title VII of the Civil Rights Act of 1964.

Drug-Free Workplace Policy
Consistent with the U.S. Drug-Free Workplace Act of 1988, the Education Fund is committed to maintaining a drug-free workplace environment. All students are covered by this act and are prohibited from using illegal drugs, also known as controlled substances. In addition, consuming alcohol during program courses and on-the-job is prohibited.
AUTHORIZATION FOR RELEASE OF INFORMATION

Last Name ____________________  First Name ___________________________  MI____

Student ID _________________________________

EDUCATIONAL/ACADEMIC RELEASE
I authorize and consent to the release of any and all of the following information to the SEIU UHW-West and Joint Employer Education Fund/Shirley Ware Education Center (herein after referred to as the Education Fund), and its partnering educational providers, for the duration of my enrollment in sponsored programs. I understand that the Education Fund, and its partnering educational providers, must follow all applicable state and federal laws, rules and regulations that apply to student records. Consequently, I understand that all information contained in the records that is personally identifiable to any student shall be kept confidential and not released except upon prior written consent of the student or upon the lawful subpoena or other order of a court of competent jurisdiction. Information I authorize to be released to and from the Education Fund include: (Please check all)

- Enrollment Status
- Phone and Address
- Graduation Date
- Course Schedule
- Academic Transcript
- Grades
- Attendance (in class, lab, and tutoring)
- Academic Standing
- Degree Status

Purpose of disclosure:
- School/Course Admission
- Case Management
- Scholarship/Financial Assistance

I hereby authorize (the college(s) you plan to attend) ________________________________ to release any and all information, including but not limited to confidential information, about me contained in the college records, and any and all other academic records. I agree to hold the above-named schools and their employees harmless for any unauthorized use of my student records obtained by the above named party(ies).

Specify School Year to be verified ____________________________.

RELEASE INFORMATION TO:
Lai-San Seto  
Assistant Director
SEIU UHW-West & Joint Employer Education Fund
360 22nd Street, 2nd Floor
Oakland, CA 94612

Student Signature_________________________________          Date __________
RELEASE OF INFORMATION WITH PARTICIPATING EMPLOYERS

I agree that the following information can also be shared between my employer and the Education Fund. I understand that specific information related to my academic performance will not be shared by Education Fund staff with my employer. (Please check all)

- Enrollment Status
- Hourly Wage
- Job Title
- Degree Status
- Course Schedule
- Phone and Address
- Hours Worked
- Hire Date
- Attendance
- Academic Standing
- Graduation Date
- Grades

Student Signature_________________________________          Date _________

CAREER COUNSELING RELEASE

I understand that while I am enrolled in an Education Fund class or program, I will be assigned a Career Counselor who will support me in my efforts. I am aware that Education Fund Career Counselors adhere closely to the ethical standards established by the American Counseling Association (www.counseling.org). I understand that in keeping with these standards, my right to confidentiality will be honored, and my records, including the results of any career assessments, will be kept confidential.

I understand that the law requires Career Counselors to breach confidentiality when there is reason to believe that there is immediate danger of harm to myself or others, including the possibility of child or elder abuse. In addition, I understand that the Education Fund may require Counselors to report information that I reveal regarding significant issues with a school with which the Education Fund has a relationship, as well as information that may impact me or other Education Fund students academically. For example, if I inform my Counselor that a faculty member or staff person at such a school has engaged in unprofessional or illegal behavior, my Counselor may be required to tell his or her manager, as this could affect the school’s contractual relationship with the Education Fund, and/or the academic standing of other Education Fund students.

I am aware that Education Fund Career Counselors are solely responsible for providing me with career and academic counseling, and are not permitted to act as Licensed Clinical Social Workers, Psychiatrists, Psychologists, Substance Abuse Counselors, or Marriage and Family Therapists. I understand that if questions or issues that are beyond the scope of practice of my Career Counselor arise during the Career Counseling process, I will be referred to an appropriate professional.

Student Signature_________________________________          Date _________

MEDIA/PHOTO RELEASE

I hereby grant permission to the SEIU UHW-West & Joint Employer Education Fund to use my image for the display, distribution, publication, transmission, or otherwise use of photographs, images, and/or video taken of me. I agree that these images may be used by the Education Fund for a variety of purposes and materials that include, but may not be limited to, printed materials such as catalogs, brochures and newsletters, videos, and digital images such as those on the SEIU UHW-West & Joint Employer Education Fund website. I further agree that these images may be used without further notifying me.

Student Signature_________________________________          Date _________
GRIEVANCE PROCEDURE

The Education Fund wishes you success in whichever programs you have chosen to assist you in obtaining your employment/career goals. Should you have questions or concerns while participating in our programs, please talk with your Career Counselor. If you have a grievance or complaint, you should pursue the following procedure:

- Try to resolve the situation on a one-on-one basis with the individual with whom you have a problem or complaint or grievance. You should follow the “chain of command.”

- Report complaint/grievance to an Education Fund Career Counselor.

- Grievances/complaints concerning a college instructor/employee will follow the grievance procedure for that specific college.

- Grievances/complaints involving your employer should be reported to a union staff person/steward and will follow the grievance procedure as outlined in the collective bargaining agreement.

- Grievances/complaints concerning the Education Fund will be resolved as follows:

  Step 1. The student shall first confer with the Career Counselor and attempt to settle the matter.

  Step 2. If the grievance or complaint is not thus settled, the student shall confer with Lai-San Seto, Assistant Director, or a designated representative, and attempt to settle the matter.

  Step 3. If the grievance is still not satisfied, the student can address his/her concern in writing to the Education Fund Executive Director (360 22nd Street, 2nd Floor, Oakland, CA 94612). S/he will respond within 60 days of receiving the notice. The Executive Director’s decision shall be final.

I have read and understand the above grievance procedure.

____________________________________________________________________
Signature                                                 Printed Name                                                 Date
STUDENT AGREEMENT

Your success in this program depends on you taking responsibility for your educational/training experience.

The following contract details your responsibilities:
1. By the end of the first week of the semester, confirm with your Counselor that you have attended the first day of class and do not plan to drop it. If we don’t receive this confirmation we will withdraw our payment voucher from the college and you will be responsible for all tuition and fees.

2. Demonstrate a strong commitment to completing your class successfully, attend all classes, complete all your assignments, and study regularly.

3. Notify your Career Counselor immediately if your grade falls below a B- or if you are placed on academic probation.

4. Update your Career Counselor immediately if there are any changes in your schedule which could impact your academic performance.

5. Check in once a month with your Counselor, either by phone or email & once a semester have an in depth discussion about future education goals.

6. If the Education Fund offers Tutor.com for your STEP class, we expect that you access it at least once

7. Notify us which class you plan to take the following semester by applying online before the deadline.

8. Fill out necessary forms, evaluations, release of information, surveys and provide documentation to prove eligibility for this program. Misrepresenting facts or falsifying records related to application, enrollment and information exchanged during meetings with Education Fund staff will lead to removal from the program.

9. Submit your final grade(s) or proof of withdrawal for your STEP class(es) within two weeks of the end of the semester.

10. Your participation in this program may require that you are available for interviews with auditors, your employer, your union, and Education Fund staff, after completion of the program.

11. The Education Fund will only pay for the required books and online materials for your STEP class up to $350. You alone are responsible for any costs related to supplies, recommended books, and any required texts that exceed $350.

12. PLEASE NOTE: In accordance with the Education Fund’s Academic Sanctions policy, if you fail to complete your class successfully, you will be deemed ineligible to enroll in future programs for a period of one year, unless you are explicitly excused by the Education Fund Executive Director.

YOUR SIGNATURE INDICATES THAT YOU HAVE READ, UNDERSTAND, AND AGREE TO THESE STUDENT REQUIREMENTS.

_______________________________________________  _______________________________
Signature                                      Printed Name

Date
STEP STUDENT CHECKLIST

☐ Apply online for the STEP program

☐ Make Sure you are Enrolled at the Community College & have a registration date

☐ Speak with your assigned Ed Fund Career Counselor (New students only)

☐ Receive the Next Steps email from your Ed Fund Counselor

☐ Register for your Class

☐ Email or Fax a copy or your schedule to your Counselor within 24 hours of registering

☐ Attend STEP Online Orientation (New students only)

☐ Email or Fax in your signed Student Guidelines to your Counselor (pages 9-12 of Handbook)

☐ Receive the email from CC that tells you when you can pick your textbooks at the bookstore

☐ Start Class!

☐ Confirm with your Counselor the first week of school to let him/her know you are staying in class