

GUIDELINES

Education Assistance Fund for Administrative/Professional Staff and Non-Bargaining Unit Staff Harvard Human Resources

**** Late applications received after the stated deadlines below will not be accepted ****

The University Benefits Committee has created a fund to reimburse administrative/professional staff and non-bargaining unit staff for tuition fees and professional development registration costs that fit into one of the four categories below. Funding for staff development is first and foremost the responsibility of each school or department. The Education Assistance Fund is intended to supplement this training and increase opportunities for staff to further their education.

Eligibility

In order to be eligible for an Education Assistance Fund award:

(1) You must be a regular administrative/professional staff member or non-bargaining unit staff working at least 17.5 hours per week, and still employed by Harvard University at time of reimbursement AND

(2) You must have completed your three-month orientation and review period before the start date of your course or conference AND

(3) You must fall into one of the four categories described below.

Category 1. Completed a class outside of Harvard in connection with a job-related certificate or degree program (Example: a department manager who develops budgets and financial plans working toward a management degree at Northeastern or Bentley);

Category 2. Completed a class outside of Harvard in connection with a certificate or degree that may aid in pursuing a career at Harvard (Example: a major gifts officer working toward a finance or accounting degree at Boston College);

Category 3. If you work at any Harvard location outside of Boston or Cambridge, you are eligible for any type of class at a degree- or certificate-granting institution located closer to your workplace.

Category 4. Completed a seminar, professional meeting or conference related to advancing your career at Harvard. (Example: a grants and contracts administrator who attends Harvard's Program on Negotiation). Completed a Test-Prep. course in preparation for applying to a graduate program that will aid in pursuing a career at Harvard. Funding for this category is limited to the cost of registration fees only, and one program or event per fiscal year. Please note it may be necessary to contact your supervisor or department regarding your application under this category.

Eligibility and Amount of Awards

You are eligible for an award up to a maximum of three courses per fiscal year (July 1 – June 30 based on course end date). The amount of an award will be based upon the tuition paid by the applicant, the number and amount of previous Education Assistance Fund awards the applicant has received, and the total number of employees who apply vs. amount of funds available. Therefore, the award amounts are affected by the number of people who submit applications. You may apply to the Education Assistance Fund for either the same or a different course for which you are applying to TAP (Tuition Assistance Plan). For those courses which you plan to use TAP in addition to the Education Assistance Fund to pay for a course, you must subtract the amount reimbursed by TAP from the tuition cost.

The award will be based on the actual out-of-pocket tuition cost to the applicant. If the course you wish to take is covered by TAP, you must use TAP before applying to the Education Assistance Fund.

PLEASE NOTE: Education Assistance Fund awards are considered income by the federal government and therefore must be taxed as income according to federal regulations.

Application Procedure and Payment of Award

Fill out the entire application form. You must also include the following information:

- (1) course description (photocopy from the course catalogue is sufficient);
- (2) tuition information – this must include both:
 - i. documentation of receipt of payment AND
 - ii. itemization which shows the cost of the course for which you are applying (can be a photocopy from the catalogue of cost per credit or course, or itemization that is shown on the receipt).
- (3) a photocopy of an official transcript or other document showing grade, OR
- (4) a photocopy of certificate or other document indicating completion

Applications will be reviewed on a quarterly basis according to the schedule below. Application forms and appropriate documentation must be sent to the Harvard Human Resources, Education Assistance Fund, 124 Mt. Auburn Street, 3rd floor, Cambridge, MA 02138.

<u>Courses taken:</u>	<u>Application deadline:</u>	<u>Notification of award:</u>
July 1 – September 30	October 1	November 15
October 1 – December 31	January 9	February 15
January 1 – March 31	April 1	May 15
April 1 – June 30	July 1	August 15

All materials must be submitted to the Harvard Human Resources, Education Assistance Fund, 124 Mt. Auburn Street, 3rd floor, Cambridge, MA 02138 upon completion and must be submitted within the quarter that the course ends. The reimbursement will be included in your Harvard paycheck, and will be taxable as extra compensation. The tax due will be withheld at the time of reimbursement.

Notification of Award

All applicants will be notified in writing of whether or not they have received an award, as well as the amount. Notification will be sent via mail to the University address listed on the application after the deadline for that quarter (see Application Procedure for dates) – as soon as the committee has reviewed all applicants for that period.

For more information regarding the Education Assistance Fund, please call Harvard Human Resources at 617-496-8128.

Education Assistance Fund Late Application Policy

Applicants must submit their application within the quarter in which their course or seminar ends. The deadlines are strictly enforced and no late applications will be accepted. If information necessary to complete the application cannot be retained until after the deadline, the applicant should send in whatever information they have by the deadline, and notify the Education Assistance Fund office with an estimated date in which the missing information will be received. We will accept missing information up to 30 days after the deadline. Applications will not be considered until all information is complete.