

US EPA ARCHIVE DOCUMENT



EPA'S NATIONAL NETWORK FOR  
ENVIRONMENTAL MANAGEMENT STUDIES  
FELLOWSHIP PROGRAM

**Catalog for 2012**

**Student Fellowship Program**



Visit the NNEMS website at [www.epa.gov/education/students.html](http://www.epa.gov/education/students.html)



# EPA's NATIONAL NETWORK FOR ENVIRONMENTAL MANAGEMENT STUDIES FELLOWSHIP PROGRAM

## Catalog for 2012

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# Introduction

## Background

The United States Environmental Protection Agency (EPA) established the National Network for Environmental Management Studies (NNEMS) Fellowship Program in 1986 to foster a growing interest among higher education students in environmental careers. The NNEMS program is a comprehensive fellowship program that provides students an opportunity to participate in a fellowship project that is directly related to their field of study. The NNEMS program is sponsored by the EPA Office of External Affairs and Environmental Education (OEAAEE).

The EPA has awarded more than 1,450 fellowships under the NNEMS program since its inception in 1986, and expects to award approximately 10 to 15 fellowships in 2012 for an estimated total of \$100,000.

## How to Use the NNEMS Catalog for 2012

The NNEMS Catalog for 2012 is divided into eight main sections:

- *Introduction* provides background information about the NNEMS program and identifies points of contact.
- *Overview of the NNEMS Program* describes the program and the types of fellowships offered, identifies the role of program coordinators, and discusses compensation.
- *How to Apply* lists the eligibility requirements and describes the application materials and application process.
- *Evaluation and Selection of NNEMS Fellows* discusses the evaluation of applications by staff of the EPA and the notification process.
- *Procedures to Initiate and Complete a Fellowship* identifies step-by-step actions a student must take to initiate and complete a fellowship.
- *Guidelines for NNEMS Fellows* explains the program guidelines that a student selected for a fellowship must follow.
- *Frequently Asked Questions* lists questions asked by applicants during previous years, as well as those from students awarded fellowships.
- *Catalog of 2012 Fellowships* provides detailed descriptions of each of the fellowships offered in 2012, including information about the EPA office sponsoring the project, the location and duration of the project, as well as the desired educational level of the student.

Several appendices are included to assist students who are interested in applying for a NNEMS fellowship. *Appendix A, Application Materials*, provides complete application materials. *Appendix B, NNEMS Program Coordinators*, provides a list of the schools or educational institutions that have a designated NNEMS Program Coordinator. *Appendix C - IRS Publication 970: Tax Benefits for Education*, provides information about taxes on a fellowship award.

## For Additional Information

Please contact:

Ms. Ginger Potter  
NNEMS Program  
Office of External Affairs and  
Environmental Education (1703A)  
U.S. Environmental Protection Agency  
1200 Pennsylvania Avenue, NW  
Washington, DC 20460  
Telephone: 202-564-0443

or:

visit the EPA's NNEMS website at:  
[www.epa.gov/education/students.html](http://www.epa.gov/education/students.html)

# Overview of the NNEMS Program

## Purpose

The purpose of the NNEMS program is to:

- Provide students with practical research opportunities and experiences in the EPA's program and regional offices and in its laboratories;
- Increase public awareness of and involvement in environmental issues;
- Encourage qualified individuals to pursue environmental careers; and
- Help defray the costs associated with the pursuit of academic programs related to the field of environmental protection, such as pollution control, science, engineering, technology, social science and specialty areas.

Students selected for NNEMS fellowships are offered a unique opportunity to gain research and training experience directly linked to their undergraduate or graduate studies. NNEMS fellows conduct research projects to augment their academic studies, which the EPA supports with financial assistance.

## Fellowships

Under the NNEMS program, a range of fellowship activities are offered to help students increase their knowledge of environmental issues while refining their professional skills. Typically, the NNEMS program offers approximately 30 to 40 fellowships, developed and sponsored by the EPA's Headquarters office in Washington, D.C. and in the EPA's 10 regional offices and laboratories throughout the United States. However, in 2012, the NNEMS program will only offer approximately 10–15 projects, a majority of which are sponsored in Research Triangle Park, North Carolina. The projects are specifically narrow in scope, allowing students to complete the fellowship while working full-time at the EPA during the summer or part-time during the school year. Typically, the research is conducted at the EPA office, although other arrangements can be made in certain circumstances.

The fellowships are organized among four categories:

- **Environmental Policy, Regulation and Law**

Fellowships offered in this category provide students an opportunity to review and evaluate existing policies and regulations, as well as conduct research related to the development of new policies. The projects may include a component that focuses on environmental compliance.

- **Environmental Management and Administration**

The topics of fellowships in this category focus on environmental management goals.

- **Environmental Science**

Fellowships in this category typically include direct participation in field studies and laboratory research. Environmental policy and regulation review requiring technical expertise is included in the Environmental Policy, Regulation and Law category described above.

- **Public Relations and Communications**

These types of fellowships include the review and analysis of public response to the EPA policies and regulations, as well as general public opinion of environmental issues. The projects may include the development of communication tools; for example, pamphlets and informational materials.

Detailed descriptions of the fellowships offered this year are provided in the section, *Catalog of 2012 Fellowships*, which begins on page 16 and on the NNEMS website at [www.epa.gov/education/NNEMS/2012projects.html](http://www.epa.gov/education/NNEMS/2012projects.html). Each fellowship is sponsored by an EPA project officer who serves as the main point of contact for the project.



Please note that in fiscal year 2012, the NNEMS program will only offer approximately 10–15 fellowships, a majority of which are sponsored in Research Triangle Park, North Carolina.

## Sample Project Description

Provided below is a sample project description from the NNEMS 2005 program. This example illustrates the content and format of the project descriptions that begin on page 17.

Project number	Title of project	Educational level of applicant
<p>Mission and activities of the sponsoring office</p> <p><b>PROJECT NUMBER: 2005-301</b></p> <p><b>Project Title</b> Diagnosing Causes of Impairment in Estuarine Systems</p> <p><b>Sponsoring Office</b> National Health and Environmental Effects Research Laboratory/Atlantic Ecology Division</p> <p><b>Office Mission/Responsibility</b> The mission of the Atlantic Ecology Division (AED) at Narragansett is to perform research to better understand and quantify the ecological effects of anthropogenic stressors on the coastal waters and watersheds of the Atlantic seaboard.</p> <p><b>Project Overview</b> Over the next several years, AED is responsible for developing diagnostic tools for assessing the causes of ecological impairment to estuarine and marine water bodies. This project involves conducting research which relates the effects of toxic chemicals, nutrients, pathogens, and clean sediments to these impairments. The focus of this research will be on ecosystems within the Narragansett Bay watershed.  The student will perform an independent and unique project involving the effects of anthropogenic stressors on estuarine and marine systems. Along with their independent project, the student will be involved in field sampling; preparing samples for analysis; and analyzing samples for toxicity, nutrients, dissolved oxygen, sediment grain size, and organic carbon.  The student's research project will include developing an experimental design, conducting the research, and completing a brief report.</p> <p><b>Project Goals</b> The student's involvement in the project will allow him or her to experience all aspects of the scientific process, from the conception of his or her specific scientific question to the summarization of what his or her research means. Further, through his or her participation in AED's program, the student will gain useful and valuable experience in estuarine and marine field sampling and sample preparation and analysis.</p> <p><b>Final Product of the Project</b> The student will develop a brief report summarizing the results of the project.</p>	<p>Name of the office sponsoring the project</p>	<p>Location at which project will be conducted</p> <p><b>Desired Level of Education</b> Junior to Graduate Student</p> <p><b>Project Location</b> EPA Region 1 – Narragansett, RI</p> <p><b>Preferred Project Period</b> 6/1/2005 to 5/31/2006</p> <p><b>Project Officer</b> Rob Burgess Kay Ho</p>
<p>Activities to be undertaken by the student</p>	<p>EPA's goals for the student and project</p>	<p>Final product to be developed by the student</p>
		<p>Name of the project officer</p>



## Compensation

All NNEMS fellowships are awarded directly to the individual students who are selected as fellows. The awards cannot be made to the educational institution at which the student is enrolled, although a student may request that the EPA submit payment of a portion of his or her tuition costs directly to the institution. See *Payment of the Grant* on page 12 for more information.

Students selected for a fellowship receive a grant award in the form of a stipend. The grant is paid in monthly installments based on the duration of the project. Grant awards reflect an individual student's level of education, as well as the location and duration of the fellowship. Even though students selected to receive NNEMS fellowships are grantees and not federal employees, the formula for the appropriate stipend amount is based on the current General Schedule (GS)-04 through GS-09 federal pay scale, and includes standard government locality rates. Freshmen students, for example, will be paid at the GS-04 rate; advanced graduate students at the GS-09 rate. For example, grants awarded for a 3-month full-time period would range from approximately \$6,000 to \$10,500 per award. The stipend will be increased to compensate for costs associated with travel or training for fellowships that require these activities. Information about the 2011 GS pay scale by localities is available online at [www.opm.gov/oca/11tables/indexGS.asp](http://www.opm.gov/oca/11tables/indexGS.asp). Please note that rates for 2012 will be adjusted according to the new GS scale.

There is no matching or cost sharing required of students awarded NNEMS fellowships.

## Role of Program Coordinators

Many colleges, universities and distance-learning organizations in the United States have identified NNEMS Program Coordinators. The Program Coordinators act as representatives of the NNEMS program by promoting the program on campus and assisting students in the preparation of their applications. For 2012, there are approximately 250 NNEMS Program Coordinators representing almost 200 educational institutions. A complete list of the NNEMS Program Coordinators is provided in *Appendix B, NNEMS Program Coordinators* and on the NNEMS website at [www.epa.gov/education/NNEMS/2012pc.html](http://www.epa.gov/education/NNEMS/2012pc.html).



**Please note: Any eligible student enrolled for academic credit at an accredited<sup>1</sup> 2- or 4-year college, university or distance-learning institution may apply for a NNEMS fellowship, regardless of whether or not there is a NNEMS Program Coordinator at his or her university.**

## Disclaimer

The EPA reserves the right to reject all applications for NNEMS fellowships and to make no awards or make fewer awards than anticipated. The EPA also reserves the right to make additional awards under this announcement consistent with Agency policy, if additional funding becomes available. Any additional selections for awards will be made no later than August 2012.

<sup>1</sup> The 2- or 4-year college, university or distance-learning institution must be accredited by a regional or national accrediting organization recognized by the U.S. Department of Education or the Council for Higher Education Accreditation.

# How to Apply

The following section provides step-by-step instructions for how to apply for a NNEMS fellowship, identifies the eligibility requirements, lists the application materials and provides an overview of the application process.

## The Application Process

Applying for a NNEMS fellowship can be summarized in four steps:

- Step 1:** Carefully read the section below, *Eligibility Requirements*, to determine whether you meet all of the general requirements, as well as those identified for specific student levels. If you are eligible, continue on to Step 2.
- Step 2:** Review the 2012 project descriptions that begin on page 17. Identify the project(s) in which you are most interested, as well as those in which you have attained the desired level of education as specified by the EPA. Please note that students are not allowed to develop or propose independent projects. If you would like additional information on or clarification of a specific project, please complete and submit the "Project-Specific Questions Form" that is available online at [www.epa.gov/education/NNEMS/2012projects.html](http://www.epa.gov/education/NNEMS/2012projects.html). A response to your question will be provided by email as soon as possible.
- Step 3:** Complete and submit a separate NNEMS application for each project identified under Step 2.
- Step 4:** Submit the completed application(s) by **January 30, 2012**.



A student selected for a NNEMS fellowship must complete additional documentation required by the federal government to apply for an official grant with the EPA. The steps required to process a fellowship and the grant award are lengthy (see *Procedures to Initiate and Complete a Fellowship* on pages 10 and 11 for more details).

## Eligibility Requirements

A NNEMS fellowship is available to any associate, undergraduate or advanced student who meets the general requirements listed below, as well as those identified for associate, undergraduate and advanced students.

### General Requirements

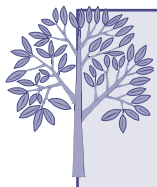
At a minimum, all applicants must be:

- A citizen of the United States, its territories or possessions, or lawfully admitted to the United States for permanent residency. The U.S. Citizenship and Immigration Services defines lawful permanent residency as any person not a citizen of the United States who is residing in the United States under legally recognized and lawfully recorded permanent residence as an immigrant, also known as "Permanent Resident Alien," "Resident Alien Permit Holder" and "Green Card Holder." A lawful permanent resident must provide his or her Green Card number on his or her application.
- Enrolled for academic credit at a 2- or 4-year college or university, or distance-learning institution accredited by a regional or national accrediting organization recognized by the United States Department of Education or the Council for Higher Education Accreditation.<sup>2</sup>
- Pursuing an educational program directly related to pollution control or environmental protection for the duration of the fellowship.

### Associate and Undergraduate Students

Students attending 2- or 4-year institutions or distance-learning institutions must meet the following requirements:

- 3.0 cumulative grade point average (GPA) based on a scale of 4.0 **at the time the application is due** (a GPA of 2.999 for example, is not sufficient), and
- Completion of at least four undergraduate courses related to the field of environmental studies.



#### Please note:

There are no exceptions to the requirement that applicants must have attained a 3.0 GPA at the time the application is due. Applicants whose GPA is below 3.0 based on the transcript enclosed with the application will not be eligible for consideration. For example, applicants with a GPA below 3.0 who submit applications in January with the expectation that their spring semester grades will increase their GPA to 3.0 are not eligible.

<sup>2</sup> Applicants are not required to be enrolled at the time the application is due, typically in January, but must be enrolled at the time of fellowship award, which is typically in April. For example, an applicant who graduated with an undergraduate degree a few years ago and is not currently enrolled in an academic program, may submit an application for a NNEMS fellowship if the applicant has applied to, been accepted at and is enrolled in a graduate school or a doctoral program that will begin in the fall of 2012. Please note that the EPA is prohibited from awarding fellowships to applicants who have been accepted, but have not enrolled, in an academic program.

## Advanced Students

Students enrolled in graduate or doctoral programs must meet the following requirements:

- Currently enrolled in a graduate or Ph.D. program or can provide proof of acceptance and enrollment to a graduate or Ph.D. program at the time of fellowship award<sup>3</sup>, and
- Completion of at least one semester of graduate or Ph.D. work, or at least four undergraduate courses related to the field of environmental studies.

### The following students are not eligible for a NNEMS fellowship:

- Federal employees, including those who are on “leave without pay” status.
- Undergraduate and graduate students who will graduate before the NNEMS fellowship is completed (students who complete their undergraduate studies before the end of a fellowship may apply if they are admitted and enrolled in a graduate program).
- Students enrolled in certificate programs.
- High school students.

## Application Materials

Application packages are submitted in hard copy as explained below. All students who are interested in applying for a NNEMS fellowship must submit a complete application package (an original and two copies) that includes:

- A completed NNEMS Application Form.
- A completed Standard Form 424 – Application for Federal Assistance (SF 424).
- A résumé.
- An official transcript for each 2- or 4-year college or university, or distance-learning institution attended. Official transcripts should be opened and photocopied as one original and two photocopies of the transcript are required for each complete application. If submitting applications for more than one NNEMS project, only one original transcript is required. Applicants should include in the application package the envelope in which the original transcript was provided.
- A completed NNEMS Reference Form. The Reference Form should be prepared by a professor or advisor who knows the applicant well and can specifically discuss the student’s aptitude and/or experience for the project. The Reference Form should be included with the application package; however, a reference submitted under separate copy will be accepted if it is postmarked on or before the application deadline. In this case, a note should be included in the application package indicating that the form is being sent separately.
- A completed and signed original NNEMS Disclosure and Waiver Statement.
- Verification of acceptance and/or enrollment in a graduate or Ph.D. program if the applicant is a graduating senior.

Applications must substantially comply with the application submission instructions and requirements or the application will be rejected. Applications deemed ineligible for funding consideration will be notified within 15 calendar days of the ineligibility determination.

The application package(s) may be submitted via mail, courier or express delivery. Although multiple copies of the materials are required, they may be submitted in the same package.

Applicants must submit all application materials listed above. Blank application forms are included in *Appendix A, Application Materials*, and may also be obtained on the NNEMS website at [www.epa.gov/education/students.html](http://www.epa.gov/education/students.html). Students must submit a complete application package (one original application package and two copies) for each project for which they are applying. Students may also wish to contact the NNEMS Program Coordinator at their school (see *Appendix B, NNEMS Program Coordinators*) for additional information and assistance.

All NNEMS applications must be postmarked by January 30, 2012 and submitted by mail, courier or express delivery to:

NNEMS Fellowship Program  
Tetra Tech EM Inc.  
1881 Campus Commons Drive, Suite 200  
Reston, VA 20191

<sup>3</sup> Applicants are not required to be enrolled at the time the application is due, typically in January, but must be enrolled at the time of fellowship award, which is typically in April. For example, an applicant who graduated with an undergraduate degree a few years ago and is not currently enrolled in an academic program, may submit an application for a NNEMS fellowship if the applicant has applied to, been accepted at and is enrolled in a graduate school or a doctoral program that will begin in the fall of 2012. Please note that the EPA is prohibited from awarding fellowships to applicants who have been accepted, but have not enrolled, in an academic program.

## Submitting Confidential Information

In accordance with 40 Code of Federal Regulations (CFR) 2.203, applicants may claim all or a portion of their application/proposal as confidential business information. The EPA will evaluate confidentiality claims in accordance with 40 CFR Part 2. Applicants must clearly mark applications/proposals or portions of applications/proposals they claim as confidential. If no claim of confidentiality is made, the EPA is not required to make the inquiry to the applicant otherwise required by 40 CFR 2.204(c)(2) prior to disclosure.

## Application Assistance and Communications

In accordance with the EPA's Assistance Agreement Competition Policy (EPA Order 5700.5A1), EPA staff will not meet with individual applicants to discuss draft proposals, provide informal comments on draft proposals, or provide advice to applicants on how to respond to ranking criteria. Applicants are responsible for the contents of their applications/proposals. However, the EPA will respond to questions from individual applicants regarding threshold eligibility criteria, administrative issues related to the submission of the proposal and requests for clarification.

## Submitting Multiple Applications

Students may apply for as many fellowships as desired. Complete application packages (one original and two copies) must be submitted for each fellowship project. Although multiple copies of the application materials are required, they may be submitted in the same package. Official transcripts may be photocopied if a student is submitting more than one application package. If more than one project application is submitted, the student must indicate the order of preference of each project on the Application Form.

## Applications by Current NNEMS Fellows

A student who is currently holding a fellowship may apply for a new fellowship in 2012. The existing fellowship, however, must be completed and the fellowship ended (see *Procedures to Initiate and Complete a Fellowship* on pages 10 and 11) before a student will be considered eligible to receive and begin a new fellowship.

## Submitting Applications for Consecutive Projects

Students may apply for consecutive projects, but the first fellowship must be completed before the second fellowship begins. For example, an applicant may apply for a project that ends in August as well as for a project that begins in September.

## Deadline for Applying

**The deadline for submissions of applications for 2012 fellowships is January 30, 2012.** All materials must be postmarked on or before January 30, 2012 to be eligible for consideration. Applications postmarked after January 30, 2012 will not be accepted.

## Mailing Address for Applications

Applications must be submitted via mail, courier or express delivery to:

NNEMS Fellowship Program  
Tetra Tech EM Inc.  
1881 Campus Commons Drive, Suite 200  
Reston, VA 20191

Although multiple copies of the application materials are required, they may be submitted in the same package.

## Confirmation of Application Receipt

Applications received with a postmark on or before January 30, 2012 will be reviewed by external reviewers to determine whether the application is complete and that the eligibility requirements have been met. During this time, applicants will receive an email at the email address identified in the "Current Email" and/or "Permanent Email" fields on page 1 of the NNEMS Application Form. If you do not receive a confirmation of application receipt email within 30 calendar days of the application deadline, please visit the EPA's NNEMS website at: [www.epa.gov/education/students.html](http://www.epa.gov/education/students.html) and click on the link to send an email to the NNEMS Fellowship Program.



**The deadline for submitting applications for 2012 fellowships is January 30, 2012. All hard-copy materials must be postmarked on or before January 30, 2012 to be eligible for consideration.**

## Evaluation and Selection of NNEMS Fellows

### Evaluation of Applications

NNEMS fellowships are awarded annually on the basis of the EPA's request for applications and established evaluation criteria. Every application submitted for a specific fellowship will first be reviewed by external reviewers to determine whether the eligibility requirements have been met. Applications that meet the eligibility requirements will subsequently be reviewed by panels comprised of EPA staff members. The panels review and evaluate each application based on the evaluation criteria listed below.

- Relevancy of the classroom experience of the student as it relates to the EPA fellowship (maximum score = 15 points)
- Student's understanding of the proposed EPA fellowship subject matter (maximum score = 10 points)
- Relevancy of work experience of the student (whether volunteer activities, internships or paid jobs) as it relates to the EPA fellowship (maximum score = 10 points)
- Relevancy of the student's academic studies to the EPA fellowship (maximum score = 5 points)
- Leadership skills, written communication skills and demonstrated success at working well in an office, laboratory or field environment, as appropriate to the project (maximum score = 5 points)
- Potential for success, as reflected by academic records, letters of reference and other relevant information (maximum score = 5 points)

Applications that are scored highly based on the evaluation criteria listed above by the panels of reviewers are then sent to the NNEMS staff and the EPA project officers for consideration.

### Selection and Notification of Award Status

Once the EPA has made a decision about whom to award a fellowship, the EPA project officer will contact the student to offer the fellowship and discuss specific details about the fellowship. Discussions between the project officer and applicant are intended to produce a clear, mutual understanding of the details of the project and the results the student wishes to achieve from the project. The student should expect to discuss with the EPA project officer general information about the project, including:

- Specific location where the project will be conducted;
- Amount of the stipend to be paid to the student;
- Approximate duration of the project;



- Primary point of contact for the student;
- Names of the EPA staff with whom the student will be working;
- Access to telephone, email and the Internet; and
- General sources of information that will be made available to the students (for example, previous research studies, resources, etc.) and any non-monetary assistance that the EPA may be able to provide to the student during the fellowship.

During the notification call, the EPA project officer will also review with the student the procedures he or she must follow to initiate and complete the fellowship as described in detail under *Procedures to Initiate and Complete a NNEMS Fellowship* on pages 10 and 11.

A fingerprint check or a fingerprint check and a background investigation for security purposes may be required of fellowship recipients, and personal information about the recipient will be required to complete these investigations. The EPA reserves the right to terminate the fellowship agreement with a recipient if his or her background investigation reveals adverse information.

## Student Acceptance of Award

A student selected for a NNEMS fellowship must complete additional documentation required by the federal government to apply for an official grant with the EPA. The steps required to process a fellowship and the grant award are lengthy (see *Procedures to Initiate and Complete a Fellowship* on pages 10 and 11 for more details).

If a student is offered and accepts a fellowship, the NNEMS staff will send to the student a Fellowship Application Packet, instructions for completing the forms in the packet and a copy of the Guidebook for NNEMS 2012 Fellows. **The forms must be completed and returned to the NNEMS staff within 2 weeks of receipt in order to begin the processing of the paperwork required of all fellowships.**

## Notification of Non-Selection

Students who are not selected for a 2012 fellowship will be notified initially by email within 15 calendar days after a decision of non-selection is made. An official notification letter will be sent to the student's address provided on the NNEMS Application Form.



**Students selected to receive a NNEMS fellowship must complete and return the forms in the Fellowship Application Packet within 2 weeks of receipt of the forms from the EPA.**

# Procedures to Initiate and Complete a Fellowship

This section describes the procedures that students who are selected to receive NNEMS fellowships must follow to initiate and complete fellowships.

## How to Initiate a Fellowship

The steps required to process a fellowship and the grant award are lengthy. It is imperative that students follow the instructions provided by the EPA and submit all materials on time. A student may not begin a fellowship until all of the required documents are submitted.

### Step 1: Complete and Submit the Fellowship Application Packet Forms

A student selected for a NNEMS fellowship will receive a grant award in the form of a stipend. Because a NNEMS fellowship is a grant issued by a federal agency, the student must complete additional documentation required by the federal government. In addition to completing a NNEMS application, a student selected for a NNEMS fellowship must submit the forms described below to receive a fellowship grant.

An applicant selected to receive a fellowship will be notified by the EPA project officer. NNEMS staff will then mail the student an official Fellowship Application Packet that includes a Fellowship Application (EPA Form 5770-2), a Fellowship Facilities and Commitment Statement (5770-3), and a Fellowship Stipend Payment Enrollment Form.

The Fellowship Application Packet forms must be completed, signed and returned to the NNEMS staff within 2 weeks of receipt. A delay in the submittal of the paperwork will result in a delay in the fellowship start date.

### Step 2: Processing of the Fellowship Application

Upon receipt of the completed Fellowship Application Packet forms, NNEMS staff will work with the EPA project officer to submit the necessary paperwork to the EPA's Grants and Interagency Agreement Management Division (GIAMD) for approval and award of the grant. All the information that the student provided will be verified by GIAMD and entered into its computer files. The student's grant will be assigned a number and a grants specialist will process the student's forms and mail the acceptance documents to the student's permanent mailing address (as indicated on the Fellowship Application) for the student's signature. The processing of the grant may take up to 6 weeks to complete. The official notification of an award will be made by GIAMD. A Congressional notification period of 5 days must be observed before the acceptance documents are mailed to the student.

### Step 3: Complete and Submit the Acceptance Documents

Approximately 6 weeks after the Fellowship Application Packet forms have been submitted to the EPA, the student will receive his or her grant award documents, which include a Fellowship Agreement (EPA Form 5770-8), Fellowship Activation Notice (EPA Form 5770-7) and the EPA Completion of Studies Notice (EPA Form 5770-9). **The student may not start work with the EPA until he or she has signed and returned the Fellowship Agreement. In addition, the student must have his or her EPA project officer sign the Fellowship Activation Notice on the student's first day with the EPA and return it to GIAMD.**

- **Fellowship Agreement (EPA Form 5770-8).** The Fellowship Agreement is the written agreement (including any amendments) between the EPA and the student awarded a fellowship. The amount of the fellowship award and the terms and conditions of the fellowship are provided in the Fellowship Agreement. The student must sign the form and return it to GIAMD at the address provided on the form within 3 weeks of receipt or within a timeframe approved by GIAMD. If the student does not return the Fellowship Agreement or request an extension of the acceptance time limit within 3 weeks, the proposed start date of his or her fellowship will be delayed. The EPA will not be responsible for any costs incurred under a voided agreement.

#### DEADLINES

Within 2 weeks  
of receipt

Up to 6 weeks  
following receipt  
of the Fellowship  
Application Packet  
by the EPA

Within 3 weeks  
of receipt

continued on next page

### Step 3 Continued...

- **Fellowship Activation Notice (EPA Form 5770-7).** The Fellowship Activation Notice should be signed by the EPA project officer on the student's first day of work. The EPA project officer then should return the signed form to GIAMD. Once the signed Fellowship Activation Notice is received, GIAMD is responsible for sending the notice to the EPA's Financial Management Center in Las Vegas, Nevada, to authorize payments to the student. If the Fellowship Activation Notice is not submitted to GIAMD within 90 days of the start of the fellowship, the EPA will initiate action to terminate the fellowship agreement.
- **EPA Completion of Studies Notice (EPA Form 5770-9).** The EPA Completion of Studies Notice should be completed by the student, signed by the EPA project officer and submitted by the student as indicated in "How to Complete a Fellowship."

### Step 4: Begin the Fellowship

The student should begin the fellowship on the date and at the location arranged with the EPA project officer and specified in the Fellowship Agreement.

#### DEADLINES

First day of fellowship

Last day of fellowship

Varies, as agreed by the EPA project officer and student

### How to Complete a Fellowship

At the completion of a NNEMS fellowship, all NNEMS fellows are required to:

#### Step 1: Submit a Final Report of the Project

A copy of the final report must be provided to the EPA project officer on the last day of the fellowship. Unless directed otherwise by the EPA project officer, the report should summarize the specific project undertaken by the student and the project results.

#### Step 2: Submit the EPA Completion of Studies Notice (EPA Form 5770-9)

The EPA Completion of Studies Notice (EPA Form 5770-9) must be completed by the student, signed by the EPA project officer and submitted by the student to the EPA's Financial Management Center in Las Vegas, Nevada, on the last day of the fellowship. The final payment for the balance of the fellowship award, if any, is typically mailed to the student within 2 weeks after the fellowship has officially ended.

#### Step 3: Retain All Records

The student is required to retain all records related to the fellowship for 3 years following the completion date identified on the EPA Completion of Studies Notice.

Please note that the EPA, the Inspector General, the Comptroller General of the United States and any of their duly authorized representatives have the right of timely and unrestricted access to a student's documents, papers or other records related to a fellowship in order to make audits, examinations, excerpts, transcripts and copies of such documents. The rights of access in this paragraph are not limited to the required retention period but shall last as long as records are retained.

#### DEADLINES

Last day of fellowship

Last day of fellowship

3 years after completion of fellowship



# Guidelines for NNEMS Fellows

Provided below are the general rules and regulations that guide NNEMS fellows.

## Payment of the Grant

Students selected for a fellowship receive a grant award in the form of a stipend. The grant is paid in monthly installments based on the duration of the project. The EPA will not make payments under a fellowship agreement until the award official receives the signed Fellowship Activation Notice. Unless the fellowship provides another payment process, the student may request the EPA to make the stipend payment as follows:

- A portion paid directly to the educational institution for tuition costs, or
- Payment to the student on a monthly basis or another basis approved by the EPA project officer and as stated in the Fellowship Agreement. Students are required to receive payment electronically and must complete the Fellowship Stipend Payment Enrollment Form that is included in the Guidebook for NNEMS 2012 Fellows, which is provided to students after they are awarded a fellowship. Once the form is completed and returned to the EPA's Financial Management Center, the stipend payment will be made by direct deposit.

The first stipend payment is typically received approximately 4 to 6 weeks after the fellowship begins.



**Tuition costs sent directly to the educational institution attended by the student are tax exempt. Students who prefer that their tuition costs be sent directly to their educational institution must make this request of their EPA project officer when initially accepting their fellowship offer.**

## Taxes

The EPA does not withhold any taxes nor generate an Internal Revenue Service (IRS) Form W-2, Wage and Tax Statement; nonetheless, the stipend amount is taxable. Students must maintain a record of their stipend amount and file their own taxes. According to the rules of the IRS, portions of the stipend may be tax exempt. Tax-exempt funds for NNEMS fellowships include the portion of money sent directly to a student's school for tuition. These funds do not have to be reported to the IRS. The IRS recommends that students pay quarterly taxes on large stipend amounts in order to minimize the possibility of being assessed a penalty at the end of the year. Please see *Appendix C: IRS Publication 970: Tax Benefits for Education*, for detailed information and instructions for filing taxes on a fellowship award. Please contact your local IRS office if you have further questions.



### Important Tax Information:

- The EPA does not withhold any taxes nor generate an IRS Form W-2
- The stipend amount is taxable, although the portion of the stipend used for tuition costs is tax exempt (see above, Payment of the Grant)
- Students are required to keep their own income records and file their own taxes
- Students will not receive an IRS Form W-2 from the EPA.

## Benefits

A student selected for a NNEMS fellowship is an EPA grant recipient, not a federal employee. As such, the student will not accrue leave, will not be entitled to health or life insurance benefits, nor have taxes withheld from his or her stipend.

## Travel and Housing

The EPA is not responsible for a student's travel expenses to and from the project site nor for the student's housing costs. If selected for a NNEMS fellowship that is located away from home or school, students are responsible for making their own arrangements for travel and housing.

If a student is required to participate in official travel during the performance of a project, the EPA will add to the stipend additional funds to cover associated travel costs. Because students will not be reimbursed for any unapproved travel costs, it is very important that students do not incur any travel expenses until the stipend has been increased to cover such costs.

NNEMS fellows may not drive a government-owned (EPA or General Services Administration [GSA]) vehicle; however, they may ride as passengers in government-owned vehicles.

If a student must travel for research purposes, he or she does so at his or her own risk; the EPA is not responsible for any accidents that may occur. Please see the following section about liabilities for more information.

## Liabilities

The issue of liability for injuries that result from the acts of NNEMS fellows arises with respect to two categories of injured persons: the NNEMS fellow and all others.

- In the case of a NNEMS fellow who is injured while performing his or her fellowship, it is important to recognize that the fellow is not a federal employee. Rather, as the recipient of a stipend that is comprised of grant monies, the student is a grantee. As such, the student is not entitled to compensation for on-the-job injuries under the Federal Employees Compensation Act (FECA), Section 5 of the United States Code (U.S.C.) §§ 9101 et seq. The government is not responsible for any accidents that may occur on site or during the course of required travel for a fellowship.
- In the event that a student's injury is the result of negligence on the part of an EPA employee, the student may be eligible for compensation under the Federal Tort Claims Act (FTCA), 28 U.S.C. §§ 1346, 2671-2680.<sup>4</sup>
- In instances in which a student injures others, in the execution of his or her research duties, the government generally is not liable under the FTCA for any injury that results from the student's negligent acts because the student is not a federal employee.

In summary, a student may be vulnerable to significant personal liability for any damages or injuries that may result from his or her acts. Consequently, the EPA recommends that students be fully informed of their exposure to personal liability and suggests that students may wish to secure personal injury insurance. EPA project officers or managers should not place the students in hazardous situations or in situations in which a considerable potential for accident or injury exists.

## Student Program Evaluation

In an effort to continuously improve the NNEMS program each year, the EPA may contact NNEMS fellows by telephone or email to determine their overall satisfaction with the NNEMS program and to request suggestions for improving the program in future years. Participation in the evaluation will take no more than a few minutes and is voluntary.

## Confidential Business Information

NNEMS fellows are not permitted access to or use of Confidential Business Information (typically referred to as "CBI") or enforcement-sensitive information.

## Resolution of Disputes

Assistance agreement competition-related disputes will be resolved in accordance with the dispute resolution procedures published in 70 FR (Federal Register) 3629, 3630, (January 26, 2005) located on the web at [www.epa.gov/ogd/competition/resolution.htm](http://www.epa.gov/ogd/competition/resolution.htm).

<sup>4</sup> The FTCA provides a cause of action against the United States to individuals who incur damage to property or suffer personal injury as a result of a negligent or wrongful act or omission of a government employee acting within the scope of his or her employment.

## Frequently Asked Questions

Listed below are questions asked by applicants to the NNEMS program in previous years, as well as by students who received fellowship awards.

- Q** I am interested in applying for a NNEMS fellowship, but I do not have a NNEMS Program Coordinator at my school. May I apply?
- A** Yes, any eligible student may apply for a NNEMS fellowship, regardless of whether or not there is a NNEMS Program Coordinator at his or her university.
- Q** I am graduating in May 2012 and will be taking a year off before attending graduate school in the fall of 2013. Am I eligible to apply for a fellowship scheduled to take place during the summer of 2012?
- A** No, only students who are currently enrolled in undergraduate or graduate school at the time of fellowship award are eligible.
- Q** Is the NNEMS program open to international students who attend U.S. universities or colleges?
- A** No. The NNEMS program is only available for students who are citizens of the United States, its territories or possessions, or who are lawfully admitted to the United States for permanent residency. The U.S. Citizenship and Immigration Services defines lawful permanent residency as any person not a citizen of the United States who is residing in the United States under legally recognized and lawfully recorded permanent residence as an immigrant, also known as "Permanent Resident Alien," "Resident Alien Permit Holder" and "Green Card Holder." A lawful permanent resident must provide his or her Green Card number on his or her application.
- Q** I am an American citizen currently enrolled as a full-time graduate student at Cambridge University. Are American students pursuing graduate-level studies in the area of environmental management/environmental protection at Cambridge University eligible to apply for the NNEMS Fellowship Program?
- A** Yes. You are eligible to apply for a NNEMS fellowship because you are a U.S. citizen, Cambridge University is recognized by the U.S. Department of Education as a fully accredited academic institution, and you are enrolled in an academic program directly related to pollution control or environmental protection.
- Q** Are high school students eligible for the NNEMS Fellowship Program?
- A** No, only undergraduate and graduate students are eligible for NNEMS fellowships.
- Q** Do the project descriptions offered in the NNEMS Catalog remain the same each year, or are new projects offered each year?
- A** The number and types of projects change each year depending on the EPA's departmental and program issues and priorities, as well as funding available for the fellowships.
- Q** Do applications have to be received or postmarked by the date of the deadline?
- A** The application packets must be postmarked on or before the date of the deadline. The deadline for the 2012 program is January 30, 2012.
- Q** May my academic advisor mail the NNEMS Reference Form required for the NNEMS application under separate cover, or must the reference be included in the original application packet?
- A** We prefer that the Reference Form be included in the application package, but your advisor may send the form directly to the NNEMS Fellowship Program. However, please be sure to note on your application packet that the form will be coming under separate cover. In addition, the form must be postmarked by the deadline and be clearly marked to correspond with your application.
- Q** If I request an original, sealed transcript, may I break the seal to make copies of the transcript as required?
- A** Yes. If you receive one original transcript from your university's records office, you may open the sealed envelope to make photocopies. Please include the envelope that contained the original transcript in the application package and note that it was opened to make the photocopies.

- Q** I am interested in applying for a NNEMS fellowship and would like to apply for multiple projects. Do I need to submit original transcripts for each of the projects?
- A** You must submit an original transcript and two copies of your transcripts for at least one of the projects for which you are applying. You are permitted to include copies of your transcript for other projects for which you are applying. See the section, *How to Apply*, on page 5 for detailed instructions on applying for a fellowship.
- Q** If I apply for more than one project, should each application be sent separately?
- A** No. All applications may be sent within the same package.
- Q** I have been selected for one of the projects for which I submitted an application, but have decided to decline the offer. Will I be penalized for the other project or projects for which I applied?
- A** No, you will not be penalized for declining a fellowship offer. The criteria for evaluating and selecting NNEMS fellows are based on determining who is the most qualified candidate who will meet the needs of the specific project.
- Q** How will I know if my NNEMS application(s) has been received?
- A** Students whose applications are received with a postmark on or before January 30, 2012 will receive an email at the email address identified in the "Current Email" and/or "Permanent Email" fields found on page 1 of the NNEMS Application Form. If you do not receive a confirmation of application receipt email within 30 calendar days of the application deadline, please visit the EPA's NNEMS website at [www.epa.gov/education/students.html](http://www.epa.gov/education/students.html) and click on the link to send an email to the NNEMS Fellowship Program.
- Q** When do we find out whether we were selected for the NNEMS Program?
- A** Most candidates are notified of their acceptance in April. Students who are not awarded fellowships are initially notified by email in late April or early May, or within 15 calendar days after a decision of non-selection. An official notification letter will be sent to the address indicated on the NNEMS Application Form where the student would like materials to be sent.
- Q** I just started work on my project. When can I expect my first stipend check?
- A** You should get your first check within 4 to 6 weeks after returning the signed Fellowship Agreement and the signed Fellowship Activation Notice to GIAMD (see *Procedures to Initiate and Complete a Fellowship* on page 10). The Fellowship Agreement should be signed and returned immediately upon receipt, and the Fellowship Activation Notice should be signed by your EPA project officer and submitted to GIAMD on your first day of work.
- Q** I have been receiving my stipend checks monthly, but I've noticed that no taxes are being deducted. Are fellowships taxable?
- A** Yes. While the EPA does not withhold any taxes, nor generate an IRS Form W-2, Wage and Tax Statement, the stipend amount is taxable. Students must maintain a record of their stipend amount and file their own taxes. According to the latest IRS rules, portions of the stipend may be tax exempt. Tax-exempt funds include, for example, the portion of money sent directly to a student's school for tuition and supplies. These funds do not have to be reported to the IRS. The IRS recommends that students pay quarterly taxes on large stipend amounts to minimize the potential for a penalty at the end of the year. *Appendix C - IRS Publication 970: Tax Benefits for Education* provides information about filing taxes on the fellowship award. Please contact the IRS for any further information related to the filing of taxes on a fellowship grant.
- Q** My project report has been finalized, and I've given a copy to my project officer and the NNEMS staff. May I copyright the report or have it published in a periodical?
- A** Yes. Because NNEMS students are grantees, you have copyright authority without having to seek the approval of the federal government as discussed in 40 CFR, Subchapter B - Grants and Other Federal Assistance, Part 30, Subpart C - Post Award Requirements, 30.36. Please consult the CFR for limitations and exceptions to this authority.
- Q** What if a project description is described minimally? How can I develop my Proposed Research Plan in response?
- A** If you would like additional information on or clarification of a specific project, please complete and submit the "Project-Specific Questions Form" that is available online at [www.epa.gov/education/NNEMS/2012projects.html](http://www.epa.gov/education/NNEMS/2012projects.html). A response to your question will be provided by email as soon as possible.

# Catalog of 2012 Fellowships

Described on the following pages are the NNEMS fellowships being offered in 2012. As discussed in detail in the *Overview of the NNEMS Program* section, the fellowships are organized under four categories:

- **Environmental Policy, Regulation and Law**

Fellowships offered in this category provide students an opportunity to review and evaluate existing policies and regulations, as well as conduct research related to the development of new policies. The projects may include a component that focuses on environmental compliance.

- **Environmental Management and Administration**

The topics of fellowships in this category focus on environmental management goals.

- **Environmental Science**

Fellowships in this category typically include direct participation in field studies and laboratory research. Environmental policy and regulation review requiring technical expertise is included in the Environmental Policy, Regulation and Law category described above.

- **Public Relations and Communications**

These types of fellowships include the review and analysis of public response to the EPA policies and regulations, as well as general public opinion of environmental issues. The projects may include the development of communication tools; for example, pamphlets and informational materials.

The fellowships are organized by category and listed in numerical order by project number. Each entry presents a description of the fellowship and identifies the EPA office that is sponsoring the fellowship, the location at which the fellowship will be conducted, the timeframe for the project, the desired educational level of the student and the name of the EPA project officer.



Please note that in 2012, the NNEMS program will offer approximately 10–15 fellowships, a majority of which are sponsored in Research Triangle Park, North Carolina.



# 2012 Fellowships

## Environmental Policy, Regulation and Law

### PROJECT NUMBER: 2012-101

#### Project Title:

Linkages between Air Quality and Climate

#### Sponsoring Office:

Office of Air and Radiation; Office of Air Quality Planning and Standards; Health and Environmental Impacts Division; Climate, International and Multimedia Group

#### Office Mission:

The Office of Air Quality Planning and Standards compiles and reviews air pollution data, develops regulations to limit and reduce air pollution, assists states and local agencies with monitoring and controlling air pollution, makes information about air pollution available to the public, and reports to Congress on the status of air pollution and the progress made in reducing pollution.

#### Project Overview:

As states, local agencies and tribes move forward to develop and implement programs to improve air quality and address climate change, it is important to have a good understanding of the interactions among global climate, air quality and regional climate. Tropospheric ozone, black carbon and sulfates are strongly linked to both climate and air quality. Knowledge of the linkages between climate and air quality will help develop effective programs to further improve air quality, while also addressing impacts of these programs on climate change.

The fellow selected for this project will design and implement a research project involving linkages between climate and air quality and related policy issues. Relevant policy questions that may be of interest include: (1) how might air quality management strategies be adapted in a changing climate?; (2) what effect will air quality programs in the United States have on the climate?; (3) what opportunities are there to devise and implement strategies that improve both climate and public health?; (4) how can capacity for integrated climate and air quality assessments be improved (such as air quality, economic, health and ecological), especially in light of differences in temporal and geographic scales between greenhouse gases and traditional air pollution?; (5) what are the health and climate impacts of fine particle emissions from residential cook stoves, brick kilns and other emissions sources in developing countries?; and (6) what are the impacts on Arctic warming from black carbon and ozone precursor emissions in the United States?

The fellow will meet with experts across the EPA (including the Office of Air and Radiation and the Office of Research and Development), government, and in academia to gather relevant peer-reviewed data and literature and to conduct policy-relevant analysis.

#### Project Goals:

The fellow can expect to increase his or her knowledge of air pollution issues in the United States, linkages between climate and air quality (for example, science, economics and policy), and potential policy implications. Research completed under this fellowship could be applied to a Master's thesis or Ph.D. dissertation. When the project is complete, the fellow will have accomplished one or more of the following: (1) improved skills in design and implementation of a research project, (2) identified climate - air quality linkage effects, (3) identified potential activities to provide ecosystem benefits, and (4) identified new approaches to estimate climate co-benefits.

#### Final Product of the Project:

The fellow will write and present a paper or presentation that describes the research conducted about the linkages between climate and air quality.

#### Desired Level of Education:

Graduate Student to Ph.D. Student

#### Project Location:

Research Triangle Park,  
North Carolina

#### Project Period:

5/14/2012 to 8/24/2012

#### Project Officer:

Dennis Shipman

### PROJECT NUMBER: 2012-102

#### Project Title:

Outreach for Air Quality Designations

#### Sponsoring Office:

Office of Air and Radiation, Office of Air Quality Planning and Standards, Air Quality Policy Division, Geographic Strategies Group

#### Office Mission:

The Office of Air Quality Planning and Standards (OAQPS) compiles and reviews air pollution data, develops regulations to limit and reduce air pollution, assists states and local agencies with monitoring and controlling air pollution, makes information about air pollution available to the public, and reports to Congress on the status of air pollution and the progress made in reducing pollution.

#### Project Overview:

The national ambient air quality standards (NAAQS) for criteria pollutants are reviewed every 5 years. If a NAAQS is revised, areas of the United States in violation of the revised NAAQS must be identified through a process called air quality designations. The NAAQS for several pollutants — including ozone, lead, nitrogen dioxide and sulfur dioxide — have recently been revised. Under this project, the fellow will conduct research on U.S. air pollutants and pollution issues, as well as the activities undertaken by EPA and state and local air pollution agencies to manage air quality to achieve national standards. The fellow also will work with OAQPS staff as they plan and produce outreach and communications materials on air quality designations for state and local air pollution.

#### Project Goals:

The fellow will increase his or her knowledge of air pollution issues and activities undertaken by the EPA and state and local air pollution agencies to manage air quality to achieve national standards. When the project is complete, the fellow will have accomplished one or more of the following: (1) analyzed air pollutant issues in local areas, (2) researched designation activities to reduce air pollution, and (3) developed skills needed to advance program guidance and implementation for local application.

#### Final Product of the Project:

The fellow will be expected to develop a final report and make presentations that summarize activities completed to EPA staff and management, as well as others, as appropriate.

#### Desired Level of Education:

Freshman to Senior

#### Project Location:

Research Triangle Park, North Carolina

#### Preferred Project Period:

5/14/2012 to 8/24/2012

#### Project Officer:

Dennis Shipman

### PROJECT NUMBER: 2012-103

#### Project Title:

Outreach for Tribal Air Quality Program

#### Sponsoring Office:

Office of Air and Radiation, Office of Air Quality Planning and Standards

#### Office Mission:

The primary mission of the EPA's Office of Air Quality Planning and Standards (OAQPS) is to preserve and improve air quality in the United States. As a national EPA headquarters office located in Research Triangle Park, North Carolina, OAQPS compiles and reviews air pollution data; develops regulations to limit and reduce air pollution; assists states and local agencies with monitoring and controlling air pollution; makes information about air pollution available to the public; and reports to Congress on the status of air pollution and the progress made in reducing pollution.

#### Project Overview:

Tribal governments often have difficulty applying national, general guidance to their particular situation. To enhance capacity building on tribal lands, it is necessary to develop more specific documents that illustrate tribal issues and concerns. The fellow selected will conduct research on U.S. air pollutants and pollution issues, as well as the activities undertaken by the EPA and state, tribal, and local air pollution agencies to manage air quality and implement national standards on tribal lands. The fellow also will research program-specific outreach and communications guidance for tribal programs.

#### Project Goals:

The fellow can expect to increase his or her knowledge of criteria and air toxics pollutant control, policy analysis, the community tribal program and the federal regulatory process. When the project is complete, the fellow will have accomplished one or more of the following: (1) analyzed air pollutant issues in local areas, (2) reviewed implementation activities to reduce air pollution, and (3) developed skills needed to advance program guidance and implementation for local application.

#### Final Product of the Project:

The fellow will develop a report of outreach and communication guidance documents that are used in tribal communities.

#### Desired Level of Education:

Junior to Graduate Student

#### Project Location:

Research Triangle Park, North Carolina

#### Preferred Project Period:

5/14/2012 to 8/24/2012

#### Project Officer:

Dennis Shipman





### PROJECT NUMBER: 2012-201

#### Project Title:

Sustainable Materials Management in the Pacific Northwest

#### Sponsoring Office:

EPA Region 10, Office of Air, Waste and Toxics

#### Office Mission:

The mission of the Office of Air, Waste and Toxics is to be a steward of the environment to protect air quality, control toxics and manage waste.

#### Project Overview:

The fellow will support the Waste Materials Management and Stewardship Team in its mission to support more sustainable use of materials and waste management in the Pacific Northwest and Alaska. The fellow will work with members of the team to integrate materials management into climate change discussion, policies and programs. For example, the fellow will work with the team as it develops resources and tools to promote sustainability, recycling and green building practices. The fellow will develop case studies, research best practices and participate in a web-based educational series on effective sustainability, recycling and green building practices and programs. In addition, the fellow will meet with state, local and tribal partners to research how these improved environmental practices have been integrated into their businesses. Finally, the fellow will support development of product stewardship initiatives and implementation of climate actions into federal facilities. To be successful at this project, the fellow should have strong oral and written communication skills, an understanding of sustainability, and a passion for environmental work. Specific assignments will include interviewing partners to learn about green practices and conducting research, as well as working closely with a high-energy and collaborative team.

The EPA will select up to two fellows for this project. The project dates can be negotiated, but the project length must be no less than 6 months at 20 to 30 hours per week, depending on the project length.

#### Project Goals:

The fellow will gain understanding in a new and exciting area of work — sustainable materials management. The fellow will understand the impact of materials management on our climate footprint and will be able to translate that understanding into effective communications.

#### Final Product of the Project:

The final product will include a written and oral component and will demonstrate the fellow's ability to conduct effective research and find superior environmental outcomes. The exact nature of the work products will depend on which projects the fellow focuses and may include intermediate reports on any of the materials management topics listed above.

#### Desired Level of Education:

Graduate Student to Ph.D. Student

#### Project Location:

Seattle, Washington

#### Preferred Project Period:

6/1/2012 to 5/31/2013

#### Project Officer:

Lisa McArthur



### PROJECT NUMBER: 2012-202

#### Project Title:

Risk Management Program Database Analysis

#### Sponsoring Office:

EPA Region 10, Office of Environmental Cleanup, Emergency Management Program

#### Office Mission:

The mission of the Emergency Management Program is to prepare, prevent and respond to chemical releases toxic or flammable in protecting human health and the environment from significant risks.

#### Project Overview:

The fellow will have an opportunity to participate in many aspects of the Clean Air Act Risk Management Program. The Risk Management Program was created to prevent and prepare for releases of toxic and flammable substances that have the potential for catastrophic consequences. The Risk Management Program requires facilities that produce, handle, process, distribute or store greater than a threshold quantity of any listed toxic or flammable, extremely hazardous substance to develop a Risk Management Program, prepare a Risk Management Plan (RMP) and submit the RMP to the EPA. The Risk Management Program monitors and inspects the compliance of facilities with an RMP.

During this project, the fellow will conduct analysis using the following two data systems: (1) the Risk Management Program database, which collects facility monitoring information, and (2) the national database. The fellow will interact with representatives (or staff) of other federal, state and local government agencies and also will learn about the broader mission of the Emergency Management Program.

#### Project Goals:

The fellow will gain knowledge of the EPA's Risk Management Program, the Emergency Planning and Community Right-to-Know Act (EPCRA), and emergency response programs concerning the prevention of chemical releases that could affect the environment and members of the public. The fellow will enhance his or her writing, communication, and presentation skills and participate in briefings, meetings and field work.

#### Final Product of the Project:

The fellow will develop a report and present his or her findings on the project.

#### Desired Level of Education:

Freshman to Senior

#### Project Location:

Seattle, Washington

#### Preferred Project Period:

6/1/2012 - 8/21/2012

#### Project Officer:

Sally Hanft



**PROJECT NUMBER: 2012-301**

**Project Title:**

Green Infrastructure Site Location Decision Support Tool

**Sponsoring Office:**

Office of Research and Development, National Risk Management Research Laboratory, Ground Water and Ecosystems Restoration Division

**Office Mission:**

The Ground Water and Ecosystems Restoration Division (GWERD) conducts research and provides technical assistance to support the development of strategies and technologies to protect and restore groundwater, surface water and ecosystems affected by man-made and natural events. GWERD applies this basic knowledge to develop and evaluate innovative methods to: (1) restore contaminated groundwater, (2) prevent pollution of pristine groundwater, and (3) restore watershed ecosystems.

**Project Overview:**

Green Infrastructure (GI) and Low Impact Development (LID) approaches are increasingly being used as Best Management Practices (BMP) in attempts to regulate hydrology, manage water quantity and quality, and offset ecological impacts of urbanization and land use change. GI and LID include methods such as swales, detention ponds, green roofs, riparian buffers, rain gardens and constructed wetlands. Water quality managers require science-based assistance for making management decisions because there may be considerable variability in benefits associated with these approaches.

Under this project, the fellow will research and prepare a decision support tool for urban watershed planning that will prioritize the selection and location of effective GI and LID approaches intended to improve water quality and quantity in urban watersheds. The ultimate objective of this decision support tool is to provide a systematic mechanism that will improve the cost effectiveness of siting and implementing GI- and LID-based management approaches.

The fellow will take a hierarchical approach to the project, including: (1) identifying and synthesizing land use data and city engineering plans for a city of interest that will form a case study for proof of principle; (2) creating maps and geographic information system (GIS) layers to display city infrastructure, roads, residential and commercial construction, streams, green space, and other features, and developing criteria for selection of GI and LID based on hydrology and nutrient removal effectiveness as reported in the literature; (4) developing decision mechanisms such as if-then statements, decision trees, and neural networks or algorithms designed to systematically and automatically select sites with best potential for GI or LID implementation; and (5) testing the decision tool and assessing sensitivity by ground-truthing selected sites. The fellow should expect an iterative approach for developing the decision support tool and will work with EPA staff throughout the development process.

**Project Goals:**

The fellow will conduct cutting-edge research into the land use science and ecology of urban streams and the effects of ecosystem restoration by applying GI or LID methods. The fellow will be mentored by EPA scientists and academic researchers in an apprenticeship context. The primary goals of the project are for the fellow to explore the feasibility of creating sustainable, urban ecosystems and to develop an understanding of the growing field of urban ecology, planning and design. The fellow will receive training by leading researchers that will augment his or her current graduate program.

**Final Product of the Project:**

The fellow is expected to develop a functional beta version of a decision support tool consisting of a spatially explicit, interactive GIS platform that allows users to identify best locations for implementing and installing GI and LID methods for water quality management in watersheds. Regular progress reports and presentations are expected.

**Desired Level of Education:**

Graduate to Ph.D. Student

**Project Location:**

Ada, Oklahoma

**Preferred Project Period:**

9/1/2012 – 5/1/2014

**Project Officer:**

Paul Mayer

### PROJECT NUMBER: 2012-302

#### Project Title:

Alternative Fuels Production and Air Quality

#### Sponsoring Sponsoring Office:

Office of Air and Radiation, Office of Air Quality Planning and Standards, Sectors Policies and Programs Division

#### Office Mission:

The primary mission of EPA's Office of Air Quality Planning and Standards (OAQPS) is to preserve and improve air quality in the United States. As a national EPA headquarters office located in Research Triangle Park, North Carolina, OAQPS compiles and reviews air pollution data and develops regulations to limit and reduce air pollution. The Fuels and Incineration Group is responsible for developing and implementing regulatory and non-regulatory actions for production of traditional fuels such as coal, oil and natural gas, and alternative fuels such as biofuels and biogas.

#### Project Overview:

The President's *Blueprint for a Secure Energy Future* calls for reducing oil imports by one third by 2025. One pathway to meeting this ambitious goal is to increase the production of biofuels, including both ethanol and advanced biofuels. The selected fellow will investigate the air quality impacts associated with the production of various cellulosic (non-corn kernel) biofuels. The fellow also will research the production process (thermochemical, biochemical and transesterification) for each biofuel type, including key process steps (gasification, fermentation and distillation), process equipment, and intermediate products and air pollutants emitted.

#### Project Goals:

The fellow can expect to increase his or her knowledge of criteria and air toxic air pollution and control, renewable energy goals and options, and the benefits and challenges associated with biofuels production. When the project is complete, the fellow will have accomplished one or more of the following: (1) identified key biofuels and their feedstocks, (2) analyzed the production processes and potential air pollutants emitted, (3) analyzed potential end uses of the biofuels, and (4) reviewed controls and mitigation actions to reduce air quality impacts.

#### Final Product of the Project:

The fellow will develop a report compiling information on key biofuels and feedstocks, biofuel production processes, and associated air pollutants and controls. The fellow also will develop a summary PowerPoint presentation.

#### Desired Level of Education:

Junior to Graduate Student

#### Project Location:

Research Triangle Park, North Carolina

#### Preferred Project Period:

5/14/2012 to 8/24/2012

#### Project Officer:

Dennis Shipman

**PROJECT NUMBER: 2012-303**

**Project Title:**

Evaluation of 2010 Ambient Air Monitoring Network Assessments

**Sponsoring Office:**

Office of Air and Radiation, Office of Air Quality Planning and Standards

**Office Mission:**

The Office of Air Quality Planning and Standards develops and enforces national ambient air quality standards through ambient and source monitoring and issuing emission control regulations and associated policies.

**Project Overview:**

Under this project, the fellow will research the 2010 ambient monitoring network assessments that were conducted by state and local monitoring agencies in response to revised monitoring regulations. These assessments are expected to provide a roadmap of changes that are anticipated nationally over the next 5 years in air monitoring networks in response to changes in pollution, population, technology and resources.

Specific elements of this project are likely to include:

- Reviewing monitoring regulations that alter how states design and modify their air monitoring networks
- Reviewing the guidance document and the set of analytical tools that were prepared by EPA to assist monitoring agencies with the process of evaluating their networks
- Obtaining and researching (electronically or through hard-copy form) the complete set of network reports that were completed in response to this requirement and the monitoring website (AMTIC)
- Researching the state reports and preparing a summary document that includes an analysis of relevant national themes, such as:
  - Areas of investment and divestment in monitoring resources
  - Use of changing technology
  - Discussions of key issues, such as environmental justice, impact of monitoring changes on sensitive populations (such as asthmatic children) and other key demographic trends

It also is expected that the fellow will directly work with EPA staff in all of the regional offices, as well as monitor contacts at the state and local agencies, in a collaborative way to obtain information and discuss assessments and the process that was used.

**Project Goals:**

The fellow will gain experience and understanding of ambient monitoring network design requirements and strategies, use of statistical and graphical analysis tools, and gain technical insights through discussions with both EPA regional office and state and local monitoring personnel. Oral and written communication skills also will be enhanced through technical discussions, preparation of a final report, and presentation to mentors and NNEMS colleagues at the completion of the project.

**Final Product of the Project:**

The fellow will develop a report that summarizes the issues noted above, including detailed summary tables of site/monitor changes that were noted in the assessments. Detailed outputs from this work could include maps, tables and graphs describing work that is being done. The fellow also will conduct a presentation to mentors and NNEMS colleagues at the completion of the project.

**Desired Level of Education:**

Junior to Graduate Student

**Project Location:**

Research Triangle Park, North Carolina

**Preferred Project Period:**

5/14/2012 to 8/24/2012

**Project Officer:**

Dennis Shipman

### PROJECT NUMBER: 2012-401

#### Project Title:

Community Involvement and Program Initiatives

#### Sponsoring Office:

Office of Solid Waste and Emergency Response, Office of Superfund Remediation and Technology Innovation, Community Involvement and Program Initiatives Branch

#### Office Mission:

The mission of the Superfund program is to reduce the risk to people and the environment by cleaning up the nation's worst hazardous waste problems. The mission of the Superfund Community Involvement Program is to advocate and strengthen early and meaningful community participation during Superfund cleanups.

#### Project Overview:

The Community Involvement Program seeks to build capacity in communities so that citizens may effectively participate in the Superfund process. Building capacity in communities may focus on technical assistance or on providing communities the opportunity to form advisory groups to discuss site activities and resolve issues.

In addition, the Community Involvement and Program Initiatives Branch works to establish dialogue with members of the public on critical issues facing communities near Superfund sites. During this project, the fellow will become familiar with the Superfund process and learn how public participation processes are implemented during cleanups.

The specific project will depend on the emerging issues at the time of application and selection. Students applying for this fellowship must have good writing skills and be able to perform basic research, critical analysis and synthesis of information from multiple sources. In addition, the students should have knowledge of community involvement and conflict resolution.

#### Project Goals:

The fellow will learn critical issues facing a government agency as it seeks to involve the public in decision making. In addition, the fellow will learn to analyze emerging issues and topics and work with EPA staff in developing strategies for managing the issues and topics.

#### Final Product of the Project:

The fellow will develop a final report summarizing the results of his or her project.

#### Desired Level of Education:

Graduate Student

#### Project Location:

Arlington, Virginia

#### Preferred Project Period:

6/1/2012 to 8/31/2012

#### Project Officer:

Suzanne Wells



# Appendix A – Application Materials

A complete set of application materials is included in this appendix. Electronic versions of the forms can be downloaded from the EPA's website at [www.epa.gov/education/students.html](http://www.epa.gov/education/students.html). The forms are available in an interactive portable document format (pdf) and can be completed online, then printed and mailed to the EPA NNEMS Staff as described in the *How to Apply* section on page 5.

<b>NNEMS Application .....</b>	<b>A-3</b>
<b>Sample NNEMS Application .....</b>	<b>A-5</b>
<b>Standard Form 424 – Application for Federal Assistance.....</b>	<b>A-7</b>
<b>Sample Standard Form 424 – Application for Federal Assistance .....</b>	<b>A-13</b>
<b>NNEMS Reference Form.....</b>	<b>A-17</b>
<b>NNEMS Disclosure and Waiver Statement.....</b>	<b>A-19</b>



## Helpful Tips:

- Read the section, *How to Apply*, on page 5 for detailed instructions on applying for a NNEMS fellowship
- Confirm that you meet all of the eligibility requirements described on pages 5 and 6
- Include a transcript for each school attended
- Indicate on the application whether the Reference Form(s) will be sent under separate cover
- Type or complete online the application. If handwritten, write as neatly as possible
- Review the application to check for typographical or grammatical errors
- Mail the application so that it is postmarked on or before January 30, 2012.





An interactive PDF version of this form is available online at  
[www.epa.gov/education/NNEMS/2012apply.html](http://www.epa.gov/education/NNEMS/2012apply.html)

## Project Information

Project Number: 2012-\_\_\_\_\_

Project category:

- ☐ Environmental Policy, Regulation and Law  
☐ Environmental Management and Administration  
☐ Environmental Science  
☐ Public Relations and Communications

If you are applying for more than one NNEMS project, please indicate:

\_\_\_\_\_ Total number of NNEMS projects for which you are applying  
 \_\_\_\_\_ Order of preference for this project (1 = most preferred)

**You must complete a separate application for each project for which you are applying.**

## Applicant Information

Name: \_\_\_\_\_

Please check the address to which you would like materials sent.

☐ Current Mailing Address

\_\_\_\_\_  
 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

At Current Address Through \_\_\_\_\_ (month/year)

Current Phone: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Current Email: \_\_\_\_\_

☐ Permanent Mailing Address

\_\_\_\_\_  
 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

At Permanent Address Through \_\_\_\_\_ (month/year)

Permanent Phone: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Permanent Email: \_\_\_\_\_

Current School/University: \_\_\_\_\_

Current Student Level:

- |                                    |                                   |
|------------------------------------|-----------------------------------|
| Undergraduate                      | Advanced                          |
| <input type="checkbox"/> Associate | <input type="checkbox"/> Graduate |
| <input type="checkbox"/> Freshman  | <input type="checkbox"/> Ph.D.    |
| <input type="checkbox"/> Sophomore |                                   |
| <input type="checkbox"/> Junior    |                                   |
| <input type="checkbox"/> Senior    |                                   |

Current Major/Minor: \_\_\_\_\_

Expected Graduation Date: \_\_\_\_\_

Please list any additional universities attended:

		Transcript Enclosed
School/University	Dates Attended	
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

Names of Individual(s) Providing Reference: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Eligibility

A NNEMS fellowship is available to any associate, undergraduate or advanced student who is:

- A citizen of the U.S., its territories or possessions, or lawfully admitted to the U.S. for permanent residency
- Enrolled for academic credit at an accredited educational institution<sup>1</sup>
- Pursuing an educational program directly related to pollution control or environmental protection for the duration of the fellowship

Please note: The following types of students are not eligible for a NNEMS fellowship:

- Federal employees, including those who are on "leave without pay" status
- Undergraduate and graduate students who will graduate before the NNEMS fellowship is completed (Students who complete their undergraduate studies before the end of a fellowship may apply if currently accepted or enrolled to a graduate program.)
- High school students

Additional requirements for associate, undergraduate and advanced students include the following:

### Associate and Undergraduate Students

- 3.0 cumulative grade point average (GPA) based on a scale of 4.0 at the time that the application is due (a GPA of 2.999, for example, is not sufficient)
- Completion of at least four courses related to the field of environmental studies

### Advanced Students

- Currently enrolled in a graduate or Ph.D. program or can provide proof of acceptance and enrollment to a graduate or Ph.D. program at the time of fellowship award. Students who are awaiting notification of acceptance must submit verification of acceptance and enrollment at the time of fellowship award.
- Completion of one semester of graduate or Ph.D. work, or at least four undergraduate courses related to the field of environmental studies

<sup>1</sup> The 2- or 4-year college, university or distance-learning institution must be accredited by a regional or national accrediting organization recognized by the U.S. Department of Education or the Council for Higher Education Accreditation ([www.chea.org](http://www.chea.org)).



## Proposal

**You may attach one additional page as necessary.**

**Proposed Research Plan:** Describe how you would conduct your research on this project.

**Relevant Information:** Describe your academic, professional or relevant experience that you believe qualifies you to conduct this research. For example, identify academic courses or research that enhances your qualifications.

**Academic Goals:** State how you expect this project to support your academic and professional goals.

## Application Package Checklist

	Yes	No		Original	2 Copies	Mailed Separately
Are you a citizen of the U.S., its territories or possessions, or lawfully admitted to the U.S. for permanent residency (a lawful permanent resident must provide his or her green card number on his or her application)?	<input type="checkbox"/>	<input type="checkbox"/>	Students must submit <b>three</b> complete application packages for each project (one original and two copies). Please note that only one official transcript is required, which may be opened and copied, even if a student is applying for multiple projects. Please verify that you have included:			
Are you enrolled at an accredited school?	<input type="checkbox"/>	<input type="checkbox"/>	A completed Application Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you a federal employee? Federal employees, including those who are on "leave without pay" status, are not eligible for a NNEMS Fellowship.	<input type="checkbox"/>	<input type="checkbox"/>	A completed Standard Form 424 (SF 424)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a minimum 3.0 GPA?	<input type="checkbox"/>	<input type="checkbox"/>	A résumé	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Confidential Information</b>	Yes	No	An official college transcript from each school attended	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your application package contain information that you consider to be confidential?	<input type="checkbox"/>	<input type="checkbox"/>	A Reference Form from a professor or advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Be sure to clearly mark confidential information</b>			A completed NNEMS Disclosure and Waiver Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			Verification of acceptance and/or enrollment in a graduate or Ph.D. program if applicant is a graduating senior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Complete application packages must be submitted for each NNEMS project.  
Applications must be postmarked on or before **January 30, 2012**.

Send the completed application package to:  
NNEMS Fellowship Program  
Tetra Tech EM Inc.  
1881 Campus Commons Drive, Suite 200  
Reston, VA 20191

## Project Information

Project Number: 2012- XXX

Project category:

- ☒ Environmental Policy, Regulation and Law  
☐ Environmental Management and Administration  
☐ Environmental Science  
☐ Public Relations and Communications

If you are applying for more than one NNEMS project, please indicate:

- 3 Total number of NNEMS projects for which you are applying  
 1 Order of preference for this project (1 = most preferred)

**You must complete a separate application for each project for which you are applying.**

## Applicant Information

Name: John Doe

Please check the address to which you would like materials sent.

☒ Current Mailing Address

123 Hill Street

Anytown VA 22205

City State Zip

At Current Address Through May 2012 (month/year)

Current Phone: ( 123 ) 456 - 7891

Current Email: johndoe@email.com

☐ Permanent Mailing Address

City State Zip

At Permanent Address Through (month/year)

Permanent Phone: ( ) -

Permanent Email:

Current School/University: State University

Current Student Level:

- Undergraduate Advanced  
☐ Associate ☐ Graduate  
☐ Freshman ☐ Ph.D.  
☒ Sophomore  
☒ Junior  
☐ Senior

Current Major/Minor: Environmental Policy

Expected Graduation Date: June 2013

Please list any additional universities attended:

School/University Dates Attended

Transcript  
Enclosed

☐ Yes ☐ No

School/University Dates Attended

☐ Yes ☐ No

School/University Dates Attended

☐ Yes ☐ No

Names of Individual(s) Providing Reference: Dr. Jane Doe

## Eligibility

A NNEMS fellowship is available to any associate, undergraduate or advanced student who is:

- A citizen of the U.S., its territories or possessions, or lawfully admitted to the U.S. for permanent residency
- Enrolled for academic credit at an accredited educational institution<sup>1</sup>
- Pursuing an educational program directly related to pollution control or environmental protection for the duration of the fellowship

Please note: The following types of students are not eligible for a NNEMS fellowship:

- Federal employees, including those who are on "leave without pay" status
- Undergraduate and graduate students who will graduate before the NNEMS fellowship is completed (Students who complete their undergraduate studies before the end of a fellowship may apply if currently accepted or enrolled to a graduate program.)
- High school students

Additional requirements for associate, undergraduate and advanced students include the following:

### Associate and Undergraduate Students

- 3.0 cumulative grade point average (GPA) based on a scale of 4.0 at the time that the application is due (a GPA of 2.999, for example, is not sufficient)
- Completion of at least four courses related to the field of environmental studies

### Advanced Students

- Currently enrolled in a graduate or Ph.D. program or can provide proof of acceptance and enrollment to a graduate or Ph.D. program at the time of fellowship award. Students who are awaiting notification of acceptance must submit verification of acceptance and enrollment at the time of fellowship award.
- Completion of one semester of graduate or Ph.D. work, or at least four undergraduate courses related to the field of environmental studies

<sup>1</sup> The 2- or 4-year college, university or distance-learning institution must be accredited by a regional or national accrediting organization recognized by the U.S. Department of Education or the Council for Higher Education Accreditation ([www.chea.org](http://www.chea.org)).

## Proposal

**You may attach one additional page as necessary.**

**Proposed Research Plan:** Describe how you would conduct your research on this project.

Some well-placed phone calls can save a lot of time in the library, so my investigation would begin with a week or two of phone interviews with a range of people already familiar with (1) wetland protection issues, and (2) the impact of USAID, World Bank and IUCN policies on environmental media. I would include USAID and World Bank program officers, UNEP officers, UNEP officials, public interest organizations with international environmental programs, and academic specialists, as well as people within the EPA.

(continued on attached sheet)

**Relevant Information:** Describe your academic, professional or relevant experience that you believe qualifies you to conduct this research. For example, identify academic courses or research that enhances your qualifications.

Though I do not have a background in wetlands or water issues in general, I have been working for the past five years on international pesticide issues. I am already familiar with some of the mechanisms currently in place at the World Bank and USAID to regulate how their funds are used for pesticides. Last year, I wrote Problem Pesticides, Pesticide Programs and Analysis of the International Code of Conduct on the Distribution and Use of Pesticides approved in November 1986 by the FAO, as well as a guide on how to monitor for compliance with the code.

**Academic Goals:** State how you expect this project to support your academic and professional goals.

I would expect my end project to be a report summarizing the impacts these agencies are having on wetlands, along with a substantive analysis of the legal and political factors driving these impacts. The report would also include specific recommendations for policy changes. This project would allow me to gain hands-on experience in international policy as it relates to environmental issues, which dovetails with the Environmental Management program I am pursuing. This real world experience would reinforce the topics I have studied in school, allow me to explore wetlands issues in more depth, and give me crucial background experience to help me find a job in the environmental public policy field upon graduation.

## Application Package Checklist

	Yes	No		Original	2 Copies	Mailed Separately
Are you a citizen of the U.S., its territories or possessions, or lawfully admitted to the U.S. for permanent residency (a lawful permanent resident must provide his or her green card number on his or her application)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Students must submit <b>three</b> complete application packages for each project (one original and two copies). Please note that only one official transcript is required, which may be opened and copied, even if a student is applying for multiple projects. Please verify that you have included:			
Are you enrolled at an accredited school?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A completed Application Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Are you a federal employee? Federal employees, including those who are on "leave without pay" status, are not eligible for a NNEMS Fellowship.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	A completed Standard Form 424 (SF 424)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do you have a minimum 3.0 GPA?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A résumé	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Confidential Information</b>	Yes	No	An official college transcript from each school attended	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does your application package contain information that you consider to be confidential?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	A Reference Form from a professor or advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Be sure to clearly mark confidential information</b>			A completed NNEMS Disclosure and Waiver Statement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Verification of acceptance and/or enrollment in a graduate or Ph.D. program if applicant is a graduating senior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Complete application packages must be submitted for each NNEMS project.  
Applications must be postmarked on or before **January 30, 2012**.

Send the completed application package to:  
NNEMS Fellowship Program  
Tetra Tech EM Inc.  
1881 Campus Commons Drive, Suite 200  
Reston, VA 20191

# Standard Form 424 – Application for Federal Assistance

**Following are instructions for completing the Standard Form 424 (SF-424) Application for Federal Assistance. An interactive pdf version of this form is available online at [www.epa.gov/education/NNEMS/2012apply.html](http://www.epa.gov/education/NNEMS/2012apply.html). As listed below, several fields on the SF-424 should be left blank.**

1. Enter "Preapplication."
2. Enter "New."
3. Leave blank.
4. Leave blank.
5. Federal Entity Identifier: Leave blank.  
Federal Award Identifier: Leave blank.
6. Leave blank.
7. Leave blank.
8. Legal Name: Enter your legal name in this order: last name, first name, middle initial/name.  
Employer/Taxpayer Identification Number (EIN/TIN): Enter "123456789."  
Organizational DUNS: Leave blank.  
Address: Enter the address (including street, city, state, and zip code) you are currently using to receive United States Postal Service mail.  
Organizational Unit: Leave blank.  
Name and contact information of person to be contacted on matters involving this application: Enter your name, telephone number, and email address. Your middle name, suffix, and fax number are optional.
9. Enter "P. Individual."
10. Enter "Environmental Protection Agency."
11. Enter "66.952."
12. Enter "EPA-EED-12-01."
13. Leave blank.
14. Leave blank.
15. Enter the project title of the fellowship for which you are applying.
16. List your Congressional District under "Applicant." Under "Program/Project," list the Congressional District for the fellowship project location. To identify the appropriate Congressional District, go to **[www.house.gov](http://www.house.gov)** and enter your nine digit zip code to identify your representative and district.
17. Enter the project start and end dates for the fellowship for which you are applying.
18. Leave blank.
19. Enter "c. Program is not covered by E.O. 12372."
20. Self-explanatory.
21. Enter your name, title, telephone number and email address. "Student" or "Graduate Student" is an appropriate title. Print a hard-copy of the SF 424 and sign the pre-application.

### Application for Federal Assistance SF-424

**\* 1. Type of Submission:**

- ☐ Preapplication  
☐ Application  
☐ Changed/Corrected Application

**\* 2. Type of Application:**

- ☐ New  
☐ Continuation  
☐ Revision

**\* If Revision, select appropriate letter(s):**

**\* Other (Specify)**

**\* 3. Date Received:**

**4. Applicant Identifier:**

**5a. Federal Entity Identifier:**

**\* 5b. Federal Award Identifier:**

**State Use Only:**

**6. Date Received by State:**

**7. State Application Identifier:**

**8. APPLICANT INFORMATION:**

**\* a. Legal Name:**

**\* b. Employer/Taxpayer Identification Number (EIN/TIN):**

**\* c. Organizational DUNS:**

**d. Address:**

**\* Street1:**

**Street2:**

**\* City:**

**County:**

**\* State:**

**Province:**

**\* Country:**

USA: UNITED STATES

**\* Zip / Postal Code:**

**e. Organizational Unit:**

**Department Name:**

**Division Name:**

**f. Name and contact information of person to be contacted on matters involving this application:**

**Prefix:**

**\* First Name:**

**Middle Name:**

**\* Last Name:**

**Suffix:**

**Title:**

**Organizational Affiliation:**

**\* Telephone Number:**

**Fax Number:**

**\* Email:**

**Application for Federal Assistance SF-424****9. Type of Applicant 1: Select Applicant Type:**

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

**\* 10. Name of Federal Agency:****11. Catalog of Federal Domestic Assistance Number:**

CFDA Title:

**\* 12. Funding Opportunity Number:**

\* Title:

**13. Competition Identification Number:**

Title:

**14. Areas Affected by Project (Cities, Counties, States, etc.):****\* 15. Descriptive Title of Applicant's Project:**

Attach supporting documents as specified in agency instructions.

**Application for Federal Assistance SF-424****16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

\* a. Federal

\* b. Applicant

\* c. State

\* d. Local

\* e. Other

\* f. Program Income

\* g. TOTAL

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**☐ a. This application was made available to the State under the Executive Order 12372 Process for review on☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.☐ c. Program is not covered by E.O. 12372.**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.) Applicant Federal Debt Delinquency Explanation**☐ Yes☐ No

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

☐ \*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix:

\* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Telephone Number:

Fax Number:

\* Email:

\* Signature of Authorized Representative:

\* Date Signed:

**Application for Federal Assistance SF-424****\* Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.



# Sample SF-424

OMB Number: 4040-0004  
Expiration Date: 03/31/2012

Application for Federal Assistance SF-424		
<b>* 1. Type of Submission:</b> <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application		
<b>* 2. Type of Application:</b> <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision		
<b>* If Revision, select appropriate letter(s):</b> <input type="text"/> <b>* Other (Specify)</b> <input type="text"/>		
<b>* 3. Date Received:</b> <input type="text"/>		<b>4. Applicant Identifier:</b> <input type="text"/>
<b>5a. Federal Entity Identifier:</b> <input type="text"/>		<b>* 5b. Federal Award Identifier:</b> <input type="text"/>
<b>State Use Only:</b>		
<b>6. Date Received by State:</b> <input type="text"/>		<b>7. State Application Identifier:</b> <input type="text"/>
<b>8. APPLICANT INFORMATION:</b>		
<b>* a. Legal Name:</b> <input type="text" value="Doe, John H."/>		
<b>* b. Employer/Taxpayer Identification Number (EIN/TIN):</b> <input type="text"/>		<b>* c. Organizational DUNS:</b> <input type="text"/>
<b>d. Address:</b>		
<b>* Street1:</b> <input type="text" value="123 Hill Street"/>		
<b>Street2:</b> <input type="text"/>		
<b>* City:</b> <input type="text" value="Anytown"/>		
<b>County:</b> <input type="text"/>		
<b>* State:</b> <input type="text" value="VA"/>		
<b>Province:</b> <input type="text"/>		
<b>* Country:</b> <input type="text" value="USA: UNITED STATES"/>		
<b>* Zip / Postal Code:</b> <input type="text" value="22205"/>		
<b>e. Organizational Unit:</b>		
<b>Department Name:</b> <input type="text"/>		<b>Division Name:</b> <input type="text"/>
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
<b>Prefix:</b> <input type="text"/>		<b>* First Name:</b> <input type="text" value="John"/>
<b>Middle Name:</b> <input type="text"/>		
<b>* Last Name:</b> <input type="text" value="Doe"/>		
<b>Suffix:</b> <input type="text"/>		
<b>Title:</b> <input type="text" value="Student"/>		
<b>Organizational Affiliation:</b> <input type="text"/>		
<b>* Telephone Number:</b> <input type="text" value="(123) 456-7891"/>		<b>Fax Number:</b> <input type="text"/>
<b>* Email:</b> <input type="text" value="johndoe@email.com"/>		

# Sample SF-424

## Application for Federal Assistance SF-424

### 9. Type of Applicant 1: Select Applicant Type:

P. Individual

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

### \* 10. Name of Federal Agency:

Environmental Protection Agency

### 11. Catalog of Federal Domestic Assistance Number:

66.952

CFDA Title:

### \* 12. Funding Opportunity Number:

EPA-EED-12-01

\* Title:

NNEMS Fellowship Program

### 13. Competition Identification Number:

Title:

### 14. Areas Affected by Project (Cities, Counties, States, etc.):

### \* 15. Descriptive Title of Applicant's Project:

Outreach for Air Quality Designations

Attach supporting documents as specified in agency instructions.

**Application for Federal Assistance SF-424****16. Congressional Districts Of:**\* a. Applicant Virginia 8<sup>th</sup>\* b. Program/Project North Carolina 4<sup>th</sup>

Attach an additional list of Program/Project Congressional Districts if needed.

**17. Proposed Project:**

\* a. Start Date: 5/14/2012

\* b. End Date: 8/24/2012

**18. Estimated Funding (\$):**

\* a. Federal

\* b. Applicant

\* c. State

\* d. Local

\* e. Other

\* f. Program Income

\* g. TOTAL

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**☐ a. This application was made available to the State under the Executive Order 12372 Process for review on .☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.☐ c. Program is not covered by E.O. 12372.**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.) Applicant Federal Debt Delinquency Explanation**☐ Yes☒ No

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

☒ \*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**Prefix: 

\* First Name: John

Middle Name: 

\* Last Name: Doe

Suffix: 

\* Title: Student

\* Telephone Number: 123-456-7891

Fax Number: 

\* Email: Johndoe@email.com

\* Signature of Authorized Representative: *John Doe*

\* Date Signed: January 26, 2012

# Sample SF-424

## Application for Federal Assistance SF-424

### \* Applicant Federal Debt Delinquency Explanation

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.

## Instructions for the Reference

Thank you for providing a reference for a NNEMS fellowship applicant. Before you begin, please note that this reference is not intended to be confidential. Please submit the completed form to the applicant identified below, to be included in the application package. You may submit the reference under separate cover at the address provided below, but it must be postmarked on or before **January 30, 2012**:

NNEMS Fellowship Program  
 Tetra Tech EM Inc.  
 1881 Campus Commons Drive, Suite 200  
 Reston, VA 20191

## To be Completed by Applicant

Project Number: 2012- \_\_\_\_\_  
 Applicant's Name: \_\_\_\_\_  
 Current Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Current Phone: ( \_\_\_\_ ) \_\_\_\_ - \_\_\_\_\_  
 Current Email: \_\_\_\_\_  
 School/University: \_\_\_\_\_  
 Current Major/Minor: \_\_\_\_\_  
 Expected Graduation Date: \_\_\_\_\_

## To be Completed by the Reference

Name of Individual  
 Providing Reference: \_\_\_\_\_  
 Current Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Current Phone: ( \_\_\_\_ ) \_\_\_\_ - \_\_\_\_\_  
 Current Email: \_\_\_\_\_  
 Position or Title: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Institution: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

(Reference Form continued on next page)

# Reference Form

## Reference

The applicant named above is applying for a NNEMS fellowship. What are your personal impressions of the candidate's ability to perform the proposed fellowship? Include how the fellowship relates to and will further the student's academic goals. Please comment on the quality of his or her work, and promise of productive scholarship. Please explain in what capacity you have known the applicant and for what time period.

## Rating:

Please rate this student in overall promise in comparison with other individuals with whom you have known at similar stages in their academic studies by checking the appropriate boxes.

	Outstanding	Excellent	Good	Fair	Poor	Not Applicable
Academic Performance						
Motivation for Proposed NNEMS Research Plan						
Research and Writing Ability						
Leadership Skills and Written Communication Skills						

# NNEMS Disclosure and Waiver Statement

Please complete and submit with NNEMS application package. This form may be photocopied.

I understand that the National Network for Environmental Management Studies (NNEMS) Program fellows are not employees of the U.S. Environmental Protection Agency (EPA) or the U.S. government. Thus, if selected to be a NNEMS fellow, I will not receive typical federal employee benefits including, but not limited to, health insurance, life insurance, annual leave, and sick leave.

In addition, I understand that in the event of an accident causing injury to myself while either performing my assigned functions or traveling, the U.S. government is not liable for any injury or harm I may incur. Further, I understand that the U.S. government is not liable for any injury or harm I may cause another person or persons while performing my assigned functions or traveling for the EPA. As such, I understand that I am responsible for any injury or harm I cause to myself or others as a result of my actions.

By signing this form, I acknowledge that I fully understand the provisions contained in this statement regarding my status as a NNEMS fellow and the consequences of my actions while working as a NNEMS fellow. As a result, I have considered the possibility of obtaining personal insurance during my NNEMS fellowship.

Name: \_\_\_\_\_ School: \_\_\_\_\_

Home Address: \_\_\_\_\_ Project # Applied For: 2012 - \_\_\_\_\_

\_\_\_\_\_ Project Category: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Home Phone Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## Appendix B – NNEMS Program Coordinators

Listed on the following pages are the NNEMS Program Coordinators at approximately 200 colleges, universities, and distance-learning organizations throughout the U.S. Program Coordinators act as representatives of the NNEMS program by promoting the program on campus and assisting students in the preparation of their applications.

The Program Coordinators are sorted in alphabetical order by name of organization.

**Please note:** Any eligible student enrolled for academic credit at an accredited 2- or 4-year college, university, or distance-learning institution may apply for a NNEMS fellowship, regardless of whether or not there is a NNEMS Program Coordinator at their university.



**American University**

Susan Gordon, Career Advisor,  
College of Arts and Science  
Career Center  
4400 Massachusetts Avenue NW  
Washington, DC 20016

Kiho Kim  
Department of Environmental Science  
4400 Massachusetts Avenue NW  
Hurst Hall 101  
Washington, DC 20016-8007

**Appalachian State University**

Carol Babyak, Assistant Professor  
Chemistry  
525 Rivers Street  
Boone, NC 28608

**Bard College**

Jennifer Phillips, Professor  
Center for Environmental Policy  
P.O. Box 5000  
Annandale-on-Hudson, NY 12504

**Bellevue University**

Che Thompson  
Liberal Arts Professional Application  
4269 Wirt Street  
Omaha, NE 68111

**Benedictine College**

Becky Gilmore, Director  
Career Development  
1020 N. 2nd Street  
Atchison, KS 66002

Janet Wilcox, Assistant Academic Dean  
Student Success Center  
1020 N. 2nd Street  
Atchison, KS 66002

**Binghamton University**

JoAnn Lindstrom, Internship Coordinator  
Public Administration  
P.O. Box 6000  
Binghamton, NY 13902-6000

**Black Hills State University**

Christien McCart, Outdoor Education Program  
Coordinator Outdoor Education Program  
1200 University Street #9401  
Spearfish, SD 57799-9401

**Boston University**

Sayaka Yamaki, Program Coordinator  
Geography & Environment  
675 Commonwealth Avenue, 4th Floor  
Boston, MA 02215

**Brandeis University**

Laura Goldin, Professor, Director of Internship Program  
Environmental Studies  
415 South Street  
MS008  
Waltham, MA 01720

**Brigham Young University**

Bryan Hopkins  
Plant and Wildlife Sciences  
685 E. University Parkway  
Provo, UT 84602

**Bryn Mawr College**

Don Barber, Associate Professor &  
Director of Environmental Studies  
Geology  
101 N. Merion Avenue  
Park Science Bldg  
Bryn Mawr, PA 19010

**Buena Vista University**

Anne Quail, Internship Coordinator  
Career Services  
610 W. Fourth Street  
Storm Lake, IA 50588

**Bunker Hill Community College/  
Suffolk University Joint Program**

Emyq McSweeney  
Biology/Marine Science  
3 Forbes Street  
Jamaica Plain, MA 02130

**Cabrini College**

Nancy Hutchison, Director  
Cooperative Education and Career Services  
610 King of Prussia Road  
Radnor, PA 19087-3698

**California Institute of Technology**

Dian Buchness, Senior Academic Assistant  
Environmental Science and Engineering  
1201 E. California Boulevard  
Pasadena, CA 91125

Linda Scott, Option Secretary  
Environmental Science & Engineering (138-78)  
1200 East California Boulevard  
Pasadena, CA 91125

**California State University, Chico**

William Lerch, Director  
Office of Experiential Education  
400 West 1st Street  
Chico, CA 95929-0818

**California State University, Northridge**

Janice Potzmann, Assistant Director,  
Transfer & Experiential Learning Programs  
Career Center  
18111 Nordhoff Street  
University Hall Suite 105  
Northridge, CA 91330-8241

**California State University, Sacramento**

Cici Mattiuzzi, Director, Career Services  
College of Engineering and Computer Science  
6000 J Street  
Sacramento, CA 95819-6023

**California State University, San Francisco**

Joy Viveros, Fellowship Advisor  
Advising Center  
1600 Holloway Avenue, Admin. 211  
San Francisco, CA 94132

**California University of Pennsylvania**

Meaghan Clister, Coordinator of Cooperative Education  
Career Services  
250 University Avenue  
California, PA 15419

**Carnegie Mellon University**

David Dzombak, Faculty Director  
Steinbrenner Institute for Environmental Education  
and Research  
5000 Forbes Avenue  
Porter Hall 119  
Pittsburgh, PA 15213-3890

Deborah Lange, Executive Director  
Steinbrenner Institute, Western Pennsylvania  
Brownfields Center  
Hamburg Hall 1209  
5000 Forbes Avenue  
Pittsburgh, PA 15213

**Catholic University of America**

Kristen McManus, Director  
Columbus School of Law  
Office of Legal Career Services  
Room 163  
Washington, DC 20064-8020

**Centre College**

Melinda Wilson, Internship and Outreach Coordinator  
Career Services  
600 W. Walnut Street  
Danville, KY 40422

**Chestnut Hill College**

Robert Meyer, Professor of Biology  
Biology  
9601 Germantown Avenue  
Philadelphia, PA 19118-2693

**Clark Atlanta University**

Donnita Raglin, Director  
Leadership and Professional Development  
and Cooperative Education  
223 James P. Brawley Drive, S.W.  
Atlanta, GA 30314

**Clark University**

Brian Cook, Professor and MPA Director  
Department of Government  
950 Main Street  
Worcester, MA 01610-1477

**Clemson University**

Alan Elzerman, Director  
School of the Environment  
342 Computer Court  
Anderson, SC 29625

Cindy Lee, Professor  
Environmental Engineering & Earth Sciences  
342 Computer Court  
Anderson, SC 29625

**Coastal Carolina University**

Ned Cohen, Director  
Wall Center for Excellence Wall College of Business  
Administration  
P.O. Box 261954  
Conway, SC 29528-605

**College of New Jersey**

Deb Kelly  
Office of Career Services  
1938 Pennington Road  
Ewing, NJ 08628

**College of Staten Island**

Geoff Hempill  
Career and Scholarship Center (1A-105)  
2800 Victory Boulevard  
Building 1A-105  
Staten Island, NY 10314

**College of William and Mary**

Lisa Grimes, Director of Fellowships and  
Undergraduate Research  
Charles Center  
P.O. Box 8795  
Williamsburg, VA 23187-8795

**Colorado State University**

Erin Reichert, Undergraduate Coordinator  
Environmental and Radiological Health Sciences  
105 Environmental Health  
1681 Campus Delivery  
Fort Collins, CO 80526-1681

**Connecticut College**

Jack Tinker, Director of Recruiting  
Career Office  
270 Mohegan Avenue  
New London, CT 06320

**Coppin State University**

Seana Coulter, Cooperative  
Education/Internship Coordinator  
Career Development & Co-op Center  
2500 West North Avenue  
Baltimore, MD 21216

**Cornell University**

Bill Alberta, Associate Director  
Career Services  
103 Barnes Hall  
Ithaca, NY 14853

**Cuyahoga Community College, Eastern Campus**

Herbert Mausser, Program Manager  
Environmental Health and Safety Technology  
4250 Richmond Road  
Highland Hills, OH 44122-6195

**Dartmouth College**

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Career Services  
63 South Main Street  
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Hanover, NH 03755-3586

**Davidson College**

Brenda Harvey, Recruiting Coordinator  
Career Services  
Box 7180  
Davidson, NC 28035

**Delaware State University**

Vita Pickrum, Assistant Vice President for Development  
Office of Development  
1200 N. DuPont Highway  
Dover, DE 19901

**Delaware Valley College**

Bryan Barts, Assistant Director - Employer  
Relations and Recruiting  
Career and Life Education  
700 E. Butler Avenue  
Doylestown, PA 18901

Tracy DePedro, Director  
Office of Career & Life Education  
700 E. Butler Avenue  
Doylestown, PA 18901

**Denison University**

Pamela Allen, Director & Pre-Professional Advisor  
Career Services  
306 Burton Morgan Center, 150 Ridge Road  
Granville, OH 43023

**Duke University**

Elise Goldwasser, Undergraduate Internship Coordinator  
Sanford Institute of Public Policy  
Box 90247  
Durham, NC 27708

Karen Kirchof, Assistant Dean for Career Services  
Nicholas School of Environment and Earth Sciences  
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Durham, NC 27708-0331

**Duquesne University**

Robert Volkmar, Interim Director  
Center for Environmental Research and Education  
332 Fisher Hall  
Pittsburgh, PA 15282-0100

**Eastern Kentucky University**

Billy Bennett, Director, Center for Environmental Education  
Division of Natural Areas  
EKU Case Annex #105  
521 Lancaster Ave  
Richmond, KY 40391

**Elizabeth City State University**

Sandra Gibson, Assistant Director, Career Services  
Office of Career Services  
Campus Box 804  
Elizabeth City, NC 27909

**Elmira College**

William Couchon  
Office of Counseling and Career Services  
One Park Place  
Elmira, NY 14901

### **Embry-Riddle Aeronautical University, Prescott Campus**

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College of Arts & Sciences Career Services  
3200 Willow Creek Road  
Prescott, AZ 86301-3720

Michael Gregory, Program Manager  
Career Services  
3700 Willow Creek Road  
AC1-234  
Prescott, AZ 86301

### **Emory University**

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Rollins School of Public Health, Career Services  
1518 Clifton Road, NE  
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Atlanta, GA 30322

### **Endicott College**

Devin Rozansky, Internship Coordinator  
Internship Office  
376 Hale Street  
Beverly, MA 01915

### **Florida State University**

Jamie Purcell, Director  
Office of National Fellowships  
A3550 University Center  
Tallahassee, FL 32306-2449

Anne West, Director, Office of Graduate  
Fellowships and Awards  
The Graduate School  
0027D Scholars Commons, Strozier Library  
116 Honors Way  
Tallahassee, FL 32306

### **Fordham University**

Laura Ebert, Grants and Contracts Administrator  
Office of Sponsored Programs  
441 East Fordham Road  
Bronx, NY 10458

### **Franklin College**

Hisaya Kitaoka, Assistant Professor of Economics  
Economics, Business and Accounting Department  
101 Branigin Boulevard  
Franklin, IN 46131

### **Franklin & Marshall College**

Sarah Dawson, Acting Director  
Wohlsen Center for the Sustainable Environment  
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Lancaster, PA 17602-3003

### **GateWay Community College**

Mario Castaneda, Full Time Faculty  
Water Resources Technology Program  
108 N. 40th Street  
Phoenix, AZ 85034

### **George Mason University**

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Management Program  
Environmental Science and Policy  
4400 University Drive, MSN 5F2  
Fairfax, VA 22030-4444

### **George Mason University**

Gemma Scallon, Career Counselor  
University Career Services  
Mail Stop 3B6  
Fairfax, VA 22030-4444

### **George Washington University**

Paul Binkley, Director, Career Development Services  
Trachtenberg School of Public Policy and  
Public Administration  
805 21st Street, NW, Suite 601  
Washington, DC 20052

### **George Washington University**

Marlene McGuirl, Adjunct Professor  
Environmental Resource Policy  
3416 P Street NW  
Washington, DC 20007-2705

### **Georgia College & State University**

Caralyn Zehnder, Assistant Professor &  
Environmental Sciences Program Coordinator  
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Campus Box 81  
Milledgeville, GA 31061

### **Gordon College**

Rita Dove, Assistant Director  
Office of Cooperative Education  
255 Grapevine Road  
Wenham, MA 01984

### **Grand Valley State University**

Erik Nordman, Assistant Professor/  
Program Coordinator  
Biology/Natural Resources Management Program  
212 Henry Hall  
1 Campus Drive  
Allendale, MI 49401

### **Gustavus Adolphus College**

Jeff Jeremiason, Director of Environmental Studies  
Environmental Studies  
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St Peter, MN 56082

**Hamilton College**

David Bell, Senior Associate Director  
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Clinton, NY 13323

**Hampden-Sydney College**

Laura Neidert, Assistant Director of Career Development & Internship Coordinator  
Career Development Office  
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Hampden-Sydney, VA 23943

**Harvard University, School of Public Health**

Peter Crudele, Director, Career Services  
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677 Huntington Avenue  
Kresge, G18  
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**Hiram College**

Kathryn Craig, Director  
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**Hobart and William Smith Colleges**

Lana Cao, Assistant Director  
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300 Pulteney Street  
Geneva, NY 14456

Michele Maliwauki, Assistant Director  
Salisbury Center for Career Services  
Trinity Hall  
Geneva, NY 14456

**Hofstra University**

Suzanne Dagger, Director of Career Services  
Career Center  
140 Hofstra University  
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Hempstead, NY 11758

**Houston Community College, Northwest**

Sam Dibrell, Counselor  
Student Services  
1550 Fox Lake Drive  
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Houston, TX 77084

Supriya Sihi, Professor of Chemistry  
Physical Sciences  
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**Idaho State University**

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**Illinois State University**

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**Illinois Wesleyan University**

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**Imperial Valley College**

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**Indiana University**

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Bloomington, IN 47405

Katie Sewell, Career Advisor/Internship Coordinator  
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**Inter American University of Puerto Rico**

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Parque Industrial Turpó, Rd # 1  
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**Iowa State University**

Say Kee Ong, Professor  
Department of Civil, Construction, and Environmental Engineering  
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**Ithaca College**

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Environmental Studies/Biology  
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Kristin LiBritz, Employer Relations Coordinator  
Office of Career Services  
1101 Gannett Center  
953 Danby Road  
Ithaca, NY 14850

**Kansas State University**

Beverly Page, Information Specialist  
Research & Sponsored Programs  
102 Fairchild Hall  
Manhattan, KS 66506-1103

**Keystone College**

Sharon Burke, Executive Director  
Sustainability  
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La Plume, PA 18440

**Lake City Community College**

Merni Stringfellow, Instructor  
Allied Health  
166 SW Karen Ct  
Lake City, FL 32025

**Lake Forest College**

Heather Brown, Assistant Dean of Faculty  
Dean of Faculty's Office  
555 N Sheridan Road  
Lake Forest, IL 60045

**Lawrence University**

Kristi Hill, Coordinator of Internships and  
Volunteer Programs  
Career Center  
P.O. Box 599  
Appleton, WI 54912-0599

**Lehigh University**

Dork Sahagian, Director  
Environmental Initiative  
31 Williams Drive  
Office 105  
Bethlehem, PA 18015

**Long Island University, Brooklyn Campus**

Amy Rothenberg, Associate Director  
Career Services  
1 University Plaza  
Brooklyn, NY 11201

Amy Rothenberg, Associate Director  
Career Services  
1 University Plaza  
Brooklyn, NY 11201

**Loyola University, Maryland**

Arthur Sutherland, Director,  
National Fellowships Office  
4501 N. Charles Street  
Baltimore, MD 21210

**Loyola University, New Orleans**

Eileen Doll, Fellowships Coordinator  
University Honors Program  
6363 St. Charles Avenue  
Box 75  
New Orleans, LA 70118

**Luther College**

James Arthur, Assistant Director of Experiential Education  
The Career Center  
700 College Drive  
Decorah, IA 52101

**Madonna University**

Ingrid Kroeger, Assistant Director  
Career Services  
36600 Schoolcraft Road  
Livonia, MI 48154-1926

**McNeese State University**

Frank Phillips, Assistant Professor/Graduate Faculty  
Biological & Environmental Sciences  
4205 Ryan Street  
Lake Charles, LA 70605

**Miami University (Ohio)**

Catherine Almquist, Assistant Professor  
Paper and Chemical Engineering  
246 Gaskill Hall  
Oxford, OH 45056

**Montclair State University**

Huan Feng, Professor  
Earth and Environmental Studies  
1 Normal Avenue  
Montclair, NJ 07043



**Mount Holyoke College**

Joanna Miles, Senior Associate Director  
Career Development Center  
50 College Street  
South Hadley, MA 01075

**Muhlenberg College**

Patricia Bradt, Associate Professor Emeriti  
Environmental Sciences Program  
2400 Chew Street, Department of Biology  
Allentown, PA 18104-5586

**New College of Florida**

Jeanne Ware, Director  
Office of Research Programs and Services  
5800 Bay Shore Road  
COH 212  
Sarasota, FL 34243-2109

**New Jersey City University**

Jennifer Jones, Director  
Academic Career Planning and Placement  
2039 Kennedy Boulevard  
Jersey City, NJ 07305

**New Jersey Institute of Technology**

Taha Marhaba, Professor and Chairman  
Civil & Environmental Engineering  
323 MLK Boulevard  
Newark, NJ 07102

**New York University**

Mary Leou, Director, Environmental Conservation  
Education Program  
Teaching and Learning  
34 Stuyvesant Street, 5th Floor  
New York, NY 10003

Emily Westerman, Associate Director  
SCPS Office of Career Management  
15 Barclay Street, Room 222  
New York, NY 10007

**North Carolina A&T State University**

Pamela Basheer, Assistant Director  
for Experiential Learning  
Office of Career Services  
1601 East Market Street  
Suite 101, Murphy Hall  
Greensboro, NC 27411

**North Carolina Central University**

Donna Hembrick, Interim Director  
Career Services  
1801 Fayetteville Street  
P.O. Box 19585  
Durham, NC 27703

**Northeastern University**

Diane Ciarletta, Associate Director  
Career Services  
360 Huntington Avenue  
P.O. Box 895  
Boston, MA 02117

**Northwestern University**

Dianne Siekmann, Associate Director  
University Career Services  
620 Lincoln Street  
Evanston, IL 60208

**Ohio University**

Michele Morrone, Associate Professor  
Environmental Health Sciences  
School of Health Sciences  
E342 Grover Center  
Athens, OH 45701

**Oregon State University**

Wanda Crannell, Key Advisor/Instructor  
Bioresource Research, Interdisciplinary Sciences Program  
and OSU-MANRRS Advisor  
137 Strand Agriculture Hall  
Corvallis, OR 97331-7304

Tom Savage, Professor and Head Advisor  
Department of Animal Sciences  
114 Withycombe Hall  
Corvallis, OR 97331-6702

**Pace University**

Richard Schlesinger, Associate Dean for Academic Affairs  
Program in Environmental Science  
One Pace Plaza  
New York, NY 10038

**Penn State University, Altoona**

Thomas Shaffer  
Academic Internships  
3000 Iyyside Park  
Altoona, PA 16601-3760

**Penn State University, University Park**

Keith Fledderman, Program Coordinator  
Penn State Washington Program  
P.O. Box 9291  
Arlington, VA 22219

Susan Knell, Director, Science Career  
and International Education  
Eberly College of Science  
108 Whitmore Laboratory  
University Park, PA 16802

### **Penn State University, University Park (continued)**

Cindy Rudy, Assistant Director  
Eberly College of Science  
Office of Cooperative Education  
108 Whitmore Laboratory  
University Park, PA 16802

Robert Shannon, Program Coordinator  
Environmental Resource Management  
119 Ag. Administration Building  
University Park, PA 16802

### **Pepperdine University**

Jody Brightman, Director, Career Services  
School of Public Policy  
24255 Pacific Coast Highway  
Malibu, CA 90263

### **Pomona College**

Richard Hazlett, Professor  
Geology/Environmental Analysis  
185 East Sixth Street  
Claremont, CA 91711

### **Princeton University**

Ann Corwin, Director of Graduate Career Services  
& Alumni Relations  
Woodrow Wilson School  
203 Robertson Hall  
Princeton, NJ 08544-1013

### **Principia College**

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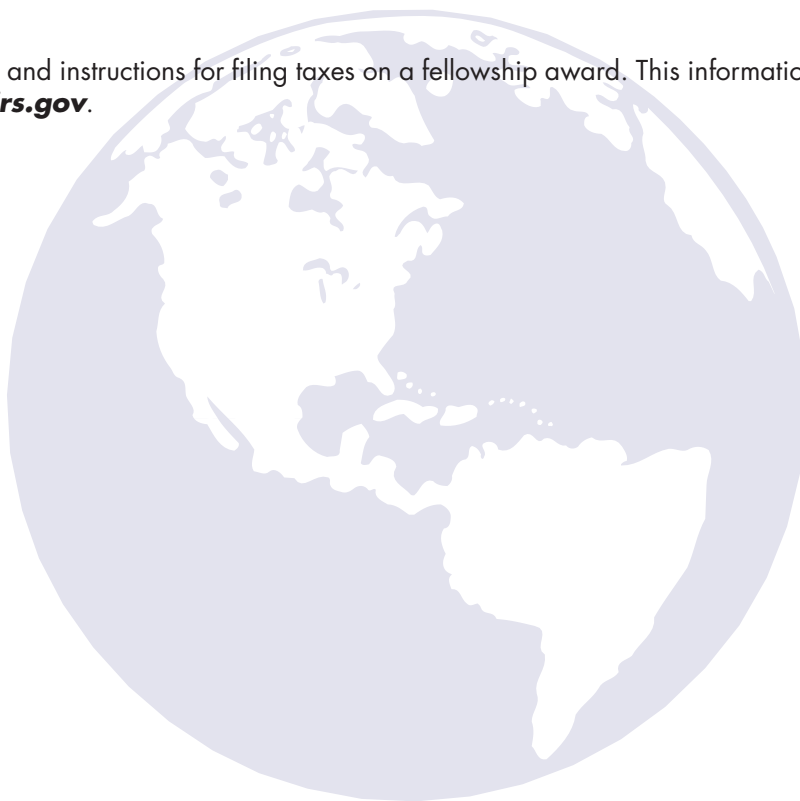
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# Appendix C – IRS Publication 970: Tax Benefits for Education

This appendix includes detailed information and instructions for filing taxes on a fellowship award. This information may be obtained directly online at **[www.irs.gov](http://www.irs.gov)**.







Department of the Treasury  
Internal Revenue Service

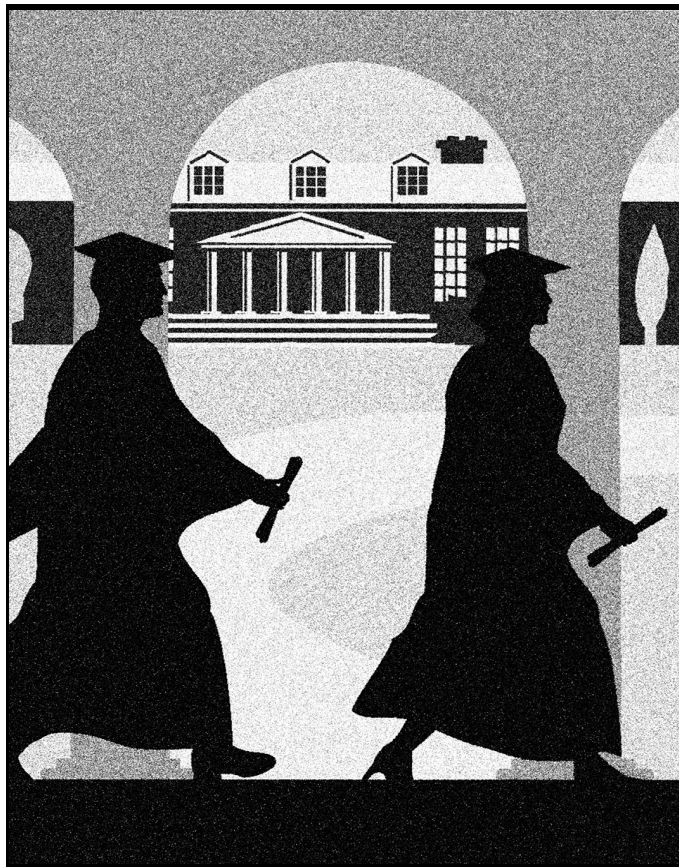
## Publication 970

Cat. No. 25221V

# Tax Benefits for Education

For use in preparing

**2010** Returns



Get forms and other information  
faster and easier by:

Internet [IRS.gov](http://IRS.gov)

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## What's New

**Hope credit.** For 2010, the Hope credit is not available. However, you may be able to claim an American opportunity or lifetime learning credit. See chapters [2](#) and [3](#) for more information.

**Increased income thresholds for education savings bond program.** For 2010, the amount of your interest exclusion will be gradually reduced (phased out) if your filing status is married filing jointly or qualifying widow(er) and your modified adjusted gross income (MAGI) is between \$105,100 and \$135,100. You cannot take the deduction if your MAGI is \$135,100 or more. For 2009, the limits that applied to you were \$104,900 and \$134,900.

For all other filing statuses, your interest exclusion for 2010 is phased out if your MAGI is between \$70,100 and \$85,100. You cannot take the deduction if your MAGI is \$85,100 or more. For 2009, the limits that applied to you were \$69,950 and \$84,950. For more information, see [chapter 10](#).

**Business deduction for work-related education.** For 2010, if you drive your car to and from school and qualify to deduct transportation expenses, the amount you can deduct for miles driven during 2010 is 50 cents per mile. This is down from 55 cents per mile during 2009. See [chapter 12](#) for more information.

## Reminders

**Estimated tax payments.** If you have taxable income from any of your education benefits and the payer does not withhold enough income tax, you may need to make estimated tax payments. For more information, see Publication 505, Tax Withholding and Estimated Tax.

**Photographs of missing children.** The Internal Revenue Service is a proud partner with the National Center for Missing and Exploited Children. Photographs of missing children selected by the Center may appear in this publication on pages that would otherwise be blank. You can help bring these children home by looking at the photographs and calling 1-800-THE-LOST (1-800-843-5678) if you recognize a child.

## Introduction

This publication explains tax benefits that may be available to you if you are saving for or paying education costs for yourself or, in many cases, another student who is a member of your immediate family. Most benefits apply only to higher education.

**What is in this publication.** Chapter 1 explains the tax treatment of various types of educational assistance, including scholarships, fellowships, and tuition reductions.

Two tax credits for which you may be eligible are explained in chapters 2 and 3. These benefits, which reduce the amount of income tax you may have to pay, are:

- The American opportunity credit, and
- The lifetime learning credit.

Ten other types of benefits are explained in chapters 4 through 12. With these benefits, you may be able to:

- Deduct student loan interest;
- Receive tax-free treatment of a canceled student loan;
- Receive tax-free student loan repayment assistance;
- Deduct tuition and fees for education;
- Establish and contribute to a Coverdell education savings account (ESA), which features tax-free earnings;
- Participate in a qualified tuition program (QTP), which features tax-free earnings;
- Take early distributions from any type of individual retirement arrangement (IRA) for education costs without paying the 10% additional tax on early distributions;
- Cash in savings bonds for education costs without having to pay tax on the interest;
- Receive tax-free educational benefits from your employer; and
- Take a business deduction for work-related education.

**Note.** You generally cannot claim more than one of the benefits described in the lists above for the same qualifying education expense.



**Comparison table.** Some of the features of these benefits are highlighted in [Appendix B](#), beginning on page 78 of this publication. This general comparison table may guide you in determining which benefits you may be eligible for and which chapters you may want to read.



*When you figure your taxes, you may want to compare these tax benefits so you can choose the method(s) that gives you the lowest tax liability. If you qualify, you may find that a combination of credit(s) and deduction(s) gives you the lowest tax.*

**Analyzing your tax withholding.** After you estimate your education tax benefits for the year, you may be able to reduce the amount of your federal income tax withholding. Also, you may want to recheck your withholding during the year if your personal or financial situation changes. See Publication 919, *How Do I Adjust My Tax Withholding*, for more information.

**Glossary.** In this publication, wherever appropriate, we have tried to use the same or similar terminology when referring to the basic components of each education benefit. Some of the terms used are:

- Qualified education expenses,
- Eligible educational institution, and
- Modified adjusted gross income.

Even though the same term, such as qualified education expenses, is used to label a basic component of many of the education benefits, the same expenses are not necessarily allowed for each benefit. For example, the cost of room and board is a qualified education expense for the qualified tuition program, but not for the education savings bond program.

Many of the terms used in the publication are defined in the glossary near the end of the publication. The glossary is not intended to be a substitute for reading the chapter on a particular education benefit, but it will give you an overview of how certain terms are used in discussing the different benefits.

**Comments and suggestions.** We welcome your comments about this publication and your suggestions for future editions.

You can write to us at the following address:

Internal Revenue Service  
Individual Forms and Publications Branch  
SE:W:CAR:MP:T:I  
1111 Constitution Ave. NW, IR-6526  
Washington, DC 20224

We respond to many letters by telephone. Therefore, it would be helpful if you would include your daytime phone number, including the area code, in your correspondence.

You can email us at [\\*taxforms@irs.gov](mailto:*taxforms@irs.gov). (The asterisk must be included in the address.) Please put "Publications Comment" on the subject line. You can also send us comments from [www.irs.gov/formspubs](http://www.irs.gov/formspubs), select "Comment on Tax Forms and Publications" under "Information about."

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Internal Revenue Service  
1201 N. Mitsubishi Motorway  
Bloomington, IL 61705-6613

**Tax questions.** If you have a tax question, check the information available on [IRS.gov](http://IRS.gov) or call 1-800-829-1040. We cannot answer tax questions sent to either of the above addresses.

## Useful Items

You may want to see:

### Publication

- ☐ **463** Travel, Entertainment, Gift, and Car Expenses
- ☐ **525** Taxable and Nontaxable Income
- ☐ **550** Investment Income and Expenses
- ☐ **590** Individual Retirement Arrangements (IRAs)

### Form (and Instructions)

- ☐ **1040** U.S. Individual Income Tax Return
- ☐ **1040A** U.S. Individual Income Tax Return
- ☐ **1040EZ** Income Tax Return for Single and Joint Filers With No Dependents
- ☐ **1040NR** U.S. Nonresident Alien Income Tax Return
- ☐ **1040NR-EZ** U.S. Income Tax Return for Certain Nonresident Aliens With No Dependents
- ☐ **2106** Employee Business Expenses
- ☐ **2106-EZ** Unreimbursed Employee Business Expenses
- ☐ **5329** Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts
- ☐ **8815** Exclusion of Interest From Series EE and I U.S. Savings Bonds Issued After 1989
- ☐ **8863** Education Credits (American Opportunity and Lifetime Learning Credits)
- ☐ **8917** Tuition and Fees Deduction
- ☐ **Schedule A (Form 1040)** Itemized Deductions

See [chapter 13](#), *How To Get Tax Help*, for information about getting these publications and forms.

## 1.

# Scholarships, Fellowships, Grants, and Tuition Reductions

## Reminder

**Individual retirement arrangements (IRAs).** You can set up and make contributions to an IRA if you receive taxable compensation. Under this rule, a taxable scholarship or fellowship is compensation only if it is shown in box 1 of your Form W-2, Wage and Tax Statement. For more information about IRAs, see Publication 590.

## Introduction

This chapter discusses the tax treatment of various types of educational assistance you may receive if you are studying, teaching, or researching in the United States. The educational assistance can be for a primary or secondary school, a college or university, or a vocational school. Included are discussions of:

- Scholarships,
- Fellowships,
- Need-based education grants, such as a Pell Grant, and
- Qualified tuition reductions.

Many types of educational assistance are tax free if they meet the requirements discussed here.

Special rules apply to U.S. citizens and resident aliens who have received scholarships or fellowships for studying, teaching, or researching abroad. For information about these rules, see Publication 54, Tax Guide for U.S. Citizens and Resident Aliens Abroad.

## Scholarships and Fellowships

A scholarship is generally an amount paid or allowed to, or for the benefit of, a student at an educational institution to aid in the pursuit of studies. The student may be either an undergraduate or a graduate.

A fellowship is generally an amount paid for the benefit of an individual to aid in the pursuit of study or research.

Table 1-1 provides an overview of the tax treatment of amounts received as a scholarship or fellowship (other than amounts received as payment for services). Generally, whether the amount is tax free or taxable depends on the expense paid with the amount and whether you are a degree candidate.

Table 1-1. **Tax Treatment of Scholarship and Fellowship Payments<sup>1</sup>**

*Do not rely on this table alone. Refer to the text for complete details.*

IF you use the payment for...	AND you are...		THEN your payment is...	
	A degree candidate	Not a degree candidate	Tax free <sup>2</sup>	Taxable
Tuition	X		X	
		X		X
Fees	X		X <sup>3</sup>	
		X		X
Books	X		X <sup>3</sup>	
		X		X
Supplies	X		X <sup>3</sup>	
		X		X
Equipment	X		X <sup>3</sup>	
		X		X
Room	X			X
		X		X
Board	X			X
		X		X
Travel	X			X
		X		X

<sup>1</sup> Does not include payments received for past, present, or future services.

<sup>2</sup> Payments used for any expenses indicated in this column are tax free only if the terms of the scholarship or fellowship do not prohibit the expense.

<sup>3</sup> If required of all students in the course.

## Tax-Free Scholarships and Fellowships

A scholarship or fellowship is tax free only if:

- You are a candidate for a degree at an eligible educational institution, and
- You use the scholarship or fellowship to pay qualified education expenses.

**Candidate for a degree.** You are a candidate for a degree if you:

1. Attend a primary or secondary school or are pursuing a degree at a college or university, or
2. Attend an accredited educational institution that is authorized to provide:
  - a. A program that is acceptable for full credit toward a bachelor's or higher degree, or
  - b. A program of training to prepare students for gainful employment in a recognized occupation.

**Eligible educational institution.** An eligible educational institution is one that maintains a regular faculty and curriculum and normally has a regularly enrolled body of students in attendance at the place where it carries on its educational activities.

**Qualified education expenses.** For purposes of tax-free scholarships and fellowships, these are expenses for:

- Tuition and fees required to enroll at or attend an eligible educational institution, and
- Course-related expenses, such as fees, books, supplies, and equipment that are required for the courses at the eligible educational institution. These items must be required of all students in your course of instruction.

However, in order for these to be qualified education expenses, the terms of the scholarship or fellowship cannot require that it be used for other purposes, such as room and board, or specify that it cannot be used for tuition or course-related expenses.

**Expenses that do not qualify.** Qualified education expenses do not include the cost of:

- Room and board,
- Travel,
- Research,
- Clerical help, or
- Equipment and other expenses that are not required for enrollment in or attendance at an eligible educational institution.

This is true even if the fee must be paid to the institution as a condition of enrollment or attendance. Scholarship or fellowship amounts used to pay these costs are taxable.

### Athletic Scholarships

An athletic scholarship is tax free if it meets the requirements discussed earlier.

**Worksheet 1-1.** You can use the worksheet below to figure the tax-free and taxable parts of your scholarship or fellowship.

#### Worksheet 1-1. Taxable Scholarship and Fellowship Income

Keep for Your Records



1. Enter your scholarship or fellowship income for 2010 . . . . .	1. _____
<ul style="list-style-type: none"> <li>• If you are a degree candidate at an eligible educational institution, go to line 2.</li> <li>• If you are <b>not</b> a degree candidate at an eligible educational institution, <b>stop here</b>. The entire amount is <b>taxable</b>. For information on how to report this amount on your tax return, see <a href="#">Reporting Scholarships and Fellowships</a> later in this chapter.</li> </ul>	
2. Enter the amount from line 1 that was for teaching, research, or any other services. (Do not include amounts received for these items under the National Health Service Corps Scholarship Program or the Armed Forces Health Professions Scholarship and Financial Assistance Program.) . . . . .	2. _____
3. Subtract line 2 from line 1 . . . . .	3. _____
4. Enter the amount from line 3 that your scholarship or fellowship <b>required</b> you to use for other than qualified education expenses . . . . .	4. _____
5. Subtract line 4 from line 3 . . . . .	5. _____
6. Enter the amount from line 5 that was used for qualified education expenses required for study at an eligible educational institution. This amount is the <b>tax-free part</b> of your scholarship or fellowship income* . . . . .	6. _____
7. Subtract line 6 from line 5 . . . . .	7. _____
8. <b>Taxable part.</b> Add lines 2, 4, and 7. See <a href="#">Reporting Scholarships and Fellowships</a> for how to report this amount on your tax return . . . . .	8. _____

\* If you qualify for other education benefits (see chapters 2 through 12), you may have to reduce the amount of education expenses qualifying for a specific benefit by the tax-free amount on this line.

## Taxable Scholarships and Fellowships

If your scholarship or fellowship does not meet the requirements described earlier, it is taxable. The following amounts received may be taxable.

- Amounts used to pay expenses that do not qualify.
- Payments for services.
- Scholarship prizes.

Each type is discussed below.

**Amounts used to pay expenses that do not qualify.** A scholarship amount you use to pay any expense that does not qualify is taxable, even if the expense is a fee that you must pay to the institution as a condition of enrollment or attendance.

**Payment for services.** Generally, you must include in income the part of any scholarship, fellowship, or tuition reduction that represents payment for past, present, or future teaching, research, or other services. This applies even if all candidates for a degree must perform the services to receive the degree. (See below for exceptions.)

**Exceptions.** You do not have to include in income the part of any scholarship or fellowship that represents payment for teaching, research, or other services if you receive the amount under:

- The National Health Service Corps Scholarship Program, or
- The Armed Forces Health Professions Scholarship and Financial Assistance Program,

and you:

- Are a candidate for a degree at an eligible educational institution, and

- Use that part of the scholarship or fellowship to pay qualified education expenses.

**Example 1.** You received a scholarship of \$2,500. The scholarship was not received under either of the exceptions mentioned above. As a condition for receiving the scholarship, you must serve as a part-time teaching assistant. Of the \$2,500 scholarship, \$1,000 represents payment for teaching. The provider of your scholarship gives you a Form W-2 showing \$1,000 as income. You used all the money for qualified education expenses. Assuming that all other conditions are met, \$1,500 of your scholarship is tax free. The \$1,000 you received for teaching is taxable.

**Example 2.** You are a candidate for a degree at a medical school. You receive a scholarship (not under either of the exceptions mentioned above) for your medical education and training. The terms of your scholarship require you to perform future services. A substantial penalty applies if you do not comply. The entire amount of your grant is taxable as payment for services in the year it is received.

**Scholarship prizes.** If you win a scholarship as a prize in a contest, the scholarship is fully taxable unless you meet the requirements discussed earlier under [Tax-Free Scholarships and Fellowships](#).

## Reporting Scholarships and Fellowships

Whether you must report your scholarship or fellowship depends on whether you must file a return and whether any part of your scholarship or fellowship is taxable.

If your only income is a completely tax-free scholarship or fellowship, you do not have to file a tax return and no reporting is necessary. If all or part of your scholarship or fellowship is taxable and you are required to file a tax return, report the taxable amount as explained below. You must report the taxable amount whether or not you received a Form W-2. If you receive an incorrect Form W-2, ask the payer for a corrected one.

For information on whether you must file a return, see Publication 501, Exemptions, Standard Deduction, and Filing Information, or your income tax form instructions.

### How To Report

How you report any taxable scholarship or fellowship income depends on which return you file.

**Form 1040EZ.** If you file Form 1040EZ, include the taxable amount in the total on line 1. If the taxable amount was not reported on Form W-2, also enter "SCH" and the taxable amount in the space to the left of line 1.

**Form 1040A.** If you file Form 1040A, include the taxable amount in the total on line 7. If the taxable amount was not reported on Form W-2, also enter "SCH" and the taxable amount in the space to the left of line 7.

**Form 1040.** If you file Form 1040, include the taxable amount in the total on line 7. If the taxable amount was not reported on Form W-2, also enter "SCH" and the taxable amount on the dotted line next to line 7.

**Schedule SE (Form 1040).** To determine your net earnings from self-employment, include amounts you receive under a scholarship as pay for your services that are reported to you on Form 1099-MISC, Miscellaneous Income. If your net earnings are \$400 or more, you must pay self-employment tax. Use Schedule SE, Self-Employment Tax, to figure this tax.

**Form 1040NR.** If you file Form 1040NR, report the taxable amount on line 12. Generally, you must report the amount shown in box 2 of Form(s) 1042-S, Foreign Person's U.S. Source Income Subject to Withholding. See the Instructions for Form 1040NR for more information.

**Form 1040NR-EZ.** If you file Form 1040NR-EZ, report the taxable amount on line 5. Generally, you must report the amount shown in box 2 of Form(s) 1042-S. See the Instructions for Form 1040NR-EZ for more information.

## Other Types of Educational Assistance

The following discussions deal with common types of educational assistance other than scholarships and fellowships.

### Fulbright Grants

A Fulbright grant is generally treated as a scholarship or fellowship in figuring how much of the grant is tax free. Report only the taxable amount on your tax return. See [Reporting Scholarships and Fellowships](#) on this page.

### Pell Grants and Other Title IV Need-Based Education Grants

These need-based grants are treated as scholarships for purposes of determining their tax treatment. They are tax free to the extent used for qualified education expenses during the period for which a grant is awarded. Report only the taxable amount on your tax return. See [Reporting Scholarships and Fellowships](#) on this page.

### Payment to Service Academy Cadets

An appointment to a United States military academy is not a scholarship or fellowship. Payment you receive as a cadet or midshipman at an armed services academy is pay for personal services and will be reported to you in box 1 of Form W-2. Include this pay in your income in the year you receive it unless one of the exceptions, discussed earlier under [Payment for services](#), applies.

### Veterans' Benefits

Payments you receive for education, training, or subsistence under any law administered by the Department of Veterans Affairs (VA) are tax free. Do not include these payments as income on your federal tax return.

If you qualify for one or more of the education benefits discussed in chapters 2 through 12, you may have to reduce the amount of education expenses qualifying for a specific benefit by part or all of your VA payments. This applies only to the part of your VA payments that is required to be used for education expenses.



You may want to visit the Veteran's Administration website at [www.gibill.va.gov](http://www.gibill.va.gov) for specific information about the various VA benefits for education.

**Example.** You have returned to college and are receiving two education benefits under the latest GI Bill: (1) a \$1,534 monthly basic housing allowance (BAH) that is directly deposited to your checking account, and (2) \$3,840 paid directly to your college for tuition. Neither of these benefits is taxable and you do not report them on your tax return. You also want to claim an American opportunity credit on your return. You paid \$5,000 in qualified education expenses (explained in detail in [chapter 2](#)). To figure the amount of credit, you must first subtract the \$3,840 from your qualified education expenses because this payment under the GI Bill was required to be used for education expenses. You do **not** subtract any amount of the BAH because it was paid to you and its use was not restricted.

## Qualified Tuition Reduction

If you are allowed to study tuition free or for a reduced rate of tuition, you may not have to pay tax on this benefit. This is called a "tuition reduction." You do not have to include a qualified tuition reduction in your income.

A tuition reduction is qualified only if you receive it from, and use it at, an eligible educational institution. You do not have to use the tuition reduction at the eligible educational institution from which you received it. In other words, if you work for an eligible educational institution and the institution arranges for you to take courses at another eligible educational institution without paying any tuition, you may not have to include the value of the free courses in your income.

The rules for determining if a tuition reduction is qualified, and therefore tax free, are different if the education provided is below the graduate level or is graduate education.

You must include in your income any tuition reduction you receive that is payment for your services.

**Eligible educational institution.** An eligible educational institution is one that maintains a regular faculty and curriculum and normally has a regularly enrolled body of students in attendance at the place where it carries on its educational activities.

**Officers, owners, and highly compensated employees.** Qualified tuition reductions apply to officers, owners, or highly compensated employees only if benefits are available to employees on a nondiscriminatory basis. This means that the tuition reduction benefits must be available

on substantially the same basis to each member of a group of employees. The group must be defined under a reasonable classification set up by the employer. The classification must not discriminate in favor of owners, officers, or highly compensated employees.

## Education Below the Graduate Level

If you receive a tuition reduction for education below the graduate level (including primary, secondary, or high school), it is a qualified tuition reduction, and therefore tax free, only if your relationship to the educational institution providing the benefit is described below.

1. You are an employee of the eligible educational institution.
2. You were an employee of the eligible educational institution, but you retired or left on disability.
3. You are a widow or widower of an individual who died while an employee of the eligible educational institution or who retired or left on disability.
4. You are the dependent child or spouse of an individual described in (1) through (3), above.

**Child of deceased parents.** For purposes of the qualified tuition reduction, a child is a dependent child if the child is under age 25 and both parents have died.

**Child of divorced parents.** For purposes of the qualified tuition reduction, a dependent child of divorced parents is treated as the dependent of both parents.

## Graduate Education

A tuition reduction you receive for graduate education is qualified, and therefore tax free, if both of the following requirements are met.

- It is provided by an eligible educational institution.
- You are a graduate student who performs teaching or research activities for the educational institution.

You must include in income any other tuition reductions for graduate education that you receive.

## How To Report

Any tuition reduction that is taxable should be included as wages in box 1 of your Form W-2. Report the amount from Form W-2, box 1, on line 7 (Form 1040 or Form 1040A) or line 1 (Form 1040EZ).



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