



PURPOSE

The Educational Assistance Program ("Program") supports the career and professional development of eligible CSULB Research Foundation employees and their dependents by providing tuition assistance for approved, degree-applicable coursework.

ELIGIBILITY

Staff Eligibility

Eligible employees include:

- Full-time regular employees
- Part-time regular employees

Employees must have completed six (6) months of employment in an eligible category.

DEPENDENT ELIGIBILITY (FOR TRANSFERRED BENEFITS)

An eligible employee may transfer their benefit to one (1) dependent per semester, subject to the conditions described in the Dependent Educational Assistance section of this policy.

Eligible dependents include:

- Dependent child
- Spouse
- Domestic Partner

PROGRAM BENEFITS

Employee Educational Assistance

Eligible employees may receive reimbursement of the State University Tuition (enrollment fee only; other fees excluded) equivalent to up to six (6) units of instruction per semester at the prevailing CSULB State University rate during Fall and Spring semesters.

Course Requirements:

- Minimum grade of C or better or
- Credit/No-Credit with proof of passing

Coursework must be toward:

- An initial Bachelor's degree
- A Master's degree
- A credential program

FUNDING AND APPROVALS

This Program is funded by direct program funds and is subject to availability.

Approvals required:

- Program sponsor (if applicable)
- Project Director
- Written HR approval before enrolling

The program is not limited to the CSU system.

COURSEWORK DURING BUSINESS HOURS

Employees wishing to take classes during normal business hours must:

1. Obtain written approval from their Director or Manager
2. Submit approval to HR for the personnel file

Time away from work must be covered by accrued vacation or OPA hours.

ADDITIONAL UNITS AND FEES

Employees are responsible for:

- Units beyond the approved benefit
- Late registration or missed deadline fees

DEPENDENT EDUCATIONAL ASSISTANCE

Benefit Transfer

An employee may transfer the six-unit benefit to one dependent per semester.

If both parents are eligible for CSULB Research Foundation employees:

- Each may transfer benefits
- A dependent may receive up to twelve (12) units per semester

DEPENDENT DEFINITIONS AND CONDITIONS

Dependent Child

A child or stepchild under the age of 23 who is unmarried, or a dependent child age 23 or older who is incapable of self-support due to a qualifying disability.

Dependent Spouse

A spouse to whom the employee is legally married during the benefit period.

Dependent Domestic Partner

A domestic partner registered with the California Secretary of State.

Documentation verifying dependent status is required.

Dependent coursework must apply toward an initial Associate's, Bachelor's, or Master's degree.

Residency and Fees

- Reimbursement applies only to eligible fees for California residents
- Non-residents are responsible for additional non-resident tuition
- Units beyond the approved benefit are the dependent's responsibility

TAX TREATMENT

The following summarizes the general tax treatment under the Internal Revenue Code for benefits provided through this Program:

Eligible Participant	Course Level(s)	Tax Status
CSULB Research Foundation Employee	Undergraduate and Graduate	Nontaxable—up to \$5,250 annually
Employee's Spouse/Dependent Child	Undergraduate	Nontaxable—up to \$5,250 annually
Employee's Spouse/Dependent Child	Graduate	Taxable
Employee's Domestic Partner	Undergraduate and Graduate	Taxable

SEPARATION OR CHANGE IN EMPLOYMENT STATUS

Employees who separate from employment with the CSULB Research Foundation or otherwise become ineligible (e.g., status change) before completing coursework and submitting all required reimbursement documentation are not eligible for reimbursement under this Program.

HOW TO APPLY (BEFORE ENROLLMENT)

1. Complete the CSULB Research Foundation Request for Educational Assistance Form (available on the Research Foundation website or from HR).
2. Attach required documentation:
 - Program description*
 - Course description*
 - Verification of dependent status (if applicable)
 - Signature approvals from the program sponsor (if required by sponsor) and the Project Director/Manager for the employee's department.
3. Submit the completed request and documentation to the Research Foundation HR Department for approval prior to enrollment.

*Program and course details may be sourced from the institution's catalog or website.

REIMBURSEMENT (AFTER COURSE COMPLETION)

Within one (1) month of course completion, submit the following to HR:

- Proof of successful completion (grade of C or better, or proof of passing for credit/no-credit).
- Itemized proof of payment/registration for approved academic units.

ADDITIONAL NOTES

- This Program covers the State University tuition/enrollment fee only (other fees are excluded).
- Written approval must be on file before enrolling to be eligible for reimbursement.