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ADMINISTRATIVE INSTRUCTION

To: Members of the staff

From: The Assistant Secretary-General for  
Personnel Services

Subject: EDUCATION GRANT

1. This administrative instruction is a revision of the previous instruction on education grant circulated under the symbol ST/AI/181/Rev.3 and Amend.1. Its main purpose is to give effect to the decision taken by the General Assembly at its thirty-first session in amending staff regulation 3.2, with effect from 1 January 1977, to provide for a revised schedule of education grant. The revised schedule is reflected in paragraph 5, subparagraphs (a) and (c), below. In line with that decision, the maximum rates of the grant payable in respect of private tuition for handicapped children and private tuition of mother-tongue are adjusted by increased amounts, as shown in paragraph 7, subparagraph (e)(v), and paragraph 8 below. In addition, paragraph 2 on advances against education grant is amended in the last sentence to simplify the procedure. Except as provided in paragraph 16 below, this revised instruction supersedes document ST/AI/181/Rev.3 and Amend.1 with effect from 1 January 1977.

Advances against education grant

2. Staff members who are eligible for education grant in respect of their dependent children and who are required to pay school fees at the beginning of the school year may apply for an advance against their entitlement to education grant by completing form P.27 (Request for advance against the education grant). Requests may be submitted prior to, or within two months after, the beginning of the school year. Requests will not normally be considered later in the school year. Any advance approved will be held as a charge against the staff member until it is discharged by certification of the entitlement by the Office of Personnel Services or is recovered. The advance will be recovered from the staff member's salary if a claim for payment of the grant is not submitted promptly at the end of the school year or on earlier separation from service. Recovery from staff members on the Headquarters payroll is made two months after the end of the school year, unless they are at a duty station away from Headquarters, in which case recovery is made

three months after the end of the school year. The amount of the advance will be the amount of the anticipated grant for each child for the intended period of attendance.

#### Claim for education grant

3. Claims for the payment of education grant should be submitted on form P.45 (Request for the payment of education grant) within one month of the completion of the school year, unless the staff member's appointment expires earlier, in which case a claim may be submitted shortly before the date of his separation from service. The claim must be accompanied by a certificate of attendance and by receipted school bills.

#### Certificates of attendance

4. The certificate of attendance must indicate the exact dates on which the school year began and ended, as well as the dates of the child's attendance. If the certificate and accompanying receipts are not in one of the official languages of the United Nations, a translation into English or French should be attached. Where possible, the certificate of attendance should be on form P.41 (Certificate of attendance and cost for education grant), which also covers the costs for which the grant may be claimed. Otherwise, certificates of attendance and receipted school bills, indicating the various charges in detail, must be certified by a responsible official of the school or educational institution on its official stationery or on paper bearing its seal.

#### Amount of the grant

5. Under staff rule 103.20 (d) and (e) the amount of the grant varies according to whether the child attends an educational institution AT or OUTSIDE the staff member's duty station, as defined in subparagraph (a) (iii) of the same rule, and whether or not the educational institution outside the duty station provides board.

#### Allowable costs for attendance AT the duty station

(a) When a child attends an educational institution at the primary or secondary level in the country of the duty station, the costs of attendance are allowed, but not the cost of board, except as provided in subparagraph 5 (b) below. The costs of attendance include charges for enrolment, registration, examinations, courses and diplomas, prescribed textbooks and such other costs directly related to the schools's programme or curriculum but not school supplies, equipment or uniforms, insurance, medical examinations, donations and contributions, or similar charges. Where local conditions justify their provision, charges for midday meals, if they are provided by the school, and 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, may also be included

in the allowable costs of attendance. The amount of grant when the child attends an education institution at the primary or secondary level in the country of the duty station shall be the sum of 75 per cent of the first \$2,000 of the cost of attendance, 50 per cent of the next \$1,000 and 25 per cent of the next \$1,000 up to a maximum grant of \$2,250 a year for each child.

(b) When a child attends an educational institution at the primary or secondary level in the country of the duty station but beyond commuting distance from the duty station itself, the cost of board, as well as the costs of attendance, may be allowed at the same rate as provided in subparagraph 5 (c) below, provided that the Secretary-General is satisfied that no school within commuting distance would be suitable for the child. Approval is normally given only with respect to field duty stations where local educational facilities are minimal.

#### Allowable costs for attendance OUTSIDE the duty station

(c) When a child attends an educational institution outside the country of the duty station and the institution provides board (food and lodging), all the costs allowable under subparagraph 5 (a) above are allowed, as well as the cost of board. The amount of grant is the sum of 75 per cent of the first \$2,000 of the cost of attendance and board, 50 per cent of the next \$1,000 and 25 per cent of the next \$1,000 up to a maximum of \$2,250 a year for each child. When the institution does not provide board, the amount of grant is \$750 plus the sum of 75 per cent of the first \$1,000 of the cost of attendance, 50 per cent of the next \$1,000 and 25 per cent of the next \$1,000 up to a total maximum of \$2,250 a year for each child.

6. The amount of any scholarships, bursary or similar grant received by the child should normally be taken into account in calculating the education grant. Such amount should be deducted from the total education expenses incurred for the child (including costs that are not allowable under paragraph 5 above and the cost of journeys between the school and duty station that are not paid for by the United Nations) before the education grant is calculated. In no case may the education grant exceed the amount payable on the basis of allowable costs only.

#### Costs not allowed

7. Certain costs may not be allowed because they are not considered to be costs of attendance. Other items may not be allowed because they are not related to activities or courses forming part of the regular school programme or curriculum. For this reason, summer courses will be allowed only if their attendance is a prerequisite for further attendance during the regular school year or for the school's regular diploma. In addition, as specified in staff rule 103.20, the grant is not payable in the following cases:

(a) Kindergarten or nursery school

The grant is not payable in respect of attendance at a kindergarten or nursery school at the pre-primary level. Where there is difficulty in determining whether attendance is at the pre-primary or primary level, it should be presumed to be primary from the school year in which the child reaches the age of six and presumed to be pre-primary during school years in which the child has not reached the age of five. The grant may be paid from the school year in which the child reaches the age of five, if it can be shown, on the basis of information provided by the school, that basic elements of a formal education are included in the instruction. No grant is payable if the attendance is not full time.

(b) Free school

The grant is not payable in respect of attendance at a free or public (state) school at the duty station. This does not preclude the payment of boarding fees, in accordance with the provisions of subparagraph 5 (b) above.

(c) University or similar institution

The grant is not payable in the case of a child attending a university or similar institution in the country of the duty station. This includes all educational institutions that require secondary education to be completed before a student is admitted and institution attended after completion of secondary education.

(d) Correspondence courses

The grant is not payable for correspondence courses, except:

- (i) Where such courses are, in the opinion of the Secretary-General, the best available substitute for full-time attendance at a school of a type not available at the duty station;
- (ii) Where such courses are related to academic subjects that are not included in the regular school curriculum but are required for the pursuit of the child's subsequent education;
- (iii) Where such courses are required for a handicapped child.

Subject to prior written approval, the cost of correspondence courses will be allowed to the extent of 75 per cent. Approval is not normally given for correspondence courses at the university level or in respect of children over 18 years of age who are not handicapped.

(e) Private tuition

The grant is not payable for private tuition, except:

- (i) For tuition of the mother-tongue, as provided in paragraph 8 below;
- (ii) For tuition of the language of the duty station, when prescribed by the local school as a pre-condition for admitting the child to the grade corresponding to the grade he reached elsewhere;
- (iii) As a supplement to correspondence courses allowable under subparagraph 7 (d) above;
- (iv) As a supplement to the regular school programme for special coaching in a subject taught by the school or in any additional academic subject not included in the school curriculum but required for the pursuit of the child's subsequent education;
- (v) Where such tuition is required for a handicapped child. In such cases, private tuition will be allowed only if it is given by teachers who are, in the opinion of the Secretary-General, duly qualified. The grant may be paid at 75 per cent of the tuition up to a maximum of \$600 a year for each child.

(f) Vocational training or apprenticeship

The grant is not payable for vocational training or apprenticeship, unless it involves full-time schooling; nor is it payable when the child receives payment for services rendered. The grant may also be disallowed under subparagraphs 7 (b) and 7 (c) above.

Tuition in the mother tongue

8. The costs of tuition for the teaching of the mother tongue to a child may be paid when the staff member serves in a country whose language is different from his own and is obliged to pay tuition for the teaching of the mother tongue to a child attending a local school at the duty station at the primary level or above in which the instruction is given in a language other than his own. Where attendance in a local school gives no entitlement to an education grant, 75 per cent of the cost of individual tuition in the mother tongue may be paid up to a maximum of \$600 a year for each child, except in the case of group language tuition, when the maximum is \$300 a year for each child. Where attendance in a local school gives entitlement to an education grant, the cost of tuition in the mother tongue, up to the maxima indicated in the preceding sentence, may be included in the allowable costs of attendance. No grant will be authorized for the teaching of the mother tongue by a member of the staff member's family.

Periods of attendance

9. A grant is only payable for the periods of attendance while the staff member is in service with the United Nations. Under staff rule 103.20 (f) and (g), when the period of attendance is less than two thirds of the school year or the period of service does not cover the full school year, the amount of the grant is prorated in the proportion which the period of attendance or service bears to the full scholastic year. For this purpose, the prorating may be done on the basis on which the educational institution charges fees for attendance for parts of a year or by reckoning fractions of a month consisting of more than 20 days as a full month and of 11 to 20 days as half of a month and ignoring fractions of 10 days or less. In cases where the school year is based on a period of 12 calendar months, the prorated entitlement may be calculated on the basis of the actual school year, as certified by the school, less the period of the normal summer vacation.

10. The grant is payable up to the day on which the child under 21 years of age ceases full-time attendance or up to the end of the school year in which the child reaches the age of 21. It always ceases on the last day of attendance and is not payable during the holiday that follows in either case. The period may be extended under staff rule 103.20 (c), if the child's education is interrupted during the period of entitlement for at least one year by national service or by illness. National service does not include periods for which a child enlists voluntarily or periods spent in ascertaining the obligation of military service.

Travel costs

11. Staff members eligible for education grant whose children attend an educational institution outside the duty station for not less than two thirds of the school year are entitled, under staff rule 103.20 (h), to the payment of the child's travel expenses for one round trip each scholastic year. Such travel expenses may also be paid where the attendance is at the primary or secondary level within the country of the duty station but beyond commuting distance from the duty station itself, provided that the Secretary-General is satisfied that no school within the commuting distance would be suitable for the child.

12. Education grant travel may begin either from the duty station or from the educational institution. The expenses shall not normally exceed the cost of travel between the staff member's home country and his duty station and will not be paid if the travel is unreasonable because of its timing in relation to other official travel of the staff member or his/her family members or because of the shortness of the period spent at the duty station, or if travel is not undertaken during the relevant school year. Three months is normally required between education grant travel and other authorized travel. The three-month interval, however, may be reduced in appropriate cases so as to permit education travel to take place in the same year of home leave travel. Two weeks is the minimum period required to be spent at the duty station.

13. Inasmuch as the grant is payable up to the end of the school year in which the child reaches the age of 21 years, travel may be undertaken any time during that year or at the end thereof, provided that full-time attendance was for not less than two thirds of the school year. However, if both the outward and inward journeys occur after the child reaches the age of 21, the one-way travel that may be allowed under staff rule 107.5 (b) at the end of the child's full-time attendance at a university will not be authorized.

14. Where a child during a single year attends two schools, one of which is at the duty station and the other away from the duty station, education travel costs may be paid in respect of attendance away from the duty station, provided that the child attends it for at least one term and, in the opinion of the Secretary-General, there is a valid reason for the change of school.

#### Rates of exchange

15. For the purpose of determining the entitlement of a staff member who incurs education expenses in a currency other than United States dollars, any payment made towards such expenses, within the costs allowed, will be converted into United States dollars at the official United Nations rate of exchange in effect on the date or dates the payments are made. The staff member's entitlement, less the amount of any advance, will be paid in the appropriate currency at the official United Nations rate prevailing on the date the entitlement is paid.

#### Application of the revised rates of education grant to the school year 1976/1977

16. In conformity with the provisions of staff rule 103.20 (f) and with the procedure followed in the past when the General Assembly had approved a revision in the amount of the education grant with effect from 1 January of a given year, the amount of the grant in respect of attendance at an educational institution during the school year 1976/1977 will be determined according to the revised rates of the grant set out in this instruction if attendance in 1976 commenced on or after 1 September 1976. For a school year beginning prior to 1 September 1976, the amount of the grant will be calculated on a proportionate basis, the period up to 31 December 1976 to be subject to the previous schedule of rates and the period from 1 January 1977 to be governed by the revised schedule of rates. No further request for advances under paragraph 2 above will be entertained in respect of the 1976/1977 school year.

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