

Higher Education Grant Program for Children of Employees

Colgate University currently grants an amount up to one-half of Colgate's tuition for any eligible child of an eligible employee who are matriculated and attend an accredited college or university in pursuit of an initial undergraduate degree on at least a half-time basis. In the case of two eligible parents, the total grant the two employees can receive together for an eligible child will not exceed one-half of Colgate's tuition. To be eligible, a child must be a natural or adopted child, or the dependent stepchild, of an eligible Colgate employee, as certified by the employee on a form approved by Colgate (and subject to the right of Colgate to request any information and/or documentation regarding the child as Colgate may, in its sole discretion, determine to be appropriate to review the child's eligibility or the tax status of any grant provided with respect to the child). This grant is available for a total of eight semesters or the equivalent if the child attends a school with a different academic schedule. For certain disabled children, possible exceptions to the half-time student requirement and the eight semester limit requirement are possible if the applicable requirements described in the "Special Requirements for Eligible Disabled Children" section of this policy that appears below are satisfied. This is a voluntary policy which is not legally binding and may be cancelled or changed without notice. Other requirements applicable to the program are listed below:

Application Process

An Application for Colgate Higher Education Grant for each academic year (typically Fall, Spring and Summer, not to exceed the approved amount of the annual grant) for which the grant is sought must be submitted by June 1st immediately preceding that academic year. Applications are available to download at <https://webedit.colgate.edu/docs/default-source/hr/cheg-application.pdf?sfvrsn=2> or by contacting the Human Resources Department at 228-7565 if computer access is not available. An e-mail reminder with a link to the application form will be sent to all employees on or about May 1 of each year.

Eligibility

A child is eligible for the Colgate Higher Education Grant if (in addition to the requirements described above):

1. On the date of enrollment at least one of the child's parents is:
 - a) a full-time employee of Colgate, defined as one who is in a position that is approved for no less than 1,462.5 hours per year ("Full-Time Employee"), and who had continuous service as a Full-Time Employee eligible for full Colgate benefits throughout the seven year period ending on the date of enrollment, or
 - b) deceased, and who at the time of death had continuous service as a Full-Time Employee eligible for full Colgate benefits throughout the seven year period ending on the date of death, or

- c) retired at an approved age in accordance with Colgate policy, and who at the time of retirement had continuous service as a Full-Time Employee eligible for full Colgate benefits throughout the seven year period ending on the date of retirement, or
 - d) age 60 or older and has at least seven years of continuous service as a Full-Time Employee eligible for full Colgate benefits.
2. The 1,462.5 hours per year requirement in 1(a)-(d) above shall be based on the twelve month period that ends (a) after the date on which the employee enters an eligible class, and (b) on each subsequent anniversary of such date.
3. Eligible employees who are on approved leaves of absence of not more than one year and periods of illness or disability during which payments were received under a Colgate disability plan shall be included in periods of continuous service and shall not be deemed to terminate the status of full-time employee.
4. The child must be under 25 years of age on December 31st of the academic year for which the grant is sought.
5. An eligible employee described in 1(a) above must, during the period that the grant is received, continue to be a Full-Time Employee eligible for full Colgate benefits.
6. An eligible employee will only be entitled to receive the grant under this program if they have first been classified as being eligible for the grant by Colgate's Human Resources Department.

Manner of Payment

1. Colgate shall provide payment for each eligible child who is matriculated for initial undergraduate work at an accredited college or university, except that payment in any one year shall not exceed the tuition and mandatory fees of the institution attended. The term "mandatory fees" shall exclude, among other things, room and board expenses and any other non-academic expenses.
2. Payment shall be made directly to the institution in which an eligible child is enrolled upon certification that the child is duly enrolled as at least a half-time student. Such certification should state the tuition and mandatory fees charged by the institution attended. Special rules apply if an eligible child starts, but does not complete, an academic semester or term, and the Colgate Human Resources Department should be contacted if that occurs. Receipt of institutional, state or federal aid does not affect the amount of the Colgate Higher Education Grant; but receipt of the Colgate Higher Education Grant may affect any institutional, state or federal aid offered by the institution where the child is enrolled (including Colgate University) and may reduce any financial aid award.

3. Except as otherwise provided in the “Special Requirements for Eligible Disabled Children” section of this policy that appears below, no eligible child shall receive such assistance for more than a total of eight semesters or the equivalent.

Procedures

To assist the University in financial planning for the allocation of sufficient funds to the Higher Education Grant Program, employees who plan to participate in this Program are requested to notify the Human Resources Department of their intention two years in advance of the proposed date of enrollment in an accredited educational institution. Please email benefits@colgate.edu stating your child’s name and expected high school graduation date. No separate form is necessary.

Special Requirements for Eligible Disabled Children

If a child satisfies the eligibility requirements of this policy and has a qualifying disability that has been approved by Colgate’s Human Resources Department (“Eligible Disabled Child”), and if that qualifying disability would have an impact on the Eligible Disabled Child’s progress toward degree completion, the applicable eligible employee, on behalf of the Eligible Disabled Child, can apply to Colgate’s Human Resources Department for a modification of the half-student requirement and/or the eight semester limit requirement. An application for such a modification must be approved by Colgate’s Human Resources Department, and any such approval will specify the minimum student enrollment level and/or or the maximum number of semesters that will be provided for the completion of the first baccalaureate degree of the Eligible Disabled Child based on their disability.

In order to apply for any such modification, an eligible employee must submit (1) a letter requesting the modification, and (2) documentation from a professional who is not a relative and who is qualified to provide a current and complete assessment of the Eligible Disabled Child’s educational needs and can establish in writing the correlation between the functional impact of the disability and any recommended accommodations related to the Eligible Disabled Child’s half-time student status and/or the eight semester timeline. A Disability Service Professional at the applicable university or college the Eligible Disabled Child is attending (or, if none, such other university or college official that is approved by Colgate’s Human Resources Department) would need to confirm in writing that the accommodation of a reduced course load resulting in a modification of the half-time student status and/or an extension of the eight semester timeline to complete the degree has been approved.

For purposes of this policy, the term qualifying disability shall mean a physical or mental impairment that substantially limits one or more of the major life activities, as determined by Colgate’s Human Resources Department.

Miscellaneous

A Colgate Higher Education Grant could, in certain circumstances, be subject to taxes (e.g., if a child does not qualify as a dependent under the Internal Revenue Code, the grant for that child generally will be taxable). If such circumstances are present, Colgate will withhold whatever taxes are required by applicable law. Colgate reserves the right to seek reimbursement of a grant paid if an eligible parent terminates employment and eligibility for the grant ceases. If any issue arises about how this program should be interpreted or applied, such interpretation or application will be made by Colgate in its sole discretion and will be binding upon all interested persons.

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