



Secretariat

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Administrative instruction

Education grant and special education grant for disabled children

The Secretary-General, for the purpose of implementing ISA Staff Rule 3.14 hereby promulgates the following:

I. Education grant

Section 1 Eligibility

Staff members shall be eligible for the education grant in accordance with the provisions of staff rule 3.14 and this instruction.

Section 2 Conditions of entitlement

Eligible staff members may claim education grant when the following conditions are met:

(a) The child is in full-time attendance at an educational institution at the primary level or above while the staff member is in the service of the Authority. Education shall be deemed “primary” for the purposes of this instruction when the child is five years or older at the beginning of the school year, or when the child reaches age five within three months of the beginning of the school year;

(b) The entitlement shall terminate when the child ceases to be in full-time attendance at an educational institution, or completes four years of post-secondary studies, or is awarded the first recognized post-secondary degree, whichever is earlier;

(c) There shall be no entitlement beyond the scholastic year in which the child reaches the age of 25, unless the child’s education has been interrupted for more than one year by compulsory national service, illness or other compelling reason. In such cases, the grant may be extended for the period of interruption beyond the scholastic year in which the child reaches the age of 25.



Section 3
Admissible and non-admissible educational expenses

Admissible expenses

3.1 Expenses for full-time school attendance that are paid directly to the school or are certified by the school as being necessary for school attendance shall be admissible. They may include charges for daily group transportation to and from the school, if provided by the school or organized on a school-wide basis by a concern other than the school itself.

3.2 Expenses for board shall be admissible when a child attends an educational institution outside Kingston.

3.3 Expenses for prescribed textbooks shall be admissible when the educational institution certifies that the textbooks were not provided free of charge.

3.4 Expenses for private tuition in the mother tongue of the staff member may be admissible when the following conditions are met:

(a) Private tuition is given by a qualified teacher certified in the language of instruction who is not a member of the staff member's family;

(b) The staff member serves in a country whose language is different from his or her mother tongue;

(c) The child attends a local school in which the instruction is given in a different language from the staff member's mother tongue.

Non-admissible expenses

3.5 The following expenses shall be considered non-admissible, except as otherwise indicated below:

(a) Expenses for education received before a child reaches primary level, as defined in section 2(a) of the present instruction except where the child is three years or older and is in full-time attendance at a preschool or nursery which offers a regular programme of educational instruction certified as such by the school;

(b) Expenses for attendance at a free school or one charging only nominal fees. In such cases, however, expenses for midday meals and transportation may be reimbursed under section 3.1, boarding expenses may be reimbursed under section 3.2, and textbook expenses may be reimbursed under section 3.3 of the present instruction;

(c) Expenses for correspondence courses, except where in the opinion of the Secretary-General such courses are the only available substitute for full-time attendance at a school of a type not available at the headquarters of the Authority, or where such courses are related to academic subjects that are not included in the regular school curriculum but are required for the child's subsequent education. Subject to prior written approval, expenses incurred in those cases shall be treated as an admissible cost of attendance under section 4.1 of the present instruction;

(d) Expenses for private tuition, except when provided by a teacher qualified in the subject concerned who is not a member of the staff member's family, and when the private tuition is given in the following cases:

(i) For tuition in English where the mother tongue of the staff member is not English and the staff member is obliged to pay tuition for the teaching of English to a dependant child attending a local school in which instruction is given in English;

(ii) As a required supplement to correspondence courses for which expenses are admissible under section 3.5(c);

(iii) As a required supplement to the regular school programme, for special coaching in a subject taught by the school to make up for deficiencies attributable to the child's change of schooling as a result of expatriation or a change of the staff member's duty station, or for special coaching in an academic subject not included in the school curriculum but required for the child's subsequent education;

(e) Expenses for vocational training or apprenticeship, except when it involves full-time schooling, and provided in that case that the child receives no payment for services rendered;

(f) Expenses for summer courses, except when the school certifies that such courses are a prerequisite for further attendance during the subsequent regular school year or for the school's regular diploma.

3.6 All scholarships, bursaries or similar grants received by or for the child shall be deducted first from those education expenses which are not admissible, and the balance, if any, from the admissible educational expenses before the amount of the grant is computed under section 4 below. Financial assistance in the form of loans which have to be reimbursed need not be reported or deducted.

Section 4

Amount of the grant

4.1 When the child attends an educational institution at the headquarters, the amount of the grant shall be 75 per cent of the admissible costs of attendance up to the maximum education grant per child per academic year established from time to time by the General Assembly of the United Nations in respect of United Nations staff members;¹

4.2 When the child attends an educational institution outside the headquarters, the amount of the grant shall be as follows:

(a) Where the educational institution provides board, 75 per cent of the sum of the expenses for attendance and board up to the maximum per year and maximum grant per child per academic year established from time to time by the General Assembly of the United Nations in respect of United Nations staff members;²

(b) Where the educational institution does not provide board, the amount of the grant shall be the sum of the flat sum for board, plus 75 per cent of the expenses for attendance up to the maximum amounts and maximum grant per child per

¹ The most recent circular issued by the United Nations is ST/IC/2011/8, Annex, Column 2.

² ST/IC/2011/8, Annex, Column 1 (maximum admissible amount) and Column 2 (maximum grant per year).

academic year established from time to time by the General Assembly of the United Nations in respect of United Nations staff members;³

4.3 Admissible expenses for textbooks shall be reimbursed up to a maximum of 75 per cent of the fixed rates for the primary, secondary and post-secondary levels as set out in the information circular on the education grant issued by the Secretary-General.

4.4 When expenses for tuition in the mother tongue are admissible under section 3.4 of this instruction, up to 75 per cent of the expenses incurred may be reimbursed.

4.5 When expenses for summer courses are admissible under section 3.5 (f) of this instruction, they may be reimbursed as part of the admissible expenses incurred for the prior school year, subject to all applicable maximum amounts.

Section 5

Prorating of amount of the grant

5.1 The amount of the grant relating to expenses for school attendance shall be prorated in the proportion which the period of school attendance by the child, or the period of service of the staff member, bears to the full school year when the period of attendance or service covers less than two thirds of the school year.

5.2 The amount of the grant relating to the flat sum for board and the fixed rate for textbooks shall be prorated in the proportion which the period of attendance of service bears to the full school year, even when such period covers two thirds or more of the school year.

5.3 When prorating is required, it shall normally be effected in the proportion which the period of attendance or service bears to the normal school year. For that purpose, periods of more than 20 days shall be taken as a full month, and 11 to 20 days as half a month. Periods of 10 days or less shall be ignored. However, when the school charges fees at different rates for various parts of the year, this shall be reflected in prorating the amount of the grant.

5.4 No prorating shall be required where the staff member dies while in service after the beginning of the school year.

Section 6

Advances against the education grant

6.1 Staff members who are entitled to the education grant and who are required to pay all or a portion of the school fees at the beginning of the school year may apply for an advance against their entitlement.

6.2 Any paid advance shall be considered as due from the staff member until it is discharged by certification of the entitlement or is recovered from the staff member. Staff members are required to submit their claims for payment of the grant promptly, as required by section 7.1 of the present instruction. Recovery from the staff member's emoluments shall take place after the third and fourth month of the end of the academic year or on separation from service.

³ ST/IC/2011/8, Annex, Column 3 (flat sum for board), Column 6 (maximum admissible expenses for attendance only) and Column 2 (maximum grant per year).

6.3 No advance shall be authorized for subsequent school years until previous education grant advances have been cleared by settlement of the relevant education grant claim or repayment of the advance previously authorized.

6.4 Requests for education grant advances shall be made in accordance with the procedures set out in the information circular on education grant issued by the Secretary-General.

Section 7

Claims for payment of the education grant

7.1 Claims for payment of the education grant shall be submitted promptly upon completion of the school year. However, when the staff member's appointment expires earlier, the staff member shall submit the claim before the date of separation from service. When the child's attendance ceases before completion of the school year, the staff member shall submit the claim within one month of cessation of the child's attendance.

7.2 Claims for education grant shall be made in accordance with the procedures set out in the information circular on education grant issued by the Secretary-General.

Section 8

Education grant travel

8.1 Staff members eligible for education grant travel whose child attends an educational institution outside headquarters shall be entitled to travel expenses for the child for one round trip each scholastic year between the educational institution and the headquarters, or two round trips in the year in which the staff member is not eligible for home leave, subject to conditions set out below:

(a) The child's attendance at the educational institution is at least two thirds of the school year;

(b) The travel is undertaken during, or immediately before and after the school year;

(c) The child spends at least seven days at the headquarters;

(d) Travel expenses may not exceed the cost of travel between the staff member's home country and Kingston;

(e) Education grant travel may not take place within three months of travel on home leave by the child except that:

(i) at the staff member's request, home leave for the child and education grant travel may be combined providing the requirement of section 8.1(c) on minimum period of stay is met;

(ii) the three-month interval may be reduced to permit education grant travel to take place in the same year as home leave travel, or to allow the child to go to the educational institution following travel to join the staff member at the headquarters;

(f) In the event of a staff member dies while in service after the beginning of the school year, the entitlement to education grant travel shall continue until the end of the school year and may be authorized for travel between the educational

institution and Kingston, or another location, subject to the maximum allowed in section 8.1(d).

8.2 When, during a single school year, a child attends two schools, one at the headquarters and the other away from the headquarters, education grant travel may be authorized in respect of attendance away from the headquarters provided that attendance is for at least one term and there is a valid reason for the change of school.

8.3 In the school year in which the child completes the fourth year of post-secondary studies or is awarded the first recognized degree, travel may be undertaken during the school year or at its end, provided that the child has been in full-time attendance for at least two thirds of that year.

8.4 When a child is over the age of 22 and his or her dependency status has ceased, authorization of education grant travel to or from the headquarters after the end of the last school year for which the education grant is payable shall replace the one-way travel to the staff member's headquarters or home country otherwise authorized under staff rule 7.4(b).

8.5 (a) Return travel by the staff member or his or her spouse from Kingston to the place of study may be substituted for travel by the child or children when an education grant travel entitlement exists to and from Kingston, and it is not possible for a staff member's child or children to travel to Kingston on education grant travel, provided the following conditions are met:

- (i) The travel expenses borne by the Authority do not exceed the amount that would have been paid for the child or children. Other costs that may be payable, such as terminal expenses, are paid at the child rate;
- (ii) No travel time is granted, all working days away from the office are charged to annual leave; and
- (iii) the staff member or his or her spouse spend a minimum of seven days at the place of study;

(b) Staff members or their spouses may exercise only one return travel per year to a place of study of an eligible child under the provisions of this section. For administrative purposes, such travel shall be charged as education grant travel. Annual leave of a staff member taken for this purpose shall be approved subject to the needs of service.

(c) The education grant travel that may exist in respect of other children can be exercised by those children between their own place of study and the place of study of the child who the parent will visit, provided the expense borne by the Authority does not exceed the maximum that would otherwise have been applicable.

Section 9

Accuracy of information and record-keeping

9.1 When submitting a request for education grant advance or for payment of education grant, staff members shall ensure the accuracy of the information being provided to the Authority and promptly correct any erroneous information or estimates that they may have previously submitted. Documentation provided by an educational institution may not be altered by the staff member. Incorrect, untrue or

falsified information may result not only in the rejection of a claim and/or recovery of overpayments but also in disciplinary measures under the Staff Regulations and Rules.

9.2 Staff members shall retain, for a period of five years counting from the date of submission of the education grant claim, all substantiating documentation, such as invoices, receipts, cancelled cheques and bank statements documenting expenditures. Such documentation shall be produced if required in any audit or investigation.

II. Special education grant for disabled children

Section 10

Eligibility

Staff members shall be eligible for the special education grant in accordance with the provisions of staff rule 3.14(h).

Section 11

Conditions of entitlement

11.1 Eligible staff members may claim special education grant when the following conditions are met:

(a) The child is unable, by reason of physical or mental disability, to attend a normal educational institution and therefore requires special teaching or training, on a full or part-time basis, to prepare him or her for full integration into society;

(b) Or the child, while attending a normal educational institution, requires special teaching or training to assist him or her in overcoming the disability.

11.2 The entitlement shall commence from the date on which the special teaching or training is required and shall terminate when the child is awarded the first recognized post-secondary degree or up to the end of the academic year in which the child reaches the age of 28, whichever is earlier.

Section 12

Admissible educational expenses

The following educational expenses shall be admissible:

(a) Expenses required to provide an educational programme designed to meet the needs of the disabled child so that he or she may attend the highest level of functional ability. These expenses may include:

(i) Charges for teaching or training services;

(ii) Other costs or fees directly related to the educational programmes that are not optional or related to extracurricular activities, except for expenses for school supplies, uniforms, insurance, donations and contributions or similar charges;

(iii) Expenses for special equipment for educational purposes if not covered under health insurance;

(iv) Expenses for full board (food and lodging) in the case of a child attending an educational institution at the duty station when such boarding is an integral part of the educational programme;

(b) Expenses incurred for local transportation required for the disabled child.

Section 13

Amount of the grant

13.1 The amount of the grant for each disabled child shall be 100 per cent of the admissible educational expenses actually incurred up to the maximum overall amount of special education grant established from time to time by the General Assembly of the United Nations in respect of United Nations staff members;⁴

13.2 In the computation of the special education grant, the amount of admissible educational expenses shall be reduced by the amount of any benefits that may be available from other sources for the child's education and training, which shall be reported as required by section 15.1.

13.3 The grant shall be computed on the basis of the calendar year if the child is unable to attend a normal educational institution, or on the basis of the school year if the child is in full-time attendance at a normal educational institution while receiving special teaching or training.

13.4 If attendance of the child is for less than two thirds of the school year, or the period of service during which a staff member is eligible for the grant does not cover the full school year, the amount of the grant relating to expenses for school attendance shall be prorated in the proportion which the period of attendance or service bears to the full school year. Calculation of the grant for purposes of this section shall follow the provisions of section 5.

Section 14

Relationship with the regular education grant

14.1 When a disabled child is unable to attend a normal educational institution, or attends on a full-time basis a normal educational institution which provides the necessary special arrangements for the child, admissible educational expenses shall be reimbursed against the special education grant, regardless of whether the staff member would otherwise be entitled to a regular education grant in respect of the child.

14.2 When a disabled child is in full-time attendance at a normal educational institution and no special arrangements are made at that institution for the child concerned, reimbursement shall be subject to the following conditions:

(a) If the staff member is entitled to regular education grant with respect to the child, admissible expenses incurred at the educational institution shall be reimbursed against the normal education grant entitlement at the 75 per cent rate. Additional admissible educational expenses incurred for special teaching and training outside the educational institution shall be reimbursed against the special education grant at the 100 per cent rate. The combined total of the two types of

⁴ ST/IC/2011/8, Annex, Column 1.

grant shall not exceed the maximum overall amount of special education grant specified in section 13.1;

(b) If the staff member is not entitled to regular education grant with respect to the child, admissible educational expenses incurred for special teaching and training outside the educational institution shall be reimbursed against the special education grant at the 100 per cent rate, subject to the maximum overall amount of special education grant specified in section 13.1.

Section 15

Claims for payment of the special education grant

15.1 Claims for the special education grant shall be submitted in writing and supported by medical evidence satisfactory to the Secretary-General regarding the child's disability. The staff member shall also be required to provide evidence that he or she has exhausted all other sources of benefits that may be available for the education and training of the child in order to allow for computation of the grant under section 13.2 of this instruction.

15.2 When the child is not in school attendance, the claim for payment of the special education grant shall be submitted annually within one month of the end of the standard school year in the staff member's duty station. When the child is in school attendance, claims shall be submitted in accordance with the provisions of section 7.1 above.

15.3 The provisions of the regular education grant regarding advances and accuracy of information and record-keeping in sections 6 and 9 above shall apply to the special education grant.

15.4 Claims for the special education grant shall be made in accordance with the procedures set out in the information circular on education grant issued by the Secretary-General.

Section 16

Travel

16.1 When the needs of the disabled child require attendance outside the headquarters, travel expenses shall be paid for up to two round trips per school year between the educational institution and the headquarters.

16.2 In exceptional circumstances, travel expenses may also be reimbursed for one person accompanying the disabled child.

Section 17

Final provisions

17.1 This instruction shall enter into force on 1 February 2012.

17.2 Administrative instructions ST/AI/2007/02 and ST/AI/2007/02/Amend.1 are hereby replaced.

(Signed) Nii A. Odunton
Secretary-General