

EDUCATIONAL GUIDELINES

I. **TRUST POLICY:**

- A. To encourage beneficiaries, their spouses, and dependents to obtain the skills necessary to participate in the modern, commercial, and industrial sectors of the economy as owners, entrepreneurs and employees.

II. **IMPLEMENTATION OF POLICIES:**

- A. Funding shall be from the income earned by the Trust up to a maximum of \$135,000 each calendar year.
- B. An Education Committee has been established.
- C. The Education Committee will:
1. Consist of two (2) Trustees members appointed by the Chairman of the Board of Trustees.
 2. Prepare and recommend educational policies for Board Consideration.
 3. Review and approve applications, when necessary, to assist the Trust administrators in determining whether an application meets the criteria for an award.

III. **EDUCATION GUIDELINES:**

- A. Who may apply?
1. Any Trust beneficiary desiring to attend:
 - a. 2-4 year College or Graduate School.
 - b. Business College, Vocational and/or Trade School, i.e., beautician, auto, nursing, travel, art, modeling, etc., where certification, licensing or continuing education.
 - c. 3-4 year Apprentice Program, i.e., welding, carpentry, etc.
 - d. Extension courses (for college credit).

- e. Other courses or programs dealing with Native culture (for college/certification credit).
 - 2. Any individual who is the spouse, or dependent of a Trust beneficiary desiring to attend the above-named programs.
 - 3. Any Trust beneficiary wishing to enroll a dependent in early childhood education programs, remedial programs, or educational services that lead to better educational outcomes, with exception of afterschool programs, daycare, or sports activities.
- B. Where should an individual apply?
- 1. An individual should request an application and submit such to Educational Trust, P.O. Box 220888, Anchorage, AK 99522. Any questions, call Jenny Evans at 907-727-2585 or email jennykevans@gmail.com.
- C. When should an individual apply?
- 1. Applications are processed on a first come, first serve basis as determined by the date a completed application is received by the Haines Educational Trust office until the income earned by the Trust up to a maximum of \$135,000 is distributed.
 - 2. An individual should apply by June 30. An individual may apply prior to this date.
 - 3. Applications received after June 30 will be processed on a first come, first serve basis depending on fund availability. The Educational Trust will distribute the income earned by the Trust up to a maximum of \$135,000.
 - 4. An individual must allow thirty (30) days for application processing.
 - 5. If you are continuing student, you must submit a new application for each school year by June 30.
- D. How much may be granted?

Trust Units	Yearly	Lifetime
01+	\$5,000.00	\$30,000

- E. How will education distributions be made?
- 1. Education distributions are made on a first come, first serve basis as determined by the date a completed application is received by the Educational Trust office until the income earned by the Trust up to a maximum of \$135,000 is distributed.

2. Education distributions shall be sent to the institute's admission or financial aid office. If a student has paid for and completed courses, reimbursement will be processed upon submission of the school's receipt showing payment for tuition, fees and books, and an official transcript. Such reimbursements shall not exceed the recipients benefit entitlement and shall be submitted within 12 months of course completion.
 3. After the first education distribution is paid, future education distributions will be paid after the Trust has received the previous term's official transcript or certificate of completion, providing the student is within these guidelines.
 4. Educational distributions made for educational and remedial treatment for substance addiction will be made within one year of service either to the facility providing the services or by reimbursement to the applicant.
 5. For students with full-time status, schools will be instructed to release any unused funds directly to the student for use towards living expenses. For students with part-time status, schools will be instructed to return any unused funds to the Educational Trust.
- F. When will education distributions be discontinued?

1. When a student earns less credit hours AND/OR receives a GPA of less than 2.0 for the period funded, per the approved application, it will be considered an infraction. The Trust will no longer disperse payments until the student amends the infraction.
 - a. To amend the infraction, in a subsequent period from the infraction, the student must earn the equivalent amount of credit hours funded in the semester of the infraction while completing that semester with a GPA of 2.0 or higher. The Trust will not refund the student for credit hours taken to amend the infraction. Once the infraction is amended, the student will be eligible to apply for funds.

Example 1: The approved application stated that the student was to take 12 credit hours and maintain a semester CPA of 2.0. However, the student received a semester GPA of 1.9. The 1.9 semester GPA would constitute as an infraction. The student would not be eligible to receive funding from the Trust until the infraction was amended. To amend the infraction, the student would have to complete a semester of 12 credit hours while maintaining a GPA of 2.0 or higher for that semester. The Trust will not refund the student for 12 credit hours taken to amend the infraction.

Example 2: The approved application stated that the student was to take 12 credit hours and maintain a semester GPA of 2.0. The student received a semester GPA of 2.0 but only earned 9 credit hours. The 9 credit hours earned would constitute as an infraction.

The student would not be eligible to received funding from the Trust until the infraction was amended. To amend the infraction, the student would have to completed 12 credit hours while maintaining a GPA of 2.0 or higher. The Trust will not refund the student for 12 credit hours taken to amend the infraction.

2. When the lifetime total of allotted funding is reached: May increase if beneficiary amount increases.
 3. A beneficiary has only one lifetime limit for his or her spouse regardless of the number of different spouses the beneficiary may have.
 4. No exceptions will be made to the limits by the Board of Trustees.
 5. When student is expelled or dismissed.
 6. When funding reaches maximum allowed for the number of Trust units held for any calendar year (January 1 to December 31).
 7. If a student is dismissed from or fails to enroll in school and does not reimburse the Trust, that student will not be eligible for future education distributions.
 8. **It is the student's responsibility to see that any remaining unused portion of the education distribution is returned from the school to the Educational Trust, P.O. Box 220888, Anchorage, AK 99522.**
- G. Miscellaneous.
1. If expelled or dismissed, but student is accepted or reinstated to an institution, payments may be continued.
 2. The student may reimburse the Educational Trust for incomplete or withdrawn credit hours based on the per credit hour cost.
 3. **The Trust beneficiary, or Trust beneficiaries, must complete and sign item 20, Education Distribution Acknowledgment, on the application. THIS SECTION MUST BE COMPLETED BY THE TRUST BENEFICIARY (OR BENEFICIARIES) WHO IS THE PERSON HOLDING THE TRUST UNITS.**

Includes revisions adopted by Trustees on the following dates:

February 17, 2007
June 3, 2014
December 8, 2020
December 11, 2021