

# California State University, Long Beach Research Foundation

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## Operational Policies and Procedures

### CSULB RESEARCH FOUNDATION EDUCATIONAL ASSISTANCE PROGRAM

Policy or Procedure Authorization by: **Brian Nowlin**

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Manager Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Revision drafted by: Stephanie Moreno 7/1/2008, 6/1/2009, 4/8/2010, 8/20/2014

#### PURPOSE

The purpose of this program is to promote career and professional development for eligible staff employees and their dependents through the CSULB Research Foundation Educational Assistance Program.

#### STAFF ELIGIBILITY

The program is available to full-time regular and part-time regular CSULB Research Foundation employees upon completion of six (6) months of employment in an eligible category.

#### EMPLOYEE EDUCATIONAL ASSISTANCE PROGRAM

The CSULB Research Foundation Educational Assistance Program allows eligible CSULB Research Foundation employees to receive reimbursement of the State University tuition enrollment fee (other fees excluded) equivalent to six (6) units of instruction at the prevailing CSULB State University rate per semester (Fall Academic Semester and Spring Academic Semester). All classes must either be taken for grades (C or better) or for credit/no-credit (proof of passing required). Course work completed must be in pursuit of an individual's initial Bachelor's degree, Master's degree and/or credential.

Since this benefit is entirely funded by direct program funds, approval is contingent upon availability of funds, program sponsor approval (if required by sponsor) and Project Director approval. Written approval for Educational Assistance must be received by the Research Foundation Human Resources Department prior to course enrollment. Reimbursement is not limited to the CSU system. Educational Assistance Program requests based upon non-CSULB academic calendars may submit a total of two (2) requests per CSULB academic year – one (1) equivalent to the CSULB fall semester and one (1) equivalent to the CSULB spring semester.

Employees who wish to take classes during normal business hours must have the prior written approval of their Director/Manager in order to alter their work schedule. A copy of this approval must be submitted to Research Foundation HR for documentation in the employee's personnel file. The employee will be required to either make-up the time spent away from work or use accrued vacation or OPA hours in order to be compensated.

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If the employee chooses to take classes in addition to those covered under the Educational Assistance Program, the employee will be responsible for all fees associated with the additional units/classes. The employee is responsible for all late registration/course fees if appropriate registration deadlines are not met.

### DEPENDENT EDUCATIONAL ASSISTANCE PROGRAM (Effective July 1, 2008)

Employees who are eligible for the CSULB Research Foundation Educational Assistance Program can transfer their existing benefit maximum of six (6) units to a dependent child/spouse/domestic partner. The eligibility requirements for the employee's dependent child/spouse/domestic partner are subject to the following conditions:

- Employee's dependent child/spouse/domestic partner must be claimed as a dependent on the employee's health benefits or Income Tax returns. (Copy of necessary documentation will be requested for verification purposes.)
  - **Dependent Child** - Dependent child is defined as 1) your child or stepchild under the age of twenty-three (23) and who has never been married 2) a child living with you in a parent-child relationship who is economically dependent upon you, under the age of twenty-three (23) or above who is incapable of self-support due to a disability which existed prior to age twenty-three (23).
  - **Dependent Spouse** - The benefit for a spouse is contingent upon the employee being legally married while collecting Educational Assistance. (Copy of marriage certificate will be requested for verification purposes).
  - **Dependent Domestic Partner** - The benefit for a domestic partner is contingent upon the employee having a Declaration of Domestic Partnership on file with the California Secretary of State. (Copy of necessary documentation will be requested for verification purposes.)
- Courses taken by a dependent child/spouse/domestic partner have to be matriculated toward their initial Associates, Bachelors or Masters degree and be for credit toward degree requirements.
- Educational Assistance eligibility may be transferred to only one (1) person per employee per semester, regardless of whether that individual uses the full entitlement of six (6) units.
- If both parents are employed by the CSULB Research Foundation and are eligible to transfer their educational assistance benefit to a dependent child, each employee may transfer the benefit. Therefore, it is possible for one (1) child to receive both benefits and be eligible to enroll in up to twelve (12) units on an educational assistance basis. Alternatively, each employee could transfer his/her benefit to a different child and each child would be entitled to six (6) units of reimbursement eligibility.
- Dependent reimbursement applies only to certain fees incurred by California residents. Thus, the dependent child/spouse/domestic partner who does not meet established in-state residency requirements (and those who do not qualify for classification as a resident in accord with the provisions of Title 5, Section 41910, California Code of Regulations) will be responsible for paying non-resident tuition charges based upon the total number of units enrolled.
- A dependent child/spouse/domestic partner taking units in addition to the approved CSULB Research Foundation assisted units shall be responsible for paying all fees associated with the additional units/classes.
- Normal academic standards must be maintained by the dependent child/spouse/domestic partner in order to continue participating in the Educational Assistance Program.

### TAX ISSUES

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According to the Internal Revenue Code sections under the CSULB Research Foundation Educational Assistance Program, the following tax-free or taxable benefits are available to CSULB Research Foundation employees and their children, spouses and/or domestic partners:

Eligible Participant	Course Level(s)	Tax Status
CSULB Research Foundation Employee	Undergraduate and Graduate	Nontaxable
Employee's Spouse/Dependent Child	Undergraduate <b>Graduate</b>	Nontaxable <b>Taxable</b>
Employee's Domestic Partner	<b>Undergraduate</b> <b>Graduate</b>	<b>Taxable</b> <b>Taxable</b>

\*Nothing contained herein should be construed as tax advice. Employees are advised to consult their tax advisor regarding taxes associated with this benefit.

### SEPARATION/CHANGE OF EMPLOYMENT

Employees who separate from the CSULB Research Foundation or otherwise become ineligible (i.e., change in employment status) prior to completing the semester and submitting the necessary reimbursement documentation shall become ineligible for the Educational Assistance Program and will not be reimbursed.

### REQUEST/APPLICATION PROCEDURES

Prior to enrolling in a course, the employee must complete and submit the CSULB Research Foundation "Request for Educational Assistance Form" (form available on Research Foundation website or from Research Foundation HR Department) to the Research Foundation Human Resources Department with necessary back-up documents for approval. These documents include, but are not limited to the following:

- Program description
- Course description
- Verification of dependency status (as applicable)
- Signature approval from the employee's program sponsor (if required by sponsor) and Project Director/ Manager associated with the employees' department

\*Program description and course description information may be copied from a course catalog or the institution's website.

### REIMBURSEMENT PROCEDURES

Reimbursement by the CSULB Research Foundation for pre-approved academic units will only be made once proof of successful course completion has been submitted. For reimbursement, the employee is required to submit the following documentation within one (1) month of course completion:

- Proof of successful course completion (grade of C or better; or proof of "passing" the course if the course was taken as credit/no credit)
- Itemized proof of course payment/registration