Chair Correspondence 1996-1997

Bowling Green State University. Administrative Staff Council

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Notes

1. Colored Paper
2. Pencil
3. Colored Ink
4. Poor Photocopies
5. Highlighter
MEMORANDUM

TO: Bryan Benner, Interim Assistant Vice President for Human Resources
FROM: Joan C. Morgan, Chair of ASC
RE: Vacation Accrual for Full-Time Administrative Staff

The Personnel Welfare Committee of Administrative Staff Council has been asked to clarify the definition of full-time administrative staff. It appears that there may be a situation in the College of Musical Arts where the definition of full-time administrative staff in relation to vacation accrual needs to be clarified.

As stated on page 4 of the Administrative Staff Handbook, "A full-time administrative staff member is one who works 40 hours per week on a regular schedule and is employed at least nine months per year". It is the belief of ASC-PWC that this definition should be used in determining the amount of vacation accrual.

If you need any additional information or clarification, please feel free to contact me.

JCM/nm

cc: Duane Whitmire, Chair of ASC-PWC
July 1, 1996

MEMORANDUM

TO: Carl E. Peschel  
Director, Foundations

FROM: Joan C. Morgan, Chair  
Administrative Staff

RE: Administrative Staff Scholarship Recipients

The following two students are recipients of the 1996-97 Administrative Staff Scholarship. The dollar amounts are designated next to each student's name. These funds should be loaded in each of their Bursar's accounts.

1. Charles Steinbrick  
SS# 290-88-2637  
PID# P001193181  
Award $1,000  
Citizenship USA

2. Erin Ham  
SS# 284-88-8020  
PID# P000072559  
Award $500  
Citizenship USA

Please let me know if you have any questions regarding these awards.

cc: Penny Nemitz, Chair, ASC Scholarship Committee  
Duane Whitmire, Chair, Elect, ASC

JCM/mm
MEMORANDUM

TO: Joan Morgan  
FROM: Carl E. Peschel  
DATE: April 8, 1996  
SUBJ: Administrative Staff Sch ADM1-42

As an aid in determining the amount available for this scholarship for 1996-97, the following is a recap of activity for the period 7/1/94 to 6/30/95 and estimates for 1996-97.

Balance 7/1/94 $ 1561.73
Awards 1994-95 -1200.00
Investment Income 1476.48
Balance 6/30/95 $ 1838.21
Awards 1995-96 -1450.00
Investment Income 1995-96 Est. 1507.00
Balance 6/30/96 Estimated $ 1895.21

It is my recommendation that the awards for 1996-97 be $ 1500.00.

Should there be any questions, please advise.

jh
pc: Financial Aid

May 14, 1996
Steinbrick
Charles Steinbrick - Firelands 1100 - 4 SS (7) 290-68-2657
Erin - Education 5 SS - PO00072559
SS 584585520
To: TREASURER OF THE FOUNDATION
ALUMNI CENTER

PLEASE PREPARE
CHECK IN FAVOR OF BGSU

IN THE AMOUNT OF $1,500

FOR Charles Steinbrick SS#290-03-2637 PID# P001193121 Award $1,000 Fall Semester

Erin Hern SS#234-68-8020 PID# P000072559 Award $500 Fall Semester

AND CHARGE TO Admin Staff Scholarship ACCOUNT ADM1-42 PAID BY CHECK NO.

APPROVED FOR PAYMENT:

ADMINISTRATOR OF ACCOUNT DIRECTOR, FOUNDATION ACCOUNTS

PREPARE THIS TRIPlicate FORM AND MAIL WHITE AND CANARY COPIES TO ALUMNI CENTER. RETAIN PINK COPY. DO NOT REMOVE CARBONS.
MEMORANDUM

TO: Lester Barber, Executive Assistant to the President
    Bryan Benner, Interim, Director of Human Resources
    J. Christopher Dalton, Vice President, Planning and Budgeting
    Nancy Footer, General Counsel
    Peter M. Hutchinson, Associate Vice President for Academic Affairs
    Robert Martin, Vice President, Operations
    Charles Middleton, Vice President, Academic Affairs
    John C. Moore, Interim Vice President, University Relations
    Sidney Ribeau, President
    Edward Whipple, Vice President, Student Affairs

FROM: Joan C. Morgan, Chair Administrative Staff Council

RE: Issues Related to the Administrative Staff Compensation Plan

“Why are we (administrative staff) being singled out?”
“Salary caps discourage longevity/loyalty.”
“How can we believe anything they (the administration) say?”
“What does all this mean?”
“What about movement of the levels?”
“Why are the VP’s (and other selected administrative staff groups) being left out?”

These are a few of the direct quotations received from members of administrative staff after they read the memorandum dated June 24 from President Ribeau and the Vice Presidents. As you can see there is a great need to both define and communicate with administrative staff regarding the recent developments with the Administrative Staff Compensation Plan.

Because of this need the Executive Committee of ASC, in the spirit of “Building Community”, is extending an invitation to you to attend our next meeting at noon on July 22 in the Library Conference Room. Should you be able to attend, please feel free to bring your lunch.
At this meeting we would like to discuss the following issues.

1. A definition of salary maximums or caps. Two questions related to this that need to be answered include:
   
   a. If salary maximums are adopted, can current employees be grandfathered?
   
   b. Will across the board raises be automatic for all administrative staff including those who have reached their maximums?

2. Will the Grade/Salary chart be adjusted on an annual basis?

3. What criteria will be used to move employees through the salary levels?

Discussing these issues is important, and as we move toward resolution it is essential that we communicate developments with our constituents.

For your information, I have attached three points from the document you received earlier this year entitled “Draft of Administrative Staff Council Response to 10-12-95 Document from the Vice Presidents.” These three points, 17, 10 and 9, relate to the issues we would like to discuss on the 22nd. We look forward to meeting with you at noon on July 22.

cc: ASC Executive Committee
Attachment

Points 17, 10 and 9 from Draft Document

The first statement in each point was made by the Vice Presidents and is followed by the response from Administrative Staff Council.

17. The Administrative Staff Compensation Plan/Salary Chart will be reviewed at least every five years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer, Inc. and adjustments made as results dictate in minimum, mid range and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.

ASC Response: We believe that administrative staff should not be penalized by a review of the Grade/Salary chart every five years instead of an annual review. We believe that the Grade/Salary chart should be adjusted each year that there is a general salary increase. This is necessary so that administrative salary levels are raised in an amount equivalent to the other constituent groups' increases each year.

10. An individual's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustee.

ASC Response - We agree

9. No current employee's salary will be capped as a result of the Compensation Study.

ASC Response - Not only should no current employee's salary be capped, it is our recommendation that no future administrative staff employee's salary should be capped.

JCM/nm
MEMORANDUM

TO: President Ribeau
   Vice Presidents: Christopher Dalton, Robert Martin, Chuck Middleton, John Moore, Ed Whipple
   Les Barber
   Nancy Footer

FROM: Joan C. Morgan, Chair, Administrative Staff Council

With the reopening of discussion on the policy issue of maximum salary levels for administrative staff, it must be made clear that Administrative Staff Council (ASC) is vehemently opposed to salary maximums. In addition to being the only constituent group on campus for which salary maximums are a possibility, there are number of related issues that must be dealt with before any decision is made about the adoption of such a policy. As discussions on this issue start we should all be aware that several issues related to maximum salaries have already been addressed in the document all of you received entitled “Draft of Administrative Staff Council Response to 10-12-95 Document from the Vice Presidents”.

Points 9, 10, and 17 in this document deal with issues related to salary maximums and will be reiterated here. The first remark in each point was made by the Vice Presidents. The second part is ASC’s response to the Vice Presidents’ proposal.

9. No current employee’s salary will be capped as a result of the Compensation Study.

ASC Response - Not only should no current employee’s salary be capped, it is our recommendation that no future administrative staff employee’s salary should be capped.
10. An individual's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustees.

ASC Response - We agree

17. The Administrative Staff Compensation Plan/Salary Chart will be reviewed at least every five years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer, Inc. and adjustments made as results dictate in minimum, mid range and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.

ASC Response: We believe that administrative staff should not be penalized by a review of the Grade/Salary chart every five years instead of an annual review. We believe that the Grade/Salary chart should be adjusted each year that there is a general salary increase. This is necessary so that administrative salary levels are raised in an amount equivalent to the other constituent groups' increases each year.

Should maximum salaries become a reality, recommendation number 17 recommends that the Administrative Staff Salary chart be reviewed only every five years. This would place administrative staff in an unfair position as our salaries would be the static and not rise annually at same rate as faculty and classified staff. In addition the Vice Presidents proposed that adjustments to administrative staff pay charts not be made automatically based on annual Board of Trustees approved pay increases. Such a proposal discriminates against administrative staff.

In addition to the points made in the "Draft" document a memorandum sent by John C. Moore to Deans and Directors in October, 1995 indicated that the University would make two recommendations to the Board of Trustees at their January, 1996 meeting. One of these recommendations was the following: "All current Administrative Staff employees whose present base falls near or above the maximum salary for the proposed grade level for their position will continue to receive annual increases in salary in the same manner as other administrative staff members."

The issue of caps for current employees appeared to be one that the University was in favor of adopting in October of 1995. (A copy of this memorandum is attached for your review) Reopening discussion of caps is causing a great deal of concern among a majority of administrative staff members.
The second issue in which we have an interest is the issue of progression through a salary level which is more commonly referred to as the penetration issue. Although no comments were received from the Vice Presidents regarding this issue, Administrative Staff stated in point 19 of the “Draft” document that this issue is under review by Administrative Staff Council’s Salary Committee and Personnel Welfare Committee in consultation with Personnel Services. As this issue is studied by both the University and Administrative Staff, it is important that a fair and equitable method be devised for current administrative staff to receive equitable pay for the amount of service they have at the University.

Discussion on both of these issues, caps and penetration, should continue throughout the summer. We look forward to working with you as we move towards resolution of these issues.
MEMORANDUM

TO: Dean and Directors
FROM: John C. Moore
DATE: October 3, 1995

The Vice Presidents are proposing a series of news releases on questions asked by Administrative Staff that need a reply. The first statement in the series will read:

1. The University will recommend to the Board of Trustees at their January 1996 meeting the following:
   a. All current Administrative Staff employees whose present base salary falls below the minimum salary for the proposed grade level assigned to their position will have their salary adjusted to the minimum for their grade level effective January 1, 1996.
   b. All current Administrative Staff employees whose present base salary falls near or above the maximum salary for the proposed grade level for their position will continue to receive annual increases in salary in the same manner as other administrative staff members.

This will appear in the next issue of the MONITOR with a special report in the BG News. Please pass this on to your staff as soon as possible.

JCM:mb
July 26, 1996

MEMORANDUM

TO: Sidney Ribeau, President
    Lester Barber, Executive Assistant to the President
    Bryan Benner, Interim Director of Human Resources
    J. Christopher Dalton, Vice President, Planning and Budgeting
    Nancy Footer, General Counsel
    Peter M. Hutchinson, Associate Vice President for Academic Affairs
    Charles Middleton, Vice President, Academic Affairs
    John C. Moore, Interim Vice President, University Relations
    Edward Whipple, Vice President, Student Affairs

FROM: Joan C. Morgan, Chair, Administrative Staff Council

RE: July 22 meeting

The Executive Committee of Administrative Staff Council was glad that so many of you were able to join us on July 22. We felt the meeting was productive since it became clear that we are struggling with many of the same issues as you are. We agree with the premise that maximum salaries cannot be dealt with until decisions related to the movement of pay ranges are made. It is clear that as the salary table moves, so will the minimums and maximums. One issue related to movement of pay ranges concerns the current table which many of us received in the fall of 1995. Movement of this table did not occur when raises were distributed for 1996-97 and should occur before initial implementation of the compensation plan. With such an adjustment, some administrative staff members currently at or above the maximum of their salary range would no longer be at the maximum. Conversely, those staff below the minimum of their salary range would receive a larger adjustment in their salary. Once the many issues related to salary ranges are resolved, the issue of maximum salaries must be revisited. There are many ways to deal with this issue, but Administrative Staff Council recommends that any decision to red line staff be used only as a last resort. The option of adding bonuses which would not be added to the salary base needs to be studied. Two other options to consider are to offer an Early Retirement buyout to those administrative staff who are currently at their maximum and to move the salary chart to reflect the most recent salary increase. In addition to the issues of movement of the salary table and salary maximums is that of movement of individuals within the salary grades. What criteria should be used? Longevity of service is certainly a factor that needs to be considered, and, because of the unevenness of performance evaluations across campus, may be the only factor that can be used for current employees. As the process for performance assessment is developed and implemented, the quality of an individual's performance also needs to be taken into consideration.
Again, we appreciate your interest in discussing the Administrative Staff Compensation Plan with us. There are still many unresolved issues, and those discussed on July 22 need to be resolved before the end of September. As your discussions continue, I look forward to being updated so we can keep our constituents informed of developments that will affect us all.
August 7, 1996

MEMORANDUM

TO: Lester Barber  
   Bryan Benner  
   J. Christopher Dalton  
   Nancy Footer  
   Peter Hutchinson  
   John Moore  
   Edward Whipple

FROM: Charles R. Middleton  
       Vice President

RE: Administrative Staff

I have read Joan Morgan's memo after our July 22 meeting with the Executive Committee of Administrative Staff Council with great interest. Through the rest of the Mercer process I think that we need to look at least at the following considerations.

1) The salary scales should be adjusted to reflect the current year's (1996-97) anticipated salary ranges. My understanding after our meeting with Chuck Schanie is that we will get these data soon.

2) We need to think in terms of career development opportunities as a way to address the issue of long term employees running up against range maximums. In short, we ought to be looking at how people who have been in rank a long time move along to other ranks and other opportunities at the University.

3) Annual evaluations of administrative staff ought not to be an option. They should be required. We need to develop a form very quickly so that we can see to it that the evaluation itself is designed to address such matters as career development, job performance, etc.

Furthermore, supervisors who are themselves administrative staff should be held accountable for conducting these evaluations. These evaluations, in my judgment, should be reviewed by the supervisors of the supervisors. They should be used as part of the annual evaluation of supervisory personnel with regard to their effectiveness in their positions.
When supervisors are faculty members, the Deans and I will develop a process whereby faculty administrators can be held accountable for conducting these reviews.

At our next meeting on Mercer, when we have a full attendance, I propose that we discuss these issues and devise a strategy for implementing those that we all agree are important.

skg

xc:  President Ribeau
    Joan C. Morgan, Chair, Administrative Staff Council
    Deans’ Council
MEMORANDUM

TO:        Dr. Charles R. Middleton, Vice President for Academic Affairs
FROM:     Joan C. Morgan, Chair, Administrative Staff Council
RE:      Administrative Staff Fall Reception

Thank you so much for agreeing to participate in Administrative Staff's Fall Reception on September 11. It will be held in 101 Olscamp Hall from 3:00-5:00. As our first speaker, you are scheduled to make a few remarks at 3:45. You could include a welcome to the Fall Semester as well as a few remarks about the University's appreciation for the contributions of administrative staff. Also any comments or remarks you feel appropriate regarding the direction the University is moving in would also be appreciated. I was thinking that five minutes would be adequate, but if more time is needed that's fine. Following your remarks, a brief presentation will be given about ASC's committee structure, and the important work done by each standing committee. This will be followed by the announcement of the recipients of the Administrative Staff Scholarships. The last topic on the program will be the announcement of the Ferrari Award winner. I'm anticipating that the entire formal program should last about a half an hour. I hope you will be able to stay and enjoy our reception. Once again, thanks for agreeing to participate and please give me a call if you have any questions regarding our reception.

JCM/nm
MEMORANDUM

TO: Mr. Robert Martin, Vice President Operations
FROM: Joan C. Morgan, Chair
Administration Staff Council
RE: 1995-96 Annual Report

Attached you will find the 1995-96 Annual Report from Administrative Staff Council. Although some progress was made towards achieving our goals, much time was spent this year dealing with the many issues related to the Position Analysis and Compensation Study also known as the Mercer Study. In addition to this very time consuming effort there are several accomplishments that deserve special attention.

1. A committee composed of administrative staff, under the very capable leadership of Judy Donald, made substantial progress in developing a performance appraisal process.

2. Two scholarships totaling $1500 have been awarded to two BGSU undergraduate students.

3. The BG EFFECT program was reinstated this spring.

4. A number of administrative staff members continued to participate in the Professional Development Institute.

1995-96 was a very difficult year for many administrative staff members because of the Position Analysis and Compensation Study. As the many issues related to this compensation plan are resolved, issues related to salary equity for administrative staff will also be resolved.

JCM/nm
attachment
ADMINISTRATIVE STAFF COUNCIL 1995-96 GOALS

Administrative staff members at Bowling Green State University are responsible for promoting a healthy climate for learning as well as professional growth and asserting both the leadership and support essential to enhancing the University's programs and services. Effective administration promotes an institutional reputation of academic and professional excellence as well as the sound management of institutional resources.

The following goals are supportive of this mission of the Administrative Staff Council at Bowling Green State University.

1. TO CONTINUE TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF CONCERNING THE POSITION ANALYSIS AND COMPENSATION STUDY

   • Provide support for administrative staff concerning the position analysis and compensation study.

   Goal accomplished.

   • Pursue the articulation and implementation of clearly defined policies/ procedures for dealing with wage related issues such as market adjustments, promotions, equity adjustments, and gender inequities.

   Some progress made.

   • Address the issues related to increased workloads. Such issues include but are not limited to the development of interim/acting appointment pay scales and the feasibility of using alternate means of compensation or recognition.

   Some progress made.
2. TO PARTICIPATE IN THE DEVELOPMENT OF A PERFORMANCE EVALUATION PROCEDURE WHICH PROVIDE AN EQUITABLE ASSESSMENT OF PERFORMANCE FOR ALL ADMINISTRATIVE STAFF MEMBERS

- Develop both merit and across the board salary guidelines and procedures.

**Substantial progress made.**

- Advocate for professional development programs designed for supervisors of administrative staff members. These programs should deal with the many personnel issues related to evaluation of job performance.

**Little progress made.**

3. CONTINUE TO OFFER AND EXPAND EXISTING ADMINISTRATIVE STAFF PROGRAMS THAT WILL ENHANCE OPPORTUNITIES FOR BOWLING GREEN STATE UNIVERSITY STUDENTS

- Increase the corpus of the Administrative Staff Scholarship to $40,000.

**The corpus was increased to $37,618.15.**

- Continue to offer the administrative staff mentoring program Bowling Green EFFECT for new students entering the University.

**Goal accomplished.**

- Develop a student co-op program where students work with administrative staff on a for credit basis.

**No progress made.**
4. TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF MEMBERS AND THEIR CONCERNS AND NEEDS RELATED TO THE UNIVERSITY’S HEALTH BENEFIT PLANS

• Seek to reestablish the University Health insurance committee with representation from all constituent groups on campus.

   No progress made.

• Participate in and promote the development of Wellness programs for all university employees.

   Some progress made.

• Seek to establish a BGSU Health Consumers group to study and advise in the development of health products.

   No progress made.

5. TO CONTINUE TO BE AN ADVOCATE FOR AND TO OFFER PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR ADMINISTRATIVE STAFF

• Seek to establish a paid leave of absence policy for administrative staff.

   No progress made.

• Seek to reestablish an ASC professional development fund. The goal for this fund is a total of $10,000.

   Little progress made.

• Continue to participate in the Professional Development Institute.

   Goal accomplished.
• Continue to collaborate with existing programs and offices that develop and offer professional development programs for university employees.

  Goal accomplished.

6. **SECURE AN OVERALL SALARY AND BENEFITS PACKAGE THAT RANKS BGSU’S ADMINISTRATIVE STAFF IN THE FOURTH POSITION AMONG PUBLIC UNIVERSITIES IN THE STATE OF OHIO.**

  Little progress made.

7. **CONTINUE TO DEVELOP AND IMPROVE COMMUNICATIONS AND PUBLIC RELATIONS AMONG ADMINISTRATIVE STAFF**

• Continue the development of network capabilities.

  Some progress made.

• Develop a public relations brochure for Administrative Staff Council.

  Goal accomplished.

• Continue to distribute e-mail updates to administrative staff.

  Goal accomplished.

• Development of a list serve to send minutes from Administrative Staff Council meetings to all administrative staff members.

  Some progress made.
8. CONTINUE TO COLLABORATE WITH BOTH THE FACULTY SENATE AND CLASSIFIED STAFF COUNCIL ON ISSUES OF COMMON CONCERN

• The establishment of a day care policy committee.

  Some progress made.

• Personnel Welfare Committee chairs from each constituent group will meet regularly regarding the benefit issues.

  Little progress made.

• Advocate the implementation of an early retirement program for administrative and classified staff. Advocate the continuation of the early retirement program for faculty.

  Progress made.

• Collaborate with faculty Senate and Classified Staff Council in the development of the University community's strategic planning process.

  Progress made.
MEMORANDUM

TO: Les Barber, Executive Assistant to the President
FROM: Joan Morgan, Chair, Administrative Staff Council

ASC Executive Committee met August 29, 1996 to discuss the sixth draft of the "Administrative Staff Compensation Plan: Recommendations on Some Outstanding Policy Issues" and have recommendations related to the following points: 4 and 10. Before making these recommendations, ASC Exec wants to emphasize that we are encouraged by some of the changes that have been made in proposed policies that are going to be recommended to the board. For example, more frequent movement of the salary levels than originally proposed as well as time-adjustment of the salary table will lessen the impact of the implementation of salary caps. ASC Executive Committee wants to go on record as recommending that the implementation of the Salary Compensation plan is done in a humane way and that all administrative staff be treated humanely as the implementation moves along.

ASC Executive Committee Recommendations

Point 4. An administrative staff member who is promoted to a different position in a higher grade should be guaranteed at least an 8% increase in salary or the minimum salary for the new grade, whichever is higher. A precedent for this percentage raise has already been established with classified staff. When a classified staff member moves into another position that is at a higher classification, a 4% increase occurs during the probationary period, and an additional 4% increase is added to their salary after the probationary period is successfully completed. Administrative staff should receive the same benefit as classified staff when promotions occur.

Another issue related to this point concerns administrative staff who are successful in the competition for positions on campus that are at a higher salary level. As on campus applicant for such a position, they should be given the same salary as an off campus candidate with the same qualifications.

10. Although ASC Executive Committee understands the University's position on salary maximums and is appreciative of the proposed three year exemption period for personnel at the maximum of their salary grade, the committee is opposed to caps for administrative staff. Across the board or cost of living adjustments should be added to the base salary of administrative staff who are at their maximums. In addition, administrative staff at their maximums who are meritorious must receive some financial reward for their service.

We do appreciate the opportunity you gave us for input into proposed policies for the Salary Compensation Plan. I will be happy to answer any questions you may have about our concerns.
Administrative Staff Compensation Plan: Recommendations on Some Outstanding Policy Issues

At and following its meeting on August 27, 1996 the "Council of Vice Presidents" or "Mercer Group" further refined the following policy statements.

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
   (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
   (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.

2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.

3. In the event that a higher grade placement for an administrative staff member results from a new position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to
his/her level in the original one.

7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual’s salary will not be adjusted.

8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.

9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.

10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member’s salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.
August 30, 1996

MEMORANDUM

TO: Les Barber, Executive Assistant to the President

FROM: Joan C. Morgan, Director Academic Enhancement

RE: Reopening of Appeals Process for Administration Staff

As chair of Administrative Staff Council I would like to request that the appeals process for administrative staff who are at the maximum or in the fourth quarter of their salary level be reopened. Many of these people were led to believe that there would be no caps for current employees and therefore did not appeal their ranking. Since the decision has been made to impose salary maximums, these staff members should be permitted to appeal. Thank you for your consideration of this request.

JCM/nm

pc: Duane Whitmire
    Bryan Benner
September 11, 1996

MEMORANDUM

TO: Joan C. Morgan, Chair
Administrative Staff Council
c/o Academic Enhancement

FROM: Lester E. Barber
Executive Assistant to the President

RE: Reopening of Appeals Process for Administrative Staff

I am responding on behalf of President Ribeau and the Vice Presidents' Council to your memorandum of August 30, 1996 concerning one aspect of the proposed administrative staff compensation plan. In our view, there is real merit in your proposal that an additional opportunity to appeal their grade levels should be extended to those staff members whose salaries are above or near the maximums for grade. Therefore, here is what we plan to do.

1.) If the Board of Trustees approves the compensation plan on September 13th, we will reopen the appeals process to those administrative staff whose 1996-97 salaries are above the maximums and to those whose salaries are within the top 10% of the salary range for their grades. We have chosen the top 10% rather than the top 25% which you proposed because of an internal analysis we have done of the rate at which individuals' salaries are likely to move through their ranges.

Assuming that the ranges move upward annually at 1% less than the average salary increase, our study shows that a staff member in grade 7 whose initial "penetration" point in terms of salary is 90% of range will not reach the grade maximum for five years. It will also take at least five years for such a person in grade 14 to reach maximum; and it will take six years for such a person in grade 22.

In other words, it is our belief that it will take longer than six years to reach maximum for anyone whose 1996-97 salary is at an initial "penetration" point lower than 10% from the top of the range. Before such individuals could reach their maximums there will be two opportunities to evaluate the ranges and adjust them for market. (The policy proposal calls for a full review in every third year.) For this reason, it is our view that we do not need to reopen the appeals process for anyone whose salary is lower than 10% from the top of the range.
2.) The reopened appeals process will be conducted in a manner as close as possible to the original one. As long as the original ASC Review Committee remains intact, it will have the same function as before. The process itself will be the same, culminating in review and decision by the Vice Presidents' Council.

Note of Explanation: In conducting its review of the original set of appeals, the Vice Presidents' Council rather quickly reached the point of being able to interpret and apply the six William Mercer, Inc. job factor descriptions in a consistent, equitable way. To maximize consistency and equity, the Council examined all job factors of those individuals who appealed, not just the specific factors which were appealed; and, in some cases, it made changes to those factors. In no instance, however, was a grade lowered as a result of such changes. In addition, in cases where there were other individuals in the same or closely similar positions, the Council extended the same factor changes, as a matter of equity, to the other individuals as well. The Council will use the same procedure for the appeals which result from this new reopening opportunity.

An Additional Note of Clarification: In the original review, most factor changes to individuals not submitting an appeal did not result in a grade change, but in a few instances they did. However, those instances always resulted in the raising of a grade, not in lowering one. For your information, three positions where a grade increase resulted for the members of a whole group were: physicians, residence hall directors and clinical supervisors in audiology.

XC: President Ribeau
    Members, Vice Presidents' Council
    Duane Whitmire
Good morning, Chairman Medlin, President Ribeau and members of the Board.

Administrative Staff had their opening fall reception on Sept. 11. At that reception the recipient of the Ferrari Award was announced—Jill Carr, Associate Dean of Students for Judicial Affairs—a very deserving recipient. Also the names of the two students who were awarded administrative staff scholarships were announced, Adam Steinbrick and Erin Hern. Outstanding students, both were at the reception to be introduced and said a few words about how much this scholarship meant to them.

Executive Council met throughout the summer to discuss developments with the Salary Compensation Plan. Several meetings with representatives of the administration occurred as the details of what has come to be called Mercer were discussed. At yesterday’s meeting, Dean and I had the opportunity to raise concerns of administrative staff regarding the policies that will be used in the implementation of phase I of the Salary Compensation Plan. These issues concern salary caps as well as salary increases for promotions, interim appointments and positions with a revised position analysis. As these issues were discussed it was made clear that the policies adopted today are not etched in stone. These should be discussed and revised if appropriate as we work through this process. I do want to emphasize that salary maximum for administrative staff continues to be of great concern. It was pointed out that point 8 in the policy document does give administrative staff who are at the maximum salary in their salary level the opportunity to have a special market premium established. However, even with this stipulation, I am very concerned that the only group on campus with salary maximums is administrative staff.

The salary compensation plan continues to be a topic of much concern. As we move the process I hope that you continue to be concerned about the humane treatment of administrative staff at the University. Thank you.
THURSDAY, 8/29/96
SIXTH DRAFT

Administrative Staff Compensation Plan: Recommendations on
Some Outstanding Policy Issues

At and following its meeting on August 27, 1996 the "Council of Vice Presidents" or
"Mercer Group" further refined the following policy statements.

1. Administrative staff members whose salaries are below minimum for grade will
have their salaries brought up to minimum. The process by which that will be done is
as follows.
   (a) 1995-96 salaries for all individuals below the minimum for grade, based on
the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from
January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved
upward, based on the adjusted '95-96 salary.
   (b) A second salary table, time-adjusted for 1996-97, has now been constructed,
based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are
still below minimum for grade on this new table will be brought up to the grade
minimum, retroactive from July 1, 1996.

2. In general, Position Request and Authorization forms for administrative staff new
hires will specify salaries with a range from the grade minimum to the midpoint.
Listing a salary level higher than the midpoint for grade will require prior approval by
the area vice president, after consultation with the offices of Human Resources and
Affirmative Action.

3. In the event that a higher grade placement for an administrative staff member
results from a (new position) analysis, that person is guaranteed at least a 5% increase
in salary OR the minimum salary for the new grade, whichever is greater. 10%

4. If an administrative staff member is promoted to a different position in a higher
grade, that person is guaranteed at least a 5% increase in salary OR the minimum
salary for the new grade, whichever is greater.

5. When an administrative staff member is assigned to a position in a higher grade on
an interim/temporary/acting basis, the following salary adjustment policy will apply.
If the person's service in the new position is longer than 30 calendar days, s/he will
receive a premium for the time served equal to at least a 5% increase in salary OR the
minimum salary for the new grade, whichever is greater. 10%.

In cases where an administrative staff member is demoted to a position in a lower
grade, the person's salary will be lowered to a level in the new grade equivalent to...
his/her level in the original one.

7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.

8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.

9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.

10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.
September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS

FROM: Sidney A. Ribeau, President

RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutary effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.
2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of all employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

Attachment
1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.

(a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.

(b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.

2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.

3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.

6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to his/her level in the original one.

7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.

8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.

9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.

10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.

Approved by the Board of Trustees
September 13, 1996
MEMORANDUM

TO: Harold L. Lunde, Chair
Faculty Senate

FROM: Joan C. Morgan, Chair
Administrative Staff Council
Patricia Kitchen, Chair
Classified Staff Council

RE: Resolution Concerning Procedures for Recruiting Faculty

The recent Faculty Senate resolution concerning procedures for recruiting faculty voted upon at the September Faculty Senate meeting is of great concern to the leadership of both Administrative Staff Council and Classified Staff Council. The exclusionary nature of the charter language sends a negative message to all non-faculty on campus. The amendment that came before faculty senate that would “allow” participation on screening committees of non-faculty would have been a very positive step toward community building and an acknowledgment that non-faculty have positive contributions to make in the recruitment of faculty. Allowing the faculty of an academic unit to vote on the composition of a faculty screening committee seems to give appropriate freedom to each unit to best use the talents of all individuals in that unit. To specifically and deliberately exclude non-faculty from faculty search committees is a decision that contributes to the destruction of the building community efforts that have been underway for the past year. Ostracism of non-faculty groups from faculty selection committees sends a negative message to all units on campus, but especially to those units that have traditionally involved non-faculty members in their faculty searches. Two examples of such units are the University Library and Firelands.

We would appreciate it if the Faculty Senate would reconsider this resolution taking into consideration this input from Administrative Staff and Classified Staff. We will be happy to answer any questions you may have about our concerns.
RESOLUTION
CONCERNING
PROCEDURES FOR RECRUITING FACULTY

WHEREAS, the Director of the School of Art, upon the advice of the
Director of Affirmative Action and the Office of the Dean of the College of Arts &
Sciences, appointed nonfaculty members to a faculty selection committee
resulting in a charter violation charge being filed;
WHEREAS, on January 6, and February 27, 1996, the SEC determined a
charter violation did occur, but requested the Amendments and ByLaws
Committee to draft an amendment permitting nonfaculty members to serve on
faculty search committees if the academic unit so desires; and
WHEREAS, the Academic Charter at XI-A allows departments to have
student members on its committees.

THEREFORE, BE IT RESOLVED THAT B-I-B-2 of the Academic Charter
be amended to conform to XI-A, thereby eliminating any potential conflict:

2. The credentials of candidates shall be secured by the academic
unit(s) and shall be reviewed by the faculty and Chair or Director
of that unit(s). X.D.3 and X.L.C.5 The faculty members of the
academic unit(s) shall constitute a screening committee. NON-
FACULTY MEMBERS MAY BE ADDED TO THE SCREENING
COMMITTEE BY A MAJORITY VOTE OF THE FACULTY MEMBERS
OF THE ACADEMIC UNIT(S). THE SCREENING COMMITTEE'S
whose judgement on candidates shall be included in the formal
recommendations that the academic unit(s), through the Chair or
Director, makes to the appropriate Dean (or Deans). The Chair or
Director shall also render an opinion. If the opinion of the
Chair/Director differs from the opinion of the faculty, the Chair or
Director shall indicate the exact reasons for the differing opinion.

Unanimously approved on 4-12-96
by CAB
Approved by Senate Executive Committee 9/3/96
October 2, 1996

Joan Morgan, Chair  
Administrative Staff Council  
BGSU

Dear Joan,

On behalf of the many people who contributed to the memorial for Julie Kane, I wanted to extend my sincerest appreciation for your help and willingness to get involved. Though in response to a terrible tragedy, this memorial celebration offered a tremendous opportunity for multiple constituencies in Bowling Green to come together and mourn a shared loss. Further, it communicated an important message regarding an abhorrence of and zero-tolerance for violence.

As a relatively new member to this community, I was moved by the generosity and support offered in support of this initiative. Again, please accept my sincerest thanks.

Yours sincerely,

[Signature]

Janet K. Morrison  
Graduate Student Senate  
Bowling Green State University

JKM/bll

cc: Dr. Sidney Ribeau, President, BGSU
MEMORANDUM

TO: Joan Morgan
FROM: Donna Wittwer
Manager, Benefits
DATE: October 8, 1996
RE: Information

Hi Joan, the attached information may help in clarifying how the Health, Wellness and Insurance committee came to exist.

The first memorandum is dated November 29, 1994 and is the listing of the old insurance committee members. Some of these members also participated on the health care task force. I can't be sure, but I think when the new committee was being formed in January of this year, the list was used to get started with the people whose term had not expired.

The next packet of information is from Stephen Skomp with the date of January 19, 1996. In the back of this packet is the memo to Dr. Olscamp from Don Boren, chair of the Health Care Task force, with the recommendations of creating a new committee with equal representation. At the beginning of this packet is the memo from Dr. Ribeau dated January 9, 1996 to the chair of the Committee on Committees supporting the change in composition and charge and asking Com Com to initiate the process.

The last piece of information is the function and purpose of the committee as approved by committee on committees.

The committee began to meet in January with bimonthly meetings until with the last meeting on May 23, 1996. During those months, much time was spent on educating and reviewing with the committee on the following:
- the BGSU different plan options
- administrative problems with the plan designs
- the funding mechanism of prescription drugs
- information from the prescription vendor regarding network pharmacy and mail order opportunities
- wellness by Dr. Horowitz
- quality opportunities by an employers coalition
- our top major diagnostic areas in regard to claims experience and wellness opportunities such as disease management
- communication

If you need more information, please let me know. The next meeting is scheduled for October 16.

cc: B. Benner
MEMORANDUM

TO:    Mark Bennion, Chair
       Health, Wellness and Insurance Committee

FROM:  Joan C. Morgan, Chair
       Administrative Staff Council

RE:    Health, Wellness and Insurance Committee

In reviewing the 1995-96 goals of Administrative Staff Council one of our goals was to be an advocate for all administrative staff members and their concerns and needs related to health benefits, wellness programs and insurance needs. During 1995-96 wellness programs seemed to receive little allocation from this standing committee and much concern about this was expressed at the October Administrative Staff Council (ASC) meeting.

As ASC continues to be an advocate for administrative staff in the important areas dealt with by your committee we look forward to learning of the plans of the Health, Wellness and Insurance Committee for 1996-97. If you have any questions about our concerns do not hesitate to contact me.

JCM/nm

be: Donna Wettles
   Joanne Wright
MEMORANDUM

TO: Charles R. Middleton
    Provost and Vice President

FROM: Joan C. Morgan, Chair
      Administrative Staff Council

RE: Human Resources Director

October 9, 1996

I was glad to hear that a search is being initiated for a new director of Human Resources. Below you will find the names of four administrative staff members one or two of whom you will select to serve on the search committee. I have spoken with each person and, although they understand they may not be selected, they all indicated an interest in serving on this very important committee.

Pat Fitzgerald
Pat Green
Joyce Kepke
Duane Whitmire

I would appreciate it if you would let me know the name(s) of the administrative staff selected to serve on this search committee.

JCM/nm
MEMORANDUM

TO: Joan Morgan, Chair
Administrative Staff Council

FROM: Dave Crooks, Director
Student Union

RE: Student Union Feasibility Study

October 30, 1996

The Student Union Feasibility Study Steering Committee has awarded a contract to the architectural firm WTW (Williams, Trebilcock, Whitehead). WTW has asked that we gather a Project Advisory Committee which would include representatives from student organizations, Student Affairs, staff constituent organizations, and certain other representatives from the campus community.

We are asking you to either serve on this Project Advisory Committee or appoint a representative from your organization to do so. Please call Tina at the Student Union (2-2213) to indicate who the representative will be as quickly as possible because the first meeting with WTW will occur in mid-November.

We sincerely hope your participation in the Union feasibility study process will be as rewarding and meaningful as possible. We look forward to working with you during this process.

[Signature]

[Note]

[Handwritten note on dated 11/4/96.]

Recommends that [Name] (student) serve as ASC's representative.
October 31, 1996

Memorandum

To: Dr. Sidney Ribeau, President

From: Joan C. Morgan, Chair, Administrative Staff Council

Re: Continuing Concerns About the Salary Compensation Plan

Thank you for your memorandum of September 13, 1996, to the BGSU Administrative Staff. We appreciate the willingness of the administration to view the acceptance of the compensation plan as a broad plan that may require "fine tuning" and that the plan is not "cast in stone". As discussed during the process of developing the compensation plan, the acceptance of the plan is only the first phase in our journey to an equitable system. The Administrative Staff Council (ASC) is already beginning to discuss the "fine tuning" to which you alluded.

To that end ASC will be monitoring the impact of the compensation plan. For instance, we have already received anecdotal information on the beneficial impact regarding starting salaries for replacements for personnel who have left the university. We believe, however, that we will need more than anecdotal information to study the impact of the entire Salary Compensation Plan on administrative staff. We will need to obtain this information from the university in order to start such a study, and we hope you will support the provision of this information by the Office of Human Resources.

This academic year, ASC will begin to develop a data base from which we can produce accurate information for use in our proposals to fine tune the plan. In the course of developing such a data base, several pieces of information need to be supplied to ASC by the Office of Human Resources. We will need the minimum and maximum salary of each level as set for the current fiscal year. In addition we will need the following:

1. a list of those individuals who are not employed under a full time faculty contract or employed as a classified staff member,

2. the identification of those individual's assigned salary levels and salaries for the current fiscal year reflecting all Salary Compensation Plan adjustments,

3. the date of hire in current position for each individual,
4. Identification of all positions which are exempted from the minimums or maximums,

5. 1995-1996 fiscal year salaries for all administrative staff.

This information will help us analyze the effect of the Salary Compensation Plan on administrative staff at the University. The preceding information should be readily available from Human Resources, and anything you can do to ensure that we obtain this information in a timely fashion will be appreciated. It would be most helpful if this information could be provided on an annual basis and at approximately the same time each year, perhaps at the beginning of the fall semester. We will appreciate your assistance in helping us to secure this information.

Administrative Staff Council hopes to continue our positive and constructive relationship with the administration. If you have any questions about this request, please let me know. I look forward to your response.

pc: Dr. Charles Middleton, Provost and Vice President for Academic Affairs
MEMORANDUM

TO: Dr. Charles Middleton, Provost and Vice President for Academic Affairs
FROM: Joan C. Morgan, Chair
Administrative Staff Council
RE: February 6, 1996, Administrative Staff Council Meeting

Chuck, thanks for agreeing to attend our February 6 Administrative Staff Council. The meeting starts at 1:30 in the Alumni Room in the Student Union. Typically approximately 50 representatives are in attendance. A half hour presentation would be appropriate and could include a brief discussion of the priorities of the University this year and next, and the important role administrative staff in helping the university move towards accomplishing these priorities. A few words about where we are in the Salary Compensation Plan and how administrative staff and the administration must work together in defining this plan would be appropriate. Your ideas about the importance of supervisor training related to performance evaluation should be shared. Any thoughts or insights you could provide on the future balance between merit and across the board salary increases would also be appropriate. Obviously any topics you feel appropriate could also be shared. Please give me a call if you have any questions about this meeting.

JCM/nm
MEMORANDUM

TO: Joan Morgan
Chair - Administrative Staff Council

FROM: Michael D. Walsh
Director of Admissions

DATE: November 6, 1996

SUBJECT: All Campus Image Committee

The University Marketing Group has been asked by Dr. Ribeau to put together a marketing strategy for BGSU. Dr. Ribeau asked that we receive input from all parts of the campus. We are putting together a University-wide committee called the All Campus Image Committee and are asking this committee to talk with their constituents and then provide the Marketing Group with a list of BGSU strengths and weaknesses. This committee will initially meet twice:

- On November 26th at 3:00 p.m. in the Assembly Room (McFall) at which time the committee’s overall charge and duties will be outlined.

- In late January/early February at which time the members will provide feedback and help prioritize their recommendations.

Later meetings will be held to report on the marketing approach the University is taking and to assess any changes that have occurred.

I am requesting that you appoint 2 members from your council or overall membership to this important committee. Please let me know by Monday, November 18, who your representatives will be. Also, please let your representatives know about our first meeting.

Thank you for your assistance.
November 7, 1996

MEMORANDUM

TO: Dr. Charles Middleton, Provost and Vice President for Academic Affairs

FROM: Joan C. Morgan, Chair
       Administrative Staff Council

RE: Administrative Staff Council 1996-97 Goals

Chuck, attached are the 1996-97 goals for Administrative Council. These were approved at the November 7 Administrative Staff Council meeting. Please let me know if you have any questions regarding these goals.

JCM/nm
ADMINISTRATIVE STAFF COUNCIL 1996-97 GOALS

Administrative staff members at Bowling Green State University are responsible for promoting a healthy climate for learning as well as professional growth and providing both the leadership and support essential to enhancing the University's programs and services. Effective administration promotes an institutional reputation of academic and professional excellence as well as the sound management of institutional resources.

The following goals are supportive of this mission of the Administrative Staff Council at Bowling Green State University.

1. TO CONTINUE TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF CONCERNING THE POSITION ANALYSIS AND COMPENSATION STUDY.
   - Provide support for administrative staff concerning the position analysis and compensation study.
   - Pursue the articulation and implementation of clearly defined policies/procedures for dealing with wage related issues such as market adjustments, promotions, equity adjustments, gender inequities, and moving through the salary levels associated with the Salary Compensation Plan.
   - Address issues related to increased workloads. Such issues include the feasibility of using alternate means of compensation or recognition.

2. TO CONTINUE TO PARTICIPATE IN THE DEVELOPMENT OF A PERFORMANCE EVALUATION PROCEDURE WHICH PROVIDES AN EQUITABLE ASSESSMENT OF PERFORMANCE FOR ALL ADMINISTRATIVE STAFF MEMBERS.
   - Continue to develop both merit and across the board salary guidelines and procedures.
   - Advocate for professional development programs designed for supervisors of administrative staff members. These programs should deal with the many personnel issues related to evaluation of job performance.
3. CONTINUE TO OFFER AND EXPAND EXISTING ADMINISTRATIVE STAFF PROGRAMS THAT WILL ENHANCE OPPORTUNITIES FOR BOWLING GREEN STATE UNIVERSITY STUDENTS.

- Increase the corpus of the Administrative Staff Scholarship to $40,000.

- Assess and continue to offer the administrative staff mentoring program Bowling Green EFFECT for new students entering the University.

4. TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF MEMBERS AND THEIR CONCERNS AND NEEDS RELATED TO THE UNIVERSITY'S HEALTH BENEFIT PLANS.

- Continue to have representation on the Health, Wellness and Insurance Committee of Faculty Senate.

- Participate in and promote the development of Wellness programs for all university employees.

5. TO CONTINUE TO BE AN ADVOCATE FOR AND TO OFFER PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR ADMINISTRATIVE STAFF.

- Seek to establish a paid leave of absence policy for administrative staff.

- Seek to reestablish an ASC professional development fund. The goal for this fund is a total of $10,000.

- Continue to participate in the Professional Development Institute.

- Continue to collaborate with existing programs and offices that develop and offer professional development programs for university employees.
6. SECURE AN OVERALL SALARY AND BENEFITS PACKAGE THAT RANKS BGSU'S ADMINISTRATIVE STAFF IN THE FOURTH POSITION AMONG PUBLIC UNIVERSITIES IN THE STATE OF OHIO.

7. CONTINUE TO DEVELOP AND IMPROVE COMMUNICATIONS AND PUBLIC RELATIONS AMONG ADMINISTRATIVE STAFF.

   - Continue the development of network capabilities.
   - Improve communication with administrative staff members who do not have connections to electronic mail.
   - Develop a public relations brochure for newly hired Administrative Staff.
   - Continue to distribute e-mail updates to administrative staff.
   - Development of a list server to send minutes from Administrative Staff Council meetings to all administrative staff members with e-mail capabilities.

8. CONTINUE TO COLLABORATE WITH BOTH THE FACULTY SENATE AND CLASSIFIED STAFF COUNCIL ON ISSUES OF COMMON CONCERN.

   - Continue to have representation on the day care policy committee.
   - Personnel Welfare Committee chairs from each constituent group will meet regularly regarding the benefit issues.
   - Advocate the implementation of an early retirement program for administrative and classified staff.
   - Collaborate with faculty Senate and Classified Staff Council in the development of the University community's strategic planning process.

9. CREATE A HOME PAGE FOR ADMINISTRATIVE STAFF COUNCIL THAT WOULD ENABLE US TO COMMUNICATE WITH GROUPS SIMILAR TO ADMINISTRATIVE STAFF COUNCIL ON OTHER CAMPUSES.
November 12, 1996

MEMORANDUM

TO:                Joan Morgan, Chair
                   Administrative Staff Council

FROM:              Sidney A. Ribeau
                   President

RE:                Compensation Plan Data Request

Concerning the data set that you requested in your letter of October 31, 1996, I am requesting that the Provost and Human Resources prepare in as timely a fashion as possible, the data set that you asked for.

I would ask that you keep in mind the sensitive nature of the information. Although this is public information, many staff members are not accustomed to the fact that their salaries could be published in reports for various purposes. In light of this, I would ask that you formally notify administrative staff that you have requested this data set and for what purpose(s).

I would like to emphasize once again that the compensation plan is a process which will require "fine tuning". My staff and I look forward to working with the Administrative Staff Council as the new administrative staff compensation plan continues to be refined.

cc:                Mr. Bryan Benner
                   Dr. Charles Middleton
November 15, 1996

Dr. Joan Morgan, Chair
Administrative Staff Council
101 University Hall
Bowling Green State University

Dear Joan:

One of the great joys of being a member of this community is the opportunity to provide service through a variety of committees, task forces and councils. It is also one of the things that makes it difficult to commit the kind of time I need to my responsibilities as Assistant Dean of Students.

In the last year, my responsibilities and assignments have increased beyond what I believe I can reasonably manage effectively. Therefore, I have had to evaluate where I believe I can be most effective this year. After thoughtful consideration, I have decided to resign from the Administrative Staff Council. Had I thought this would occur when I was elected to Council last Spring, I would have withdrawn my name before my colleagues had a chance to vote. I recognize the difficulty this creates in bringing on a new Council member and Executive Committee member, and will gladly do whatever I can to assist with the transition.

I am hopeful that I will return to the ranks of ASC again. I have found my experience enriching and enjoyable. My best to you and the rest of the Council in addressing the opportunities that lie ahead.

Respectfully,

[Signature]

Amy O'Donnell

pc: Jodi Webb, ASC Secretary
MEMORANUM

TO: Officers of the Faculty Senate
   Harold Lunde, Chair
   Robert Holmes, Vice Chair
   Veronica Gold, Secretary

FROM: Lester E. Barber, Executive Assistant to the President and Secretary to the Board of Trustees

RE: Senate's Resolution Updating Pregnancy, Family Care and Sick Leave for Faculty

I am writing to convey a decision reached by President Ribeau and the Board of Trustees' leadership on how to handle the Senate's September 1996 resolution to amend the Academic Charter on matters of faculty leave for family care, etc.

We recognize that it was the Senate's intent to bring the Charter into compliance with federal law on these topics. However, it is the advice of counsel to us that the goal is not cleanly met in this fashion.

We have therefore decided not to take action on the Senate resolution at this time, pending discussions with the Senate leadership and others—discussions which Provost Middleton will initiate—to consider more effective ways of meeting the law on employee family leave issues.

XC: President Ribeau
    Provost Middleton
    Nancy Footer, General Counsel
    G. Ray Medlin, Board of Trustees Chair
CSC Appointments for
University Standing Committees
1996-97

COMMITTEE NAME

Computing Council
   Nancy Frey
   Computer Services
   1999

Equal Opportunity Compliance
   Mary Louise Baty
   Medical Technology
   1998

   Susan Frost
   Library-CAC
   1999

Health, Wellness, and Insurance
   Mary Alice Newman
   Admissions
   1999

   Sue Wannes
   Physical Plant
   1998

   Ellen Naderer
   Firelands
   1997

Insurance Appeals
   Marge Houchins
   Bookstore
   1998

   Karen Wasson
   Health Services
   1999

Parking
   Barbara Garay
   Science Library
   1998

University Union Advisory
   Lois Howe
   Physical Plant
   1998

** TOTAL PAGE.002 **
EMPLOYEE RECOGNITION - STAFF AWARDS

Bowling Green State University has traditionally recognized the value and support rendered by the classified staff in accomplishing its assigned mission of providing the best possible environment for the student population. Recognition of valued service is accomplished by letters to individual employees, special sport events recognizing the classified staff, and the annual Staff Awards Ceremonies.

The Staff Award Ceremonies recognizes classified staff with 5, 10, 15, 20, 25, 30 or more years of total service to the University. A special dinner is given to staff with 15 or more years of total service. Each vice presidential area establishes a local ceremony for staff with 5 and 10 years of service.

University service is based on the total of all full-time and part-time employment of each classified staff member. Service for full-time employment is based on inclusive periods of full-time work. Service for part-time employment is based on 1 year of service for each 2,080 hours of work.

The details of the Staff Award Ceremonies are announced in the University Monitor and directly to affected individuals.

FAMILY AND MEDICAL LEAVE ACT (FMLA) POLICY

Bowling Green State University understands the importance of family issues in today's work force. The University also recognizes that more of its employees than ever face conflicting demands of family obligations and work. Because employees may find it necessary to take leave from their jobs for a temporary period to address certain family responsibilities or their own serious health conditions, and in order to comply with the Family and Medical Leave Act (FMLA) of 1993, the University has established a Parental Leave and Family and Medical Leave Policy.

The University will grant an eligible employee leave for up to 12 weeks during a 12-month period for the following reasons:

1. The birth or adoption of a child, or the foster care placement of a child.
2. To care for a "family member" of the employee ID that individual has a serious health condition.
3. A serious health condition of the employee renders the individual unable to perform his or her job functions.

Procedures for FMLA leave will apply also to leaves under state law and University policy that are longer than 12 weeks (medical, disability, maternity, etc.). Leave under state law and University policy will run concurrently with leave under this policy. The University will comply with both federal and state law, as well as University policy regarding these leaves.

A packet of information covering the University's policy, request forms, and required documentation is available in the Office of Personnel Services. A copy of Employee Rights under the Family and Medical Leave Act of 1993 is contained at the end of this handbook.

Questions or concerns regarding family or medical leave under this action can be addressed by calling Personnel Services (372-8421).

HOLIDAYS

BGSU observes ten (10) holidays each year. The holidays currently observed are:

January 1 - New Year's Day
3rd Monday in January - Martin Luther King Day
3rd Monday in February - President's Day
Last Monday in May - Memorial Day
July 4 - Independence Day
1st Monday in September - Labor Day
2nd Monday in October - Columbus Day
November 11 - Veteran's Day (formerly Armistice)
MEMORANDUM

TO: Sallye McKee, Special Assistant to the Provost

FROM: Joan C. Morgan, Chair

Administrative Staff Council

RE: December 5 Administrative Staff Council Meeting

Thank you so much for agreeing to speak at the December 5 Administrative Staff Council Meeting. Council convenes at 1:30 in the Alumni Room in the Union, and after a few housekeeping details, you will have the floor. A half hour presentation followed by questions from members of Council is the format usually used at these meetings. Typically 40-50 members of Council are in attendance. If you have any questions regarding this meeting, please give me a call. I look forward to seeing you on the fifth if not before.

JCM/nm
December 3, 1996

Joan C. Morgan, Chair
Administrative Staff Council

Dear Joan:

I have now reviewed the 1996-97 goals for Administrative Council. I don't have a particular comment about most of them as they all seem laudable. Whether they're attainable, or not, of course remains to be seen and depends upon how the year evolves. But at least as an aspirational statement they set a good and fair course for the future.

I wanted to comment particularly on one issue, Item #2, which deals with the development of a performance evaluation procedure. As you know, we are committed to provide a policy document to the Trustees for their review and adoption sometime this spring. It's going to be imperative in order to assure that we meet this deadline that the Administrative Staff Council and the Administration begin to put the final touches to that document sometime early in the spring semester. May I ask that you provide to me a suggested timeline for the discussions of this document. We can develop a clear and unambiguous set of expectations about what our deadlines are in order to assure full participation of members of the Campus community in the discussion and also allow adequate time for Trustee response as well. Thank you for your assistance in this matter.

Cordially,

Charles R. Middleton
Provost and Vice President

xc: President Ribeau
December 3, 1996

Ms. Joan Morgan
Chair, Administrative Staff Council
Academic Enhancement

Dear Ms. Morgan,

I wanted to take this opportunity, on behalf of the Bowling Green State University Foundation, Inc., to thank you for your commitment to preserving the integrity of the Foundation through your duties as fund administrator of Administrative Staff Scholarship Endowment.

The Foundation is pleased to provide you with this report of the Administrative Staff Scholarship Endowment as of June 30, 1996. The enclosed financial report is a summary of the corpus account balance and income account indicating the awards, gifts, expenses, and earnings for the 1995-96 fiscal year.

As you know, the corpus account portion of the account is held in perpetuity, while the interest generated from the account is used to satisfy the benefactor's directions on the use of the fund.

To further serve your needs as the fund administrator, we are continually working to enhance our ability to gather timely information about the recipient of the Administrative Staff Scholarship Endowment. It is through such measures that we can provide the services that you expect from us.

Because private dollars are increasingly important in maintaining quality programs here at Bowling Green State University, your commitment of ensuring the donor's wishes be followed is critical in securing future gifts.
FINANCIAL REPORT

Administrative Staff Scholarship Endowment

As of June 30, 1996, the corpus balance was $37,618.15 which includes 1995-96 gifts of $1,644.95 and realized gain of $2,271.00.

The following summary of the income account indicates the activity during the 1995-96 fiscal year:

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Balance 6/30/95</td>
<td>$1,838.21</td>
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<tr>
<td>Awards</td>
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<tr>
<td>Earnings</td>
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<tr>
<td>Other Income</td>
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<tr>
<td>Contributions</td>
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<tr>
<td>Expenses</td>
<td>0.00</td>
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<td>--------</td>
</tr>
<tr>
<td>Balance 6/30/96</td>
<td>$2,014.05</td>
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</tbody>
</table>

\[5/4/05\]
December 3, 1996
Page 2

If I may provide additional information or assistance, please do not hesitate to contact me. Once again, please know how much Bowling Green State University values your commitment. We continue to build on our past successes and look forward to greater accomplishments in the future.

Sincerely,

[Signature]

John C. Moore
President & CEO

Enclosure
December 11, 1996

Charles R. Middleton
Provost and Vice President

Dear Chuck:

You recently requested a suggested time line for discussions about the performance evaluation procedure for administrative staff. The committee looking at this process has come up with a draft that Judy Donald and I plan to share with all administrative staff during the week of December 16. We will ask for feedback regarding both the form and the procedures. Plans are being made to discuss performance evaluation at the January 2 Administrative Staff meeting. At this point, I am concerned about some of the issues related to the form and procedures that are surfacing. These include: How is the form going to be used? Will it be used to determine merit? Will it be used to determine movement through the salary levels? Will it be used solely to improve performance? I'm anticipating a lively discussion at our January meeting and do not anticipate ASC endorsement of either the form or the procedures at that time.

Since you are scheduled to attend our February Administrative Staff meeting, this might be a good time to discuss the performance evaluation form and its relationship to the entire evaluation process. I believe the form should be a small part of the process and that training of supervisors as well as employees is needed if such a process is to be successful.

I hope this tentative time line gives you an idea of our thoughts. I will be happy to discuss this and any changes or suggestions you may have.

Sincerely,

Joan C. Morgan, Chair
Administrative Staff Council

JCM/nm
December 17, 1996

Joan Morgan, Chair
Administrative Staff Council

Dear Joan:

Thanks for the update on the performance evaluation procedure and form for administrative staff. I don't believe at this time, based upon what you've told me, that I need to anticipate coming to discuss these matters with the Council prior to my scheduled meeting. I say this with the understanding that nothing will be finalized prior to that meeting and our opportunity to share ideas on where we are at that time will remain open at least until that date.

For me, the issues seem to be relatively straight forward. We need to get down to a wide spread agreement on most, if not all of the matters raised in your letter. Then we can concentrate our discussion on the final few (and no doubt most critical) issues that will remain thereafter.

With regard specifically to the questions you raise about how the form is going to be used etc., I look forward to hearing the various points of view that will materialize on these questions over the course of the next six weeks or so. For me, two things are vital. First, every administrative staff person must be evaluated each year, and where administrative staff persons serve as supervisors, part of their own evaluation must be on how effectively they perform the evaluation of other members of the administrative and/or classified staff. This principle will also apply to faculty members who have administrative staff members reporting directly to them.

The second issue requires more discussion. It is this: whether the form is used for assessing merit or not, some merit assessment process needs to be in place for consideration of the Trustees this spring. On the principle that the fewer forms that we have the better, I would suggest that we regard this evaluation procedure as integral to the merit assessment process of the Campus. How we might accomplish attaining that goal, of course, remains to be seen. But I don't personally know of any reason off hand why we should have one form for annual performance evaluation and a separate form or process for merit salary increases. Perhaps there are good answers to that concern and I am eager to know them, if there are any. But as a first take this view may serve to focus the discussion that takes place over the next few
months. I want to emphasize, however, that I am entirely open as to the outcome of this question at this time. I really do want to be in a position to respond to the best ideas that you and your colleagues in the administrative staff can come forward with as a result of your deliberations.

I hope these comments are useful. Best wishes for a happy holiday season to you and all the members of the administrative staff as well as their families.

Cordially,

Charles R. Middleton
Provost and Vice President
2 January, 1997

Memorandum

TO: Dr. Joan Morgan, Chair, Administrative Staff Council

FROM: Erik Graubart, Director, Language Laboratory; administrative staff


Due to the timing, two weeks of repetitive flu, vacation and sick leave days since December 20, 96, my comments are "late" inasmuch as they are written on the last "date due" suggested. Still, the subject matter is so important that I do not wish to forego the chance for some sort of input with regard to the proposed "draft" form.

Overall the form is too long, too complex, and puts both excessive work and unchecked power and responsibility on the "supervisor" who has to do all that observing, judging and rating. Pity the supervisors who have more than a couple of staff to rate annually! When comparing the rating process used for faculty, there seems to be a more democratic process, spreading responsibility for judging individuals to a number of sources (promotion committees, chair, dean, college councils, and then up to the VPAA level.)

The twelve areas could be condensed to six or eight (except for adm. staff in the salary levels 16-22). Too many areas blocked out as "not applicable" will not look good but may yet tempt the persons filling out the categories to invent data just to fill the spaces. Pay level 14-7 staff usually are too busy doing their 40-hour (plus) jobs to even dream of areas 11, 12, 13, 14, 15, 16, 17, and if they do, they are not spending their time on their primary core work. Area 2 should therefore automatically be of highest importance (counting as no less than 50% of the total rating—as "teaching" is, or should be, for most faculty.) Area 1 is self-explanatory: if people do their job well and to the best of their ability they will be committed to the employer and its mission; areas 3 and 4 as well as 6 and 7, to the extent they are truly applicable are really incidental to doing one's best in area 2. Thus, for most people in pay levels 15-7, the rating areas that should be weighted as 50-60% of overall performance are 2, and to a limited extent four to six other "core" categories which describe the job in the same way the pay levels were rated, weighted, and established.

The second specific objection is the "GOALS" emphasis. From custodians to full professors, we are not asking classified staff nor faculty every year what their specific, measurable goals are—and then, a year later, holding them to it. One "goals" outline and discussion for the primary job mission is all it should take and only to the extent that the employee really has the power, the funds, and the position-defined freedom of action to actually do something about the goals.
To: Judy Donald

From: Joan Maizan

Office Phone: (419) 372-2677

Re: FYI
January 8, 1996

MEMORANDUM

TO: Tonia Stewart
   Associate to the Vice President
   for Student Affairs

FROM: Joan C. Morgan, Chair
       Administrative Staff Council

RE: January 2, 1997

Tonia during the Spring, 1996 Administrative Staff Council (ASC) elections, an administrative staff member was elected to serve on ACGFA. His name is Jerry Wollmering. He is an Assistant Athletic Director in the Athletics Department and can be reached at 372-7057. The Administrative Staff member receiving the next highest number of votes is Michelle Simmons. Michelle is therefore the alternate. She is an Assistant Director of Financial Aid and can be reached at 372-2994.

Each spring Administrative Staff has elections and one of the positions listed is that of ASC representative to ACGFA. The person receiving the highest number of votes is our representative and the person receiving the second highest number of votes is the alternate.

If you have any questions, please let me know.

JCM/nm
December 18, 1996

Joan Morgan
Chair, Administrative Staff Council
Academic Enhancement
101 University Hall
Bowling Green State University
Bowling Green, OH 43403

Dear Joan:

In accordance with the provisions of Section II.C. of the enclosed selection and membership procedures for the Advisory Committee on General Fee Allocations (ACGFA), which are effective for the 1997-98 fiscal year, please file with the Office of the Vice President for Student Affairs, 305 Saddlemire Student Services Building, a written plan outlining the selection or election procedure to be used by the Administrative Staff Council in naming a member and an alternate.

This plan together with the names, addresses and phone numbers of the member and the alternate together with a certification that the selection/election procedure was followed must be filed in my office by 5 p.m., January 17, 1997. Please note that Section IV, of the enclosed provides that failure of any eligible organization to meet the announced 5 p.m., January 17, 1997 deadline will result in the loss by that organization of the opportunity to name a member and an alternate for the 1997-96 fiscal year.

Sincerely,

Tonia K. Stewart, Ph.D.
Associate to the Vice President for Student Affairs

Enclosure
January 9, 1997

Charles R. Middleton
Provost and Vice President

Dear Chuck:

At the January meeting of Administrative Staff Council (ASC) a number of issues surrounding the performance evaluation process as well as the merit assessment process were discussed. For your information, these are presented below.

1. We agree with you that every administrative staff person must be evaluated each year. However, how this should be done is still under discussion.

2. Administrative Staff Council believes that the performance evaluation form needs to be separated from the merit assessment form. The main outcome of any performance evaluation should be to improve an individual's performance. On the other hand, merit assessment is used to reward an individual's performance. Because of these differences these two forms and accompanying processes need to be separated.

3. Instead of using the proposed performance appraisal form to evaluate performance only, at this point we are exploring dividing this form into two parts: one to appraise performance and one to assess merit. The performance appraisal would be the narrative part of the form giving the employee and the supervisor the opportunity to express themselves about both the employee's goals and progress toward meeting these goals. Merit can be assessed by using the area rankings and weightings already in existence in the proposed form. Weightings, however, should be determined at the beginning of the assessment period for each employee not at the end of that period. Although it is recognized that there is a close relationship between these two processes, as the University moves towards a required performance appraisal and merit assessment process for all administrative staff, a clearer distinction between these two processes is essential.

4. Since this is the first time the University is going to be using a uniform form for these processes for the administrative staff, ASC recommends that these processes be reviewed annually by ASC and the opportunity be available to make changes.

5. A need exists to clearly define merit for administrative staff. Such a definition should be a university wide one with some variability within divisions and departments. We look forward to working with you in defining merit for administrative staff.

6. Merit must be tied into the completion of performance appraisal forms by supervisors. Supervisors not thoughtfully completing these forms should not be eligible for merit.
7. We continue to be concerned about the implementation date. Since the forms and procedures will not be finalized until later this spring, implementation should begin in the late spring with the meeting between the employee and supervisor to discuss goals for 1997-98. To use either a new performance appraisal form or merit assessment form to evaluate performance or make decisions about merit for administrative staff for 1996-97 would be inappropriate and unfair.

8. Administrative staff will continue to be opposed to any division between across the board and merit increases until the salary pool is large enough to guarantee all personnel at the University at least a cost of living salary adjustment.

We are still in the discussion stages and will continue to discuss the issues presented in this document as well as others that arise. Executive Committee of Administrative Staff Council and our Personnel Welfare Committee are meeting weekly in an effort to resolve these concerns. If you have any input that you feel would assist us in our deliberations please let me know.

Sincerely yours,

Joan C. Morgan, Chair
Administrative Staff
January 30, 1997

Dr. Charles Middleton  
Provost and Vice President for Academic Affairs

Dear Chuck:

We look forward to your visit to our February 6 Administrative Staff Council meeting at 1:30 in the Alumni Room of the Student Union. As I mentioned to you in an earlier correspondence the issues of defining and assessing merit are presenting some real challenges for administrative staff. Some progress has been made, but members of our Executive Committee and Personnel Welfare Committee (PWC) felt it would be helpful if you would address the following issues related to merit at our February 6 meeting.

• We recommend that performance appraisal process be separate from the merit assessment process because the performance appraisal process should be used to improve performance and merit should be used to reward performance.

• We continue to struggle with the issue of cost of living raises as these are related to merit. Raises have been so small at the University for the past few years that many administrative staff feel it is unfair to distribute merit if cost of living is not dealt with first.

• We are interested in hearing about the merit systems for administrative staff with which you are familiar. Also do you have any positive or negative feelings about such systems?

• It has been proposed that training be an integral part of this process, and we advocate such training begin as soon as the performance assessment form is in place so that the appraisal process for 1997-98 can start in late April or early May.

• One proposal being discussed by our Executive Committee and PWC is that administrative staff who perform satisfactorily as measured by the performance appraisal form would receive a certain percentage raise - perhaps 80%. Those not performing satisfactorily would receive less than this percentage and those performing above the satisfactory level would receive more. This proposal has not been discussed with administrative staff, but guidance from you is needed as our discussions continue.

• When will the new performance appraisal and merit assessment process be implemented?

• Concerns exist that merit dollars will be used to address the issue of taking care of salary inequities as administrative staff move through the salary levels.
In addition to these issues there are several other concerns listed below that, if time permits, we would like you to address on February 6.

- Since administrative staff have the least job security of any constituent group on campus, we would like to explore the feasibility of multiple year contracts for administrative staff who have 3-5 years of satisfactory performance at the University.

- With the discussion of eliminating the ERIP for faculty, administrative staff and classified staff are interested in the feasibility of having one more offer of an ERIP for staff. Implementation of the ERIP for staff would offer a humane way to deal with any future downsizing that may occur at the University.

- Will summer hours continue?

- When the University makes a decision not to continue employees with more than three years of contract services, full time administrative staff members' must be notified of this decision not later than January 1 of any subsequent year of contract service. Are plans being made to change this? If so what is being discussed?

These are the main issues we would like to discuss with you. I'm sure, however, that others may arise. Please give me a call if you have any questions.

Yours truly,

Joan C. Morgan, Chair
Administrative Staff

JCM/nm
MEMORANDUM

TO: Lisa Wayne, Promotion Assistant  
WBGU-TV

FROM: Joan C. Morgan, Chair  
Administrative Staff Council

RE: WBGU-TV's March Membership Campaign

Lisa, below are the names of administrative staff at the University who have volunteered to work at the following times on March 23. I would appreciate it if you would communicate directly with them about their responsibilities. Let me know if you have any questions.

12:00-4:00

Mary Beth Zachary, Library  
Duane Whitmire, Computer Services  
Ann Betts, Food Service  
Patti Ankney, Chemistry  
Rick Kasch, Computer Services  
Linda Hamilton, Planning and Budgeting  
Dianne Abbott, Academic Enhancement

4:00-7:00

Susan Darrow, Honors Program  
Randy Julian, Athletic Department  
Pat Kania, Computer Services  
Theresa Kallmeyer, Environmental Health and Safety

JCM/mh
February 13, 1997

Mr. Donald C. Williams, Chair
Alumni Board of Trustees

Dear Mr. Williams:

Larry Weiss recently informed me of the decision of the Alumni Board to provide up to $5000 in matching funds for our Administrative Staff Scholarship; and on behalf of Administrative Staff I thank you for this support. We plan to start a major fund raising campaign in the fall and the incentive you have given us will provide many with the necessary motivation to contribute to our scholarship. Hopefully, we will rise to the challenge and be able to raise $5000. This would certainly give us the opportunity to provide additional scholarship dollars to deserving students at Bowling Green State University. We sincerely appreciate your support in this important endeavor.

Cordially yours,

Joan

Joan C. Morgan, Chair
Administrative Staff Council

JCM/nm
Good morning Chairman Medlin, members of the Board and President Ribeau.

The past two months have been busy ones for Administrative Staff Council. The committee studying the performance appraisal process is sending forth to the President's office a performance form and suggested process for administrative staff. In addition to this initiative, a subcommittee of our Personnel Welfare Committee has been studying the merit process and is going to circulate a document to administrative staff on March 4 or 5 and will discuss at an on call meeting of Administrative Staff Council on March 13.

The leadership of Administrative Staff Council has been meeting with the leadership of Faculty Senate, Classified Staff Council, Graduate Student Senate and Undergraduate Student government on a regular basis in what we care calling a constituent caucus. At one of our recent meetings we discussed and acted upon a number of topics that will have an effect on student retention at the University. These include:

1. A commitment to an initiative aimed at positively influencing undergraduate success at BGSU. A request was sent to a number of individuals who deal with retention on a daily basis to ask them to submit five strategies to intervene when students are struggling with academic issues. The list generated will be shared with faculty and teaching graduate assistants and anyone else interested in receiving this information has been made.

2. Faculty interest in a mentoring program is being assessed as a direct result of the recommendation of this caucus.

3. We are starting to take a look at academic policies that need to be studied because of their potential negative effect on student retention. Included in this list is the current five year dismissal policy for students who are suspended a second time, the current course drop policy and the current reading articulation policy. We plan on reaching out to interested parties and the Undergraduate Council about these concerns.

These meetings are important in helping to build community at the University and I hope these continue throughout the remainder of this year and become institutionalized.
We continue to meet with the other employee groups on campus to discuss the Family Medical Leave ACT.

This ends my report. Are there any questions?
February 26, 1997

President Sidney Ribeau  
President's Office  
Mc Fall Center

Dear Sidney:

Thank you for agreeing to attend our next Administrative Staff Council meeting. This will be held at 1:30 on March 6 in the Alumni Room in the Student Union. The meeting lasts until 3:00. Typically close to 50 representatives are in attendance.

There are several suggestions that I have for topics of general interest and these are listed below.

1. Share your insights into the federal and state budget picture for higher education. The information you shared with the Legions regarding the American Council on Education's proposals to help families afford higher education would be most appropriate. In addition the America Reads Challenge would also be of general interest.

2. A discussion of the ways administrative staff can assist the University in its lobbying efforts with Columbus. If you have the names and addresses of representatives that could be shared at the meeting this would be most helpful.

In addition to these topics, I'm sure there will be questions about a variety of other areas from the floor, and I think it would be most useful to open the meeting to questions from those in attendance. If you have any questions, please contact me.

Sincerely yours,

Joan C. Morgan  
Chair, Administrative Staff Council

JCM/nm
MEMORANDUM

TO: Donna Wittwer
   Benefits Manager

FROM: Joan C. Morgan, Chair
       Administrative Staff

RE: April 3 Administrative Staff Council Meeting

Donna, you are on the agenda for the April 3 Administrative Staff Council to speak about "New Managed Care Program Under Worker's Compensation-What you Need to Know as a BGSU Employee". Two other guests will also be in attendance: Larry Weiss and Gary Swegan. Both guests will have short, perhaps 5 minute presentations. I know you are planning on a 20-30 minute presentation so it makes sense to have you third on the agenda.

I will be out of town on April 3. Consequently Duane Whitmire will be chairing the meeting. If you have any questions please let me know.

Thanks.

JCM/nm

pc: Duane Whitmire
   Jodi Webb
March 31, 1997

MEMORANDUM

TO: Deans
    Vice Presidents
    Hal Lunde, Chair, Faculty Senate
    Joan Morgan, Chair, ASC

FROM: Charles R. Middleton
      Provost and Vice President

RE: Committee on Dual Career Couples

Attached you will find a copy of the report of the Committee on Dual Career Couples which has completed its work and submitted several recommendations to me for my consideration. In order for these recommendations to receive wider discussion in the faculty and administrative staff, I am forwarding this document to you at this time. I ask that you and your colleagues review it thoroughly. I anticipate discussing it with you after you have had an opportunity to conduct that review.

Thank you for your assistance in developing a policy that will assist the University in the recruitment and retention of faculty and administrative staff who have the unique needs of the modern dual career couples.

Enclosure

cc: President Ribeau (with enclosure)
    Dual Career Couples Committee Members
MEMORANDUM

To: Charles R. Middleton  
Provost and Vice President

From: Committee on Dual Career Couples  
Peggy Giordano, Sociology (Chair)  
Marvin Belzer, Philosophy  
John Hayden, Mathematics and Statistics  
Beth Jakob, Biological Sciences  
Naomi Lee, Technology  
Mary Ann Roberton, HPER  
John Sampen, Performance Studies  
Norma Stickler, Provost/VPAA Office  
Paul Yon, Center for Archival Collections

Re: Recommendations of the Committee

March 12, 1997

The members of the dual career couples committee are in agreement that Bowling Green State University needs to be more supportive and pro-active regarding the needs of dual career couples. Increasingly, considerations about seeking and accepting employment have involved decisions concerning two careers. The committee analyzed written materials, brochures, and policy statements of other universities which have developed programs designed to address concerns of dual career couples. We also interviewed personnel at several institutions (Purdue, Oregon State, Minnesota, Nebraska, Arizona, and Pennsylvania State) who are involved with these programs. The interviews were designed to elicit more information about the scope of each university's program, the types of individuals served, and the perceived impact/success of each program. We also attempted to determine whether there had been any negative consequences stemming from the implementation of these programs. Finally, the committee reviewed recommendations of an earlier (1989) BGSU committee which had received a similar charge.

The interviews with other institutions suggested that these types of programs can be successful. The programs varied widely and received differing levels of financial/personnel support, but it appeared that a critical variable relating to a program's success was the active encouragement and support of top-level administrators. Given your own assessment regarding the desirability of developing specific strategies in this area, and the enthusiasm of staff at these other institutions, the committee is encouraged about the potential of a dual career program at BGSU.
RECOMMENDATIONS OF THE COMMITTEE ON DUAL CAREER COUPLES

RATIONALE

To become more responsive to the needs of today's university employees, the Committee on Dual Career Couples recommends that Bowling Green State University institute a policy to accommodate the unique employment concerns of career couples. Such a policy would serve to strengthen BGSU's recruitment potential and increase the likelihood of attracting the most qualified applicants for future positions. Further, by alleviating the transitional stress of worrying about partners' career opportunities, such a policy would contribute to the optimal performance of recently hired personnel.

Not only would such a policy be an advantage in the recruitment of new faculty and administrative staff, but it could also serve to retain those employees who might otherwise choose to leave. Having both partners employed in meaningful work decreases the incentive to look elsewhere for employment.

In addition to the benefits to the individual employees involved and the departments that recruit them, the university as a whole benefits from the positive affirmative action statement made by this policy. BGSU is more likely to attract female candidates if they know that the partner's search for employment will be facilitated. Similarly, by assisting the search of female partners of male candidates, we potentially increase the number of women on campus. In both instances we have made a positive move in the balance of male to female faculty and administrative staff members.

SCOPE OF THE PROGRAM

1. The Committee recommends that BGSU implement a program designed to assist and support the employment search of partners of recruited faculty or administrative staff. Although some university programs provide an array of other services (e.g., assistance with the search for housing), Committee members agreed that the primary emphasis should be placed on the employment concerns of the accompanying partner.

2. The Committee concluded that the program should emphasize partners of newly recruited faculty/administrative staff. However, the partners of existing employees may also benefit from these services on a case by case basis as resources permit. Thus, the program ideally would enhance our efforts with regard to both recruitment and retention of outstanding BGSU faculty/administrative staff. Given the limited resources likely to be available, the Committee suggested further that partners of graduate students or classified staff would not be included within the program's scope.

3. The services of this program should be open to partners as they are defined by the recruited faculty member or administrator. Therefore, terms such as "spouse" or "family" should be avoided, and more inclusive language should be adopted for use in connection with the program (e.g., couple or partner).

4. Employers within BGSU or the extended business community will not be asked to create positions that do not support the University or department's mission or hire those who are unqualified. Employers will not be asked to change hiring policies and will retain the right to make their own decisions.
NATURE OF THE PROGRAM

A position of Coordinator of the Dual Career Program should be created and funded. At several institutions (e.g., Purdue, Nebraska) this has consisted of a 1/2 time position and appropriate clerical support. At the University of Minnesota a graduate student (from Counseling or a related area) was also assigned to work closely with the program coordinator. Our program should have a close connection with the Office of Academic Affairs (in terms of the physical location of the program and/or the reporting hierarchy). The Committee felt that this arrangement would have a symbolic value in enhancing the perceived legitimacy of the new program and its Coordinator; however, even aside from such considerations, Academic Affairs is likely the most appropriate unit.

The Program Coordinator will need to develop strategies to assist two different types of partners: a) partners who wish to obtain a position at BGSU and b) partners who seek other types of employment (e.g., in business, law, primary/secondary education or at another university). Interviews with staff at other universities suggest that a majority of the partners of new hires involve the second type of employment. Some activities of the Coordinator will apply in either type of situation, but there are some issues unique to each type:

**Off-campus Positions**

The Dual Career Program should be an important resource for the professional partner seeking non-academic employment. The Coordinator, as external liaison, should develop a network of formal and informal contacts so as to be prepared to match professional expertise with organizations, businesses, schools, and agencies in the region. The formal contacts could build on existing programs such as the "Relocation Assistance To Spouses" program developed by the Employers Association of Toledo. The importance of informal networks was also emphasized repeatedly in our interviews. These networks include alumni, University personnel with unique external relationships (e.g., faculty in the College of Education who can assist in partners' searches for teaching positions in elementary/secondary education), and networks of peer professionals. Using the network, the Coordinator will initiate correspondence with appropriate agencies, distribute resumes, and assist in arrangements for the partner to interview with identified potential employers. In addition to this critical networking role, the Coordinator may also direct the partner to other campus resources/services (e.g., Jerome Library's Center for Career Resources). The Coordinator should develop a thorough understanding of these other resources, in order to avoid duplication of effort. We recommend that the Dual Career Program should continue to offer support in career planning and placement services for a period of time (e.g., one year) after the couple has relocated to Bowling Green.

It is also important that BGSU attempt to establish creative relationships with business, governmental agencies and other universities that will increase the probability of finding or developing suitable employment for partners. An example: a person might work 1/2 time as an adjunct professor at BGSU and 1/2 time for Wood County or the City of Perrysburg on problems associated with rapid population growth. Creative affiliations of this type, which can be established only if we build the necessary relationships within the community and then aggressively pursue and support the development of path-breaking jobs, also would establish valuable external affiliations for BGSU within the community.

On behalf of academic partners seeking employment outside of BGSU, we recommend that the University President, Provost, Deans, and the Program Coordinator attempt to establish innovative reciprocal relationships with other Universities and Colleges in the region. These relationships will increase the probability that an academic partner will be successful in finding suitable employment.
when placement at BGSU is not feasible. Such relationships no doubt will be even more complicated than those involving different units on campus. Nonetheless, we believe that BGSU should lead in aggressively attempting to establish such relationships with the institutions within commuting distance, including the University of Michigan, Eastern Michigan University, the University of Toledo, the Medical College of Ohio, and the smaller universities and colleges in the region.

On-Campus Positions

The successful coordination of a recruitment effort involving two University positions is complicated and difficult to accomplish "politically." Nevertheless, if we become more responsive and pro-active in this regard, we could greatly enhance BGSU's ability to attract and retain outstanding faculty and administrative staff. Therefore, the Committee favors the idea of devoting increased attention to the employment concerns of the accompanying partner, but believes that in these cases the active support of chairs, relevant deans and the VPAA will be required. In addition, to facilitate such hires, constituent leaders should attempt to educate the existing employees about the general desirability of working together across units. It is necessary to change norms and attitudes as well as to implement specific procedures which ensure that such cases are handled in an equitable manner.

Some incentives and resources are needed if this aspect of the program is to be successful. University units value their decision-making autonomy and do not wish to give anything up in order to facilitate another unit's hiring activities. Therefore, the unit involving the partner must first make a decision about the qualifications and areas of expertise of the partner. If it is determined that the candidate has outstanding qualifications which fit well with that department's long term goals and objectives, one of several strategies could be implemented, depending on the circumstances involved:

1. **Regular Positions.** At some universities (e.g., Kansas) several positions are "held back:" at the Provost level with the expectation that these may be needed to facilitate dual career hires. Another strategy would be to examine a given department's retirement patterns. If one or more retirements are likely to occur within a reasonable period of time, the VPAA could fund the partner on a temporary basis, until such time as a position is made available through retirement or resignation.

2. **Bridge Funding.** Every potential faculty member would like a secure, tenure-track position; however, the University may be able to provide some level of assistance/employment short of this. A Faculty Fellowship program could be implemented. For example, the University of Nebraska-Lincoln offers a one-year stipend of $15,000 plus benefits to its faculty fellows. These are funded 2/3 by the Dual Career office and 1/3 by the relevant Dean. This would be a relatively low-cost way of providing a home base to the partner, as well as a degree of academic legitimacy. The University of Minnesota has also developed a program designed to provide bridge funding for the accompanying partner. They fund the partners at a level commensurate with their qualifications, and gradually reduce this amount over a 3 year period. Bridge funding allows partners a longer window of opportunity in which to secure employment--either with the initial "home base" or elsewhere.

3. **Other Options.** Department chairs should be open to discussions regarding the availability of laboratory and/or office space, temporary teaching assignments, or to exploring other ways in which their department can facilitate the partner's employment needs. It is recognized that these will not always be available, but it is very important to communicate with the partner about any short or long term prospects for employment. If the chairs and directors could receive some funds from their Dean or the VPAA for these purposes, they would obviously have additional motivation to work something out.
Other Recommendations for Implementation

1. Advertisements for positions should state that Bowling Green State University is responsive to the needs of dual career couples. This initial statement "opens the door" early for faculty to discuss issues that may relate to their partner's employment needs. This will allow Bowling Green adequate lead time to assist partners in finding employment as quickly as possible.

2. A brochure describing the services offered to dual career couples should be developed and sent to candidates as soon as possible during the hiring process. This is another way to facilitate an early discussion of these issues.

3. Information about the Dual Career Program should be available on University and department web pages.

4. The above suggestions should be discussed with faculty and administrative staff (e.g., Faculty Senate and Administrative Staff Council) in order to get additional ideas and input.

5. The program will undoubtedly go through several phases. Initially, some attention will need to be directed to dual career issues facing current faculty; eventually the emphasis should shift to new hires. In addition, personnel at other universities noted that it takes time for networks and effective contacts to develop. Therefore, the program should not be abandoned after a short period if it is not immediately successful in all instances.

6. We recognize that not all dual career issues can be solved through the use of one of the above-mentioned suggestions. Although such strategies as shared positions (or 1/2 times positions; leaves without pay) are beyond the scope of the current committee, there is a real need to become more open to the creative use of faculty and staff lines/resources in order to attract and retain the best personnel.
Attached you will find the final draft of document titled "Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University." This document has been discussed in two administrative staff committees throughout the Spring semester: our Executive Committee and our Personnel Welfare Committee. In addition it has been presented and discussed at two Administrative Staff Council meetings. We would like you to review it and share it with the cabinet. We have scheduled a meeting with you on April 29 to discuss this document further and plan to take it to Administrative Staff Council, hopefully for a vote, on May 1. Duane Whitmire will also be attending the April 29 meeting.

We look forward to discussing this document further with you before it is adopted.

JCM/JL/nm

attachment

be: Duane Whitmire
March 31, 1997

MEMORANDUM

TO: Joan Morgan, Chair, ASC
    Pat Kitchen, Chair, CSC
    Hal Lunde, Chair, Faculty Senate

FROM: Charles P. Middleton, Provost and Vice President
      Hal Lunde, Chair, Faculty Senate

RE: Report and Recommendations of the Task Force on FMLP

The Task Force on the Family and Medical Leave Act has now completed its work and submitted to us a report which is attached. In addition, you will find attached a copy of the transmittal memorandum from Bob Holmes who chaired the Task Force in which he raises some additional items for discussion by the constituent communities of the University.

We are forwarding these two documents to you with the request that you institute a discussion of them as soon as possible. Provost Middleton will be prepared to discuss these matters at the meetings of the various constituent groups when you have had an opportunity to review these documents and to prepare recommendations on them.

The goal is to secure the simultaneous passage of the documents through the three constituent group processes of review and recommendation. This goal can be attained, in our view, only by careful consultation and collaboration in the review process. Therefore, we encourage you to consult with each other regularly as this review proceeds.

We would hope to be able to take the matter to the Trustees as soon as possible but no later than June, 1997 for final action. In order to meet this goal, therefore, it will be essential to complete the review process during the month of April, 1997 if at all possible.

Please let us know if you have any questions about this matter and thanks for your assistance in moving this discussion along.

cc: President Ribeau (with enclosures)
    President's Cabinet (with enclosures)
    Deans' Council (with enclosures)

Attachments
MEMORANDUM

TO: Ann Marie Lancaster
    Provost Associate

FROM: Joan C. Morgan, Chair
       Administrative Staff Council

RE: Nominations to Serve on Search Committee for Director for Women's Resource and Action Center

Ann Marie, below you will find the names of six administrative staff members who I feel would be effective committee members for this search.

Jill Carr
Beth Casey
Pat Green
Inge Klopping
Naomi Lee
Jan Peterson

If you have any questions or wish additional information, please feel free to contact me.

JCM/nm
MEMORANDUM

To:       Joan Morgan, Chair
           Administrative Staff Council

           Pat Kitchen, Chair
           Classified Staff Council

From:     Ann-Marie Lancaster, Provost Associate

Date:     April 7, 1997

Re:       Search for Director of the Women’s Resource and Action Center

As you are most likely aware, last October Chuck Middleton established a task force to identify the programs and services that could be offered through a women’s center established at BGSU. The task force presented its report in December and since that time, the resources necessary to proceed with the establishment of a women’s center have been identified.

At this time, we are establishing the search committee to proceed with the search for the Director of the Women’s Resource and Action Center. The Director position has been designated as an administrative staff position. We ask that each of you provide us with the names of six individuals from your respective employee groups whom you think would be effective committee members for this search. It would be particularly helpful if you would identify individuals who have demonstrated an awareness and understanding of the many issues involved in establishing and maintaining supportive work and educational environments for women.

If possible, please send your nominations to me by Friday, April 18. If you have any questions or wish additional information, please feel free to contact me (alancas@cs.bgsu.edu or 2-8373). Thank you.
Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University

The Administrative Staff Council believes that a number of important principles must form the foundation for an effective performance appraisal process and for the equitable distribution of salary increment awards. The Council endorses the concept of a performance-based merit system for awarding employee salary increases provided such a system is fair, equitable, and firmly grounded on these principles. By "merit", the Council means a salary increment that is allotted for performance of duties that meets or exceeds unit expectations. The rationale for this definition is provided by the following principles of an effective merit system.

1. An effective merit system should promote employee recruitment and retention, adequately reward conscientious performance of normal duties and responsibilities, and provide incentives that encourage distinguished, innovative and creative achievements to meet unusual challenges and opportunities when they arise.

2. A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges or departments).

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member.

4. A performance-based merit system should engender the type, quantity, and quality of performance that contributes to the achievement of institutional and unit missions and goals. The reward system also needs to recognize that there are often multiple paths that may be taken in support of missions and goals.
5. A merit system needs to establish a clear connection between employee performance and reward. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well as those types of achievements that surpass the unit's standard expectations.

6. The performance appraisal process should provide employees with constructive comments that enable them to develop professionally and to make improvements in performance.

7. The merit system must avoid trivializing the system by spreading merit too thinly and thus minimizing the impact of any incentive awards given.

8. Even the best annual review systems may produce salary inequities or may fail to appropriately reward contributions or performances that occur over longer periods of time. Thus, an annual merit review system needs to be supplemented by periodic five-year comprehensive reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster cooperation among staff, should reward groups and teams as well as individuals for collaborative work performances, and should generate wide support and general satisfaction on the University campus.

10. Both the performance-based merit system and the performance appraisal process will be reviewed annually by ASC.

Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to Administrative Staff members.
7. All employees will be evaluated in their annual performance reviews to determine their eligibility for merit. Merit eligibility is determined by the job performance of an employee, as assessed by the Administrative Staff Performance Appraisal Form. Performing one's job at a satisfactory level and in a competent manner is the basis for merit pay. Given that an employee will qualify for a merit increase by meeting, as well as exceeding, unit standards, it is expected that very few employees will fail to qualify for merit.

8. Any employee who does not qualify for merit in their annual performance review should not receive a salary increase. A professional development fund equal to the uniform percentage raise that would have been allocated to the individual, should be made available to the department or academic unit for employee development, with priority given to assisting employees who have failed to qualify for a merit increment.

9. For recommendations (9a) and (9b) below, the threshold shall be the greater of 3% or Cost of Living Adjustment (COLA).

a. If the total merit pool in a given year is the threshold or less, all administrative staff employees who qualify for merit by meeting or exceeding departmental expectations in their annual performance reviews will receive the same percentage increase in salary.

b. If the merit pool in a given year is more than the threshold, the amount over the threshold will be allocated to departments and academic units for recognition of merit-eligible employees whose level of performance exceeds departmental expectations as defined by its merit policies.
Recommendations

1. Each year the University should first review and address those employees whose salaries are less than the midpoint of their salary grade, to identify and rectify potential salary inequities. Funds should be made available on a regular, on-going basis to support raises for promotions, salary equity adjustments, market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary. These funds should support the administration's commitment to move staff into the appropriate quartile of their salary range. These funds should not be considered a part of the annual merit pool.

2. Meritorious performance should be rewarded:

a. Upon the completion of five years of meritorious assessments, an employee's salary shall be increased by 3% more than their proposed merit increase, provided the raise is based on documented merit.

b. Upon the completion of seven years of meritorious assessments in the same salary grade, any employee whose salary is below the midpoint of their assigned grade in the Administrative Salary Compensation Plan, will have their salary increased at least to the midpoint.

c. After five consecutive years of meritorious assessments, the employee shall be granted an annually renewable five year contract with provisions for annual salary increases.

3. To increase productivity, a merit system must be administered openly and reliably. Thus, changes in evaluation and merit pay criteria must be completed BEFORE the new contract year, i.e. before June 30 of the prior contract year. To ensure that employees can contest unfair merit pay assessments, a timely disclosure of the AMOUNT of the merit pay recommendation is necessary. Continual dialogue between the supervisor and the employee about progress towards goals is essential.
TIME DEADLINES

a. Performance appraisal forms must be completed by May 15 of the prior contract year.

b. Merit pay recommendations must be known at the completion of the evaluation process. (May 31)

c. Merit pay criteria must be known prior to start of the next contract year.

Failure to meet any of items a-c defaults to the employee being awarded AT LEAST the average increase given to all contract staff. For e.g. in 1996, the default pay increase was 3%.

d. A supervisor will meet with employees between November 15 and January 15 for a dialogue on progress toward their annual goals. The supervisor will document at that time an employee’s performance which is falling below a satisfactory level. The supervisor will be expected to continue to engage in ongoing dialogue with the employee to improve employee performance.

4. A supervisor’s merit pay is contingent upon completing performance evaluations and merit pay recommendations for their staff on time.

5. Human Resources will review all annual performance evaluations and merit pay recommendations to ensure consistency and integrity. Issues concerning the process will be communicated to ASC - PWC on an annual basis.

6. The annual merit allocation should be based upon the meritorious accomplishments over the most recent three-year period on a rolling basis, i.e., each year new information is added to the file for the most recent year and information for the oldest year is eliminated from the file. This will help to reduce inequities that can result from differences in the merit funds available each year and from fluctuations in performance that may occur from year to year.
MEMORANDUM

TO: Dr. Charles Middleton, Provost
   and Vice President for Academic Affairs

FROM: Joan C. Morgan, Chair
       Administrative Staff Council

       Joe Luthman, Chair
       Personnel Welfare Committee

Attached you will find the final draft of document titled “Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University.” This document has been discussed in two administrative staff committees throughout the Spring Semester: our Executive Committee and our Personnel Welfare Committee. In addition it has been presented and discussed at two Administrative Staff Council meetings. We would like you to review it and share it with the cabinet. We have scheduled a meeting with you on April 29 to discuss this document further and plan to take it to Administrative Staff Council, hopefully for a vote, on May 1. Duane Whitmire will also be attending the April 29 meeting.

We look forward to discussing this document further with you before it is adopted.

JCM/JoL/nm

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5. A merit system needs to establish a clear connection between employee performance and reward. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well as those types of achievements that surpass the unit's standard expectations.

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MEMORANDUM

TO: Dr. Charles Middleton
    Provost and Vice President
    for Academic Affairs

FROM: Joe Luthman, Chair
       Personnel Welfare Committee
       Joan C. Morgan, Chair
       Administrative Staff Council (ASC)

Attached is an updated draft of the merit system document dated 5/1/1997. Changes are in uppercase. One type of change reflects a modification of the connection between meritorious assessment and progression through a salary grade. This is now stated as a principle, without any specific dollar or percentage increase recommendations. The other change is the adoption of faculty language with respect to the allocation of varying amounts of merit raise percentages.

There is an explanation of recommendation (2b) included at the end of the document. We believe this compromise is a win-win situation for both administrative staff and the central administration.

We plan on submitting, discussing and voting on this document at the June 5 ASC meeting.

JCM/nm

attachment

pc: Joe Luthman
Principles and Recommendations for a
Performance-Based Merit System
for Administrative Staff at Bowling Green State University

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THE INSTITUTION SHOULD MONITOR AND ENSURE THAT EMPLOYEE SALARIES CONTINUE TO BE COMMENSURATE WITH INDIVIDUAL EMPLOYEE'S SKILLS, ABILITIES, AND EXPERIENCE.

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member.

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reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster
cooperation among staff, should reward groups and teams as well as
individuals for collaborative work performances, and should generate wide
support and general satisfaction on the University campus.

10. Both the performance based merit system and the performance
appraisal process will be reviewed annually by ASC.
Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to Administrative Staff members.

Recommendations

1. Each year the University should IDENTIFY, REVIEW AND ADDRESS EMPLOYEE SALARIES WHICH MAY BE INEQUITABLE, SUCH AS THE SALARIES OF THOSE INDIVIDUALS WHO ARE BELOW THE MIDPOINT OF THEIR SALARY GRADE. Funds should be made available on a regular, on-going basis TO CORRECT SALARY INEQUITIES, make market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary, and to support raises for promotions. These funds should not be considered a part of the annual merit pool.

2. TO ESTABLISH A CLEAR CONNECTION BETWEEN EMPLOYEE PERFORMANCE AND REWARD, MERITORIOUS PERFORMANCE SHOULD BE REWARDED IN TANGIBLE WAYS THROUGH: SIGNIFICANT PROGRESSION WITHIN A SALARY RANGE, RENEWING MULTIPLE-YEAR CONTRACTS, AND/OR PROMOTION AND MOVEMENT TO A NEW SALARY RANGE WHEN DEEMED APPROPRIATE.

   a. Upon the completion of five years of meritorious assessments, an employee's salary shall be REVIEWED AND increased TO FURTHER PROGRESSION THROUGH THE DESIGNATED SALARY RANGE. THE AMOUNT AWARDED WILL BE CONTINGENT UPON AVAILABLE INSTITUTIONAL RESOURCES.

   b. After five consecutive years of meritorious assessments, the employee shall be granted an annually renewable five-year contract with provisions for annual salary increases; THIS FIVE-YEAR CONTRACT WILL BE RENEWED ANNUALLY, SO LONG AS THE EMPLOYEE'S
ANNUAL PERFORMANCE CONTINUES TO BE RATED AS MERITORIOUS.

3. A merit system must be administered openly and reliably. Thus, changes in evaluation and merit pay criteria must be completed BEFORE the new contract year, i.e. before June 30 of the prior contract year. To ensure that employees can contest unfair merit assessments, TIMELY DISCLOSURES OF MERIT PERFORMANCE EVALUATIONS ARE necessary. Continual dialogue between the supervisor and the employee about progress towards goals is essential.

TIME DEADLINES
a. Performance appraisal forms must be completed by May 31 of the prior contract year.

b. MERITORIOUS ASSESSMENT must be known at the completion of the evaluation process. (May 31)

c. Merit criteria must be known prior to start of the next contract year.

Failure to meet any of items a-c defaults to the employee being awarded AT LEAST the average increase given to all contract staff. For e.g. in 1996, the default pay increase was 3%.

d. A supervisor will meet with employees between November 15 and January 15 for a dialogue on progress toward their annual goals. The supervisor will document at that time an employee's performance which is falling below a satisfactory level. The supervisor will be expected to continue to engage in ongoing dialogue with the employee to improve employee performance.

4. A supervisor's merit pay is contingent upon completing performance evaluations and merit pay recommendations for their staff on time.
5. Human Resources will review all annual performance evaluations and merit pay recommendations to ensure consistency and integrity. Issues concerning the process will be communicated to ASC - PWC on an annual basis.

6. The annual merit allocation should be based upon the meritorious accomplishments over the most recent three-year period on a rolling basis, i.e., each year new information is added to the file for the most recent year and information for the oldest year is eliminated from the file. This will help to reduce inequities that can result from differences in the merit funds available each year and from fluctuations in performance that may occur from year to year.

7. All employees will be evaluated in their annual performance reviews to determine their eligibility for merit. Merit eligibility is determined by the job performance of an employee, as assessed by the Administrative Staff Performance Appraisal Form. Performing one's job at a satisfactory level and in a competent manner is the basis for merit pay. Given that an employee will qualify for a merit increase be meeting, as well as exceeding, unit standards, it is expected that very few employees will fail to qualify for merit.

8. Any employee who does not qualify for merit in their annual performance review should not receive a salary increase. A professional development fund equal to the uniform percentage raise that would have been allocated to the individual, should be made available to the department or academic unit for employee development, with priority given to assisting employees who have failed to qualify for a merit increment.

9. If the total merit pool for salary increments in a given year is three percent (3%) or less, all employees who qualify for merit in their annual performance reviews will receive the same percentage increase in salary.
10. IF THE TOTAL MERIT POOL FOR SALARY INCREMENTS IN A GIVEN YEAR IS MORE THAN THREE PERCENT (3%) BUT LESS THAN FIVE PERCENT (5%), IT WILL BE ALLOCATED ACCORDING TO THE FOLLOWING GUIDELINES:

A. THREE PERCENT (3%) OF THE TOTAL SALARIES OF EMPLOYEES SHALL BE ALLOCATED AS A THREE PERCENT (3%) INCREASE IN SALARY TO ALL EMPLOYEES WHO QUALIFY FOR MERIT BASED ON THEIR ANNUAL PERFORMANCE REVIEWS.

B. THE REMAINING DIFFERENCE BETWEEN THE TOTAL MERIT POOL AND THE THREE PERCENT (3%) OF THE TOTAL SALARIES OF THE ADMINISTRATIVE STAFF SHALL BE ALLOCATED TO DEPARTMENTS AND UNITS FOR RECOGNITION OF THOSE EMPLOYEES WHOSE LEVEL OF PERFORMANCE EXCEEDS DEPARTMENT OR UNIT EXPECTATIONS AS DEFINED BY THE MERIT POLICY OF THE DEPARTMENT OR UNIT.

11. IF THE TOTAL MERIT POOL IS FIVE PERCENT (5%) OR MORE, IT WILL BE ALLOCATED ACCORDING TO THE FOLLOWING GUIDELINES:

A. SIXTY PERCENT (60%) SHALL BE ALLOCATED TO DEPARTMENTS/UNITS TO BE USED AS AN EQUAL PERCENTAGE INCREASE IN SALARY TO ALL EMPLOYEES WHO MEET DEPARTMENT/UNIT EXPECTATIONS AND THEREBY QUALIFY FOR MERIT IN THEIR ANNUAL PERFORMANCE REVIEWS.

B. FORTY PERCENT (40%) SHALL BE ALLOCATED TO DEPARTMENTS/UNITS FOR RECOGNITION AND REWARD OF THOSE EMPLOYEES WHOSE LEVEL OF PERFORMANCE EXCEEDS DEPARTMENT/UNIT EXPECTATIONS AS DEFINED BY THE MERIT POLICY OF THE DEPARTMENT/UNIT.
Recommendation (2b) Defense

b. After five consecutive years of meritorious assessments, the employee shall be granted an annually renewable five-year contract with provisions for annual salary increases; this five-year contract will be renewed annually, so long as the employee's annual performance continues to be rated as meritorious.

The premise here is that good things happen when consistently meritorious staff are rewarded with an extra measure of security.

The five-year protection can only be broken by a year in which a staff person does not receive a meritorious rating. At this point, the five-year contract becomes null and void, replaced by a one-year contract. Only after five more consecutive years of meritorious ratings could an administrative employee obtain another five-year contract.

What this clause does is to attach a heavy penalty to a bad year. Any one year in which an employee does not receive a meritorious rating results in, at best, a sequence of five one-year contracts. At worst, assuming the performance remains poor, the first one-year contract may be the employee's last.

It is worth noting here that health issues, or extended family problems can make even stellar employees go through periods of relatively poor performance. One should not assume that the absence of meritorious ratings for one year is always due to free will mediocrity.
MEMORANDUM

TO: Dr. Joan Morgan, Chair
    Administrative Staff Council

FROM: Charles R. Middleton
       Provost and Vice President

RE: Administrative Compensation Plan

Per your request I am writing to confirm our conversation at Tuesday's meeting regarding the administrative staff compensation plan. As we discussed, the administration is presently waiting for confirmation from the Department of Labor that the first phase of the administrative staff compensation plan is in compliance with current statutes. We had anticipated that by now that the University would have been notified by the DOL.

I cannot give you a firm date when this notification will be forthcoming. However, I have been assured that the DOL review is progressing in a timely fashion. Until the first phase of the compensation plan is approved by the DOL, it would not be prudent for the administration to proceed with further policy development because any changes would require re-submission to the DOL and might delay their review even more.

I confirm my commitment to developing an equitable compensation plan for all administrative staff. This is a top priority. I continue to be impressed with the collaborative relationship the administration has with the Council leadership and I look forward to building upon that relationship in the future.

skg

xc: President Ribeau
    Cabinet
May 2, 1997

MEMORANDUM

TO: Dr. Charles R. Middleton, Provost and Vice President

FROM: Joan C. Morgan, Chair
Administrative Staff Council

RE: Administrative Staff Salary Recommendations

Attached is the report of the Salary Committee of Administrative Staff Council. The salary recommendation of Administrative Staff Council is contained in this report under point four on the first page. If you have any questions about this recommendation, please contact me or Gene Palmer, the Chair of Administrative Staff Council's Salary Committee.

JCM/nm

attachment
MEMORANDUM

To: Administrative Staff Council
FROM: Salary Committee
RE: 1996-97 CUPA Results

The ASC Salary Committee has received, reviewed and summarized information from the 1996-97 College and University Personnel Association (CUPA) salary survey. This review and summarization is consistent with analysis performed in previous years. One new analysis based on Mercer groups is provided.

1. BGSU average salaries, when compared to the average salaries of eleven Ohio institutions, ranks BGSU in seventh position. This rank has varied between position five and position ten over the past seven years with an average rank of 7.4.

Kent State, Miami University, Ohio University and Toledo have usually ranked higher than Bowling Green over the past seven years.

Ref.: Appendix B / Appendix B.1

2. BGSU salaries when compared to the average salaries of the eleven Ohio universities trail by 3.92%. When compared to Kent, Miami, Ohio U. and Toledo BGSU trails by 4.38%.

Ref.: Appendix A

3. The CUPA analysis is based on 93 ASC positions at BGSU. 87 of these positions are in Mercer grades fourteen or higher. Average salaries for these 93 positions are usually above the midpoint for their respective Mercer grade. This report provides no insight for Mercer positions below grade fourteen, gender/ethnic issues or time in position.

Ref.: Appendix C

4. We believe BGSU salaries should be at a level consistent with Kent/Miami. To become a reality this will require an equivalent salary increase to that of Kent/Miami plus an additional 3.32% to equal Kent or an additional 3.32% to equal Miami. Providing salary increases higher than Kent and Miami over the next several years would have the same result.

Ref.: Appendix B

This report does not address any issues concerning merit pay or increases advancing a person within their Mercer group. These issues are being addressed by the Personnel Welfare Committee.
## Appendix A
1996-97
Summary of CUPA - BGSU Average Salary Compared to State Average

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<tr>
<th>Version</th>
<th>BGSU # of Cases</th>
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Appendix B
1996-97
Summary of Comparison of BGSU Salaries
to Other State Schools Using Common Positions
(MV 2.1)

<table>
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<tr>
<th>School</th>
<th># of Positions</th>
<th>Average Salary</th>
<th>BGSU Average Salary</th>
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Appendix B.1
Summary of Comparison of BGSU Salaries to Other State Schools Using Common Positions (MV 3.1)

### Seven Year Comparisons 1990-1991 to 1996-1997

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### Ranking

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<td>5</td>
<td>7</td>
<td>11</td>
<td>7</td>
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| AVG Rank | 1.0 | 2.1 | 3.0 | 5.1 | 5.3 | 5.3 | 6.7 | 7.4 | 7.9 | 9.0 | 9.0 | 9.0 | 9.4 |

Appendix B.1 - 1996-1997 Page 1
### Appendix C: 1996-1997

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**Mercer Grades**

- **Mercer Min**
- **Mercer Max**
- **CUPA Average**
May 12, 1997

MEMORANDUM

TO: Dr. Charles Middleton, Provost and Vice President for Academic Affairs

FROM: Joan C. Morgan, Chair
Administrative Staff Council

Attached you will find the report of the Administrative Staff Task Force that reviewed the Report and Recommendations of the Task Force on Family Medical Leave Policy.

The administrative staff review process provided support for the Family Medical Leave Policy adopted by the University Task Force. Definite recommendations regarding issues that need further study were also made. These issues include the development of a policy for catastrophic leave, domestic partners, and fee waivers for part time staff.

A copy of the ASC Ad Hoc Committee on Benefits Report is attached. Please let me know if you have any further questions regarding this report.

JCM/nm

attachment
April 29, 1997

Memorandum

To: Joan Morgan, Chair
   Administrative Staff Council

From: ASC Ad Hoc Committee on Benefits
       Pat Green, Chair
       Ann Bowers
       Ed O'Donnell
       Donna Wittwer

The ASC Ad Hoc Task Force on Benefits has reviewed the proposed FMLA policy and other benefit issues raised by the Task Force appointed by Provost Middleton and chaired by Bob Holmes, (hereafter called Task Force), or by administrative staff members. Since this ad hoc task force is on a very short time line, and since some of the issues will require extensive study, we have made definite recommendations where possible and recommended, where appropriate, other task forces representing all constituent groups be established as defined below. Following are our recommendations:

FMLA
The Ad Hoc Committee on Benefits supports the Family Medical Leave Policy adopted by the Task Force. An especially important element of the policy is that if both spouses are employed by the University, they are each entitled, if eligible, to 12 weeks of leave.

Concern: Other forms of leave in the administrative and classified handbooks seem confusing and at times contradictory.

Recommendation: The Benefits Office, in conjunction with constituent groups, should examine all leave policies for contradictions and to assure they are equitable for all groups. Also, guidelines should be developed clarifying how other leave policies will work in conjunction with FMLA. This should be coordinated by Donna Wittwer in the Benefits Office.

Catastrophic Leave
This is a very complex issue and is handled in many different ways on campuses where such a policy exists. Donna Wittwer, benefits manager, has been asked by Bryan Benner to research policies at other universities.

Recommendation: A joint task force of all three constituent groups be convened to examine this issue only and develop a policy for the administration and Board of Trustees to consider next year. It is further recommended that Donna Wittwer be an ex officio member of the task force as a resource and as liaison to Human Resources.

Domestic Partners
This is a very sensitive topic which also needs careful examination by a separate task force. The first topic to be addressed would be establishing the definition of domestic partners. To our knowledge Ohio State has a policy involving domestic partners. It allows employees to use sick leave to take care of a domestic partner provided there is demonstrated evidence of financial commitment.

Recommendation: A joint task force of all three constituent groups research this issue and make a recommendation to the administration and Board of Trustees next year. It is once again recommended that Donna Wittwer be an ex officio member of this task force.
Administrative Staff Maternity Leave
Administrative staff maternity leave should be increased from 4 to 6 months for consistency with classified staff.

Recommendation: The Ad Hoc Committee on Benefits agrees with the Task Force's recommendation to increase maternity leave for administrative staff to six months. In addition, the Nat Birth/Adoption Policy, (appended) approved by Administrative Staff Council in January, 1995 should be adopted to reflect language for both male and female parents with the following change: wherever paternal is used birth/adoptive leave should be substituted. Similar leave policies should be developed for classified and faculty.

Definition of Family Members
The definitions of immediate family should be consistent for all groups. Currently, classified staff has grandchild as a family member, while the other groups do not.

Recommendation: The Ad Hoc Committee on Benefits agrees with the Task Force. Grandchild should be included in all groups.

Fee Waivers for Part-time Staff
Part-time faculty have only recently received fee waivers for themselves (September 1996). They are pro-rated as they are for part-time administrative and classified staff. There are no dependent fee waivers for any group.

Concern: Part-time administrative staff have expressed concern over part-time benefits for a number of years.

Recommendation: Part-time employees from all constituent groups form a task force to examine all part-time benefits with equity for all groups.

Dependent Fee Waivers for Retired Administrative and Classified Staff
Currently when faculty retire, if they are awarded emeritus status (most are), they have the same benefits as if they were still full-time including an indefinite time frame for fee waivers for qualified dependents. If they are not emeritus, and go on SRP, they are entitled to fee waivers for the three years they are on SRP. Currently, administrative and classified staff have dependent fee waivers for five years after retirement.

In the event of the death of the employee, however, the widow/widower and dependents have fee waivers for an unlimited number of years (all groups).

Recommendation: All groups have indefinite fee waivers for dependents if they have been employed for at least 10 years.

Concern: These fee waivers would be available only to eligible dependents. Eligibility must be clearly defined.

Sick Leave for Staff Compared to Faculty
If a faculty member is sick and has a colleague substitute, he/she does not use sick leave. If payment is made to a substitute, then sick leave is deducted. This committee thought it unlikely that classified or administrative employees could find qualified substitutes to perform their jobs when sick. This is clearly a policy that can easily apply to faculty but not to staff.

Concern: At issue here seems to be standardization of flex time. While policies exist for all groups regarding flex time, interpretation and use of flex time is not standard. Some offices will not allow any, while others are very accommodating.

Recommendation: The Benefits Office should review all flex time policies and make sure the policies are equitable and being carried out properly across campus.

Fee Waivers at MCO
Currently only faculty have fee waivers available at MCO.

Recommendation: All staff have fee waivers at MCO.
NATAL (BIRTH/ADOPTION) LEAVE

1. Each staff member is eligible for natal (change to birth/adoption) leave up to six months.

2. The six month leave need not be taken as consecutive days if mutually agreeable to the administrative staff member and the immediate supervisor.

3. Accrued sick leave, accrued vacation credit and a leave of absence without pay can be used during this six month period. A staff member may use any or all of the accrued vacation credit and/or accrued sick leave or personal leave before going on a leave of absence without pay.

4. A staff member will notify, in writing, the supervisor and the Office of Personnel Services (Human Resources), prior to the start of the leave, as to the number of days to be taken as sick leave, the number of days to be taken as vacation and number of days to be taken as a leave of absence without pay.

5. Should a staff member decide not to return to the University following leave, the staff member must notify the supervisor, in writing, no less than 30 calendar days preceding the scheduled return to work.

6. Staff members taking leave are guaranteed their positions and job title upon return. If these proposed changes are adopted, then the section on Paternity/Adoption Leave would be deleted from page 43 of the current handbook.

Adopted ASC 1/19/95
June 4, 1997

MEMORANDUM

TO: Les Barber, Executive Assistant to the President
FROM: Joan C. Morgan, Chair
RE: New Administrative Staff Officers

The 1997-98 Chair of Administrative Staff Council is Duane Whitmire, and the new Chair-Elect is Deborah Boyce from University Advancement.

JCM/nm

pc: Duane Whitmire
MEMORANDUM

TO: Norma Stichter, Director Academic Services
    Academic Affairs

FROM: Joan C. Morgan, Chair
    Administrative Staff Council

RE: FMLA Modifications

Thank you for meeting with us on June 4 regarding the final FMLA Policy document. Administrative Staff concerns with the changes discussed are listed below.

1. Delete superior in the first sentence.

2. Leave in the phrase or the care of an employee's child in section I.A.

3. The editorial change in Section VI. part B is acceptable.

4. The last change regards section G, Other Provisions. Section 7 should be modified. The phrase not to exceed one semester should be deleted, and the following sentence added at the end of this section. "The interim assignment would be reviewed with the employee after five months for either an extension of the original assignment or for a reassignment."

If you have any questions about the recommendations of Administrative Staff regarding these changes, please give me a call.

JCM/nm
July 7, 1997

Memorandum

TO: Dr. Charles Middleton, Provost and Vice President for Academic Affairs
FROM: Joan C. Morgan, Past Chair Administrative Staff Council
RE: 1996-97 Administrative Staff Council Annual Report

Chuck, the past year was a good one for Administrative Staff Council. I think the groundwork was laid with your assistance for bridging the communication gap between the Administration and Administrative Staff. Monthly meetings with you and the interim Director of Human Resources laid the foundation for the beginning of collaborative efforts that will positively impact the welfare of administrative staff. I hope that these meetings will continue in the future.

A brief summary of the progress made towards meeting the 1996-97 goals follows.

1. TO CONTINUE TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF CONCERNING THE POSITION ANALYSIS AND COMPENSATION STUDY.

Provide support for administrative staff concerning the position analysis and compensation study. Progress made. Administrative Staff Council leadership continued to be advocates for administrative staff experiencing problems with this study. One concern relates to several appeals that are still unresolved.

Pursue the articulation and implementation of clearly defined policies/procedures for dealing with wage related issues such as market adjustments, promotions, equity adjustments, gender inequities, and moving through the salary levels associated with the Salary Compensation Plan. Little progress made. These are issues that will continue to be priorities with Administrative Staff Council and plans are being made to deal with these in 1997-98.

Address issues related to increased workloads. Such issues include the feasibility of using alternate means of compensation or recognition. No progress made.
2. TO CONTINUE TO PARTICIPATE IN THE DEVELOPMENT OF A PERFORMANCE EVALUATION PROCEDURE WHICH PROVIDES AN EQUITABLE ASSESSMENT OF PERFORMANCE FOR ALL ADMINISTRATIVE STAFF MEMBERS.

Continue to develop both merit and across the board salary guidelines and procedures. Goal accomplished. A performance appraisal form is being used for all administrative staff members this spring. This form will provide the foundation for discussions regarding job performance between administrative staff and their supervisors. Although a form is now in place, it is anticipated that this form will be revised as the need arises. Discussion between the Administration and Administrative Staff Council should continue as the performance evaluation process develops.

3. TO CONTINUE TO OFFER AND EXPAND EXISTING ADMINISTRATIVE STAFF PROGRAMS THAT WILL ENHANCE OPPORTUNITIES FOR BOWLING GREEN STATE UNIVERSITY.

Increase the corpus of the Administrative Staff scholarship to $40,000. Progress made. Although the corpus was not increased to $40,000, Administrative Staff Council was able to secure $5000 in matching funds from the Alumni Foundation. A major 18 month fund raising initiative will begin during the summer months.

Assess and continue to offer the administrative staff mentoring program Bowling Green EFFECT for new students entering the University. Goal achieved. The BG EFFECT program was made available for new students entering the University in January and in the Summer. During the Spring semester it was decided to formally move the program into the First Year Experience Program. The institutionalization of this program will ensure that the mentoring program started by Administrative Staff Council will become a viable retention program for new students at the University.

4. TO BE AN ADVOCATE FOR ADMINISTRATIVE STAFF MEMBERS AND THEIR CONCERNS AND NEEDS RELATED TO THE UNIVERSITY’S HEALTH BENEFIT PLANS.

Continue to have representation on the Health, Wellness and Insurance Committee of the Faculty Senate. Goal accomplished. Three administrative staff members represented administrative staff on this committee.

Participate in and promote the development of Wellness programs for all university employees. Goal accomplished. Administrative Staff Council participated in and promoted Wellness programs on campus.
5. TO CONTINUE TO BE AN ADVOCATE FOR AND TO OFFER PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR ADMINISTRATIVE STAFF.

Seek to establish a paid leave of absence policy for administrative staff. No progress made.

Seek to reestablish an ASC professional development fund. The goal for this fund is a total of $10,000. No progress made.

Continue to participate in the Professional Development Institute. This was the last year for the Professional Development Institute.

Continue to collaborate with existing programs and offices that develop and offer professional development programs for university employees. No progress made. No volunteers were found to chair the Professional Development Committee.

6. SECURE AN OVERALL SALARY AND BENEFITS PACKAGE THAT RANKS BGSU'S ADMINISTRATIVE STAFF IN THE FOURTH POSITION AMONG PUBLIC UNIVERSITIES IN THE STATE OF OHIO.

Goal not accomplished.

7. CONTINUE TO DEVELOP AND IMPROVE COMMUNICATIONS AND PUBLIC RELATIONS AMONG ADMINISTRATIVE STAFF.

Continue the development of network capabilities. Goal accomplished. Various mailing lists were developed to help improve communication with both ASC committees and representatives.

Improve communication with administrative staff members who do not have connections to electronic mail. Some progress made. ASC representatives are responsible for communicating with all the people they represent and get hard copies of materials to those who do not have access to electronic mail. This did not happen in all instances and representatives need to make sure they communicate with all of their constituents.

Develop a public relations brochure for newly hired Administrative Staff. Goal not accomplished. The Internal Affairs Committee updated the Orientation Handbook and distributed it to newly elected SAC members; however, was unable to develop a brochure for newly hired Administrative Staff members.

Continue to distribute e-mail updates to administrative staff. Goal accomplished.
Development of a list serve to send minutes from Administrative Staff Council meeting to all administrative staff members with e-mail capabilities. Goal accomplished. Minutes from Council minutes were distributed by e-mail and hard copies were distributed to Council representatives to give to their constituents who do not have access to e-mail.

8. CONTINUE TO COLLABORATE WITH BOTH THE FACULTY SENATE AND CLASSIFIED STAFF COUNCIL ON ISSUES OF COMMON CONCERN.

Continue to have representation on the day care policy committee. Goal accomplished.

Personnel Welfare Committee (PWC) chairs from each constituent group will meet regularly regarding the benefit issues. The Chairs and Chair-Elects of the three constituent groups met regarding the FML policy and other benefit issues that were of common concern so this goal was accomplished even though it was not done by the Chair of our PWC.

Advocate the implementation of an early retirement program for administrative and classified staff. Although ASC leadership advocated for the implementation of an early retirement program for staff, the University's decision to phase out the ERIP for faculty resulted in a decision to not offer such a program for staff at this time.

Collaborate with Faculty Senate and Classified Staff Council in the development of the University community's strategic planning process. Goal accomplished. This year a Constituent Caucus made up of the leadership of all constituent groups on campus met on a regular basis to discuss issues of common concern. Collaboration of this type is important if the University is to move towards becoming a premier learning community.

9. CREATE A HOME PAGE FOR ADMINISTRATIVE STAFF COUNCIL THAT WOULD ENABLE US TO COMMUNICATE WITH GROUPS SIMILAR TO ADMINISTRATIVE STAFF COUNCIL ON OTHER CAMPUSES.

Some progress made. An ASC Web page is currently under construction.
March 31, 1997

MEMORANDUM

TO: Deans
     Vice Presidents
     Hal Lunde, Chair, Faculty Senate
     Joan Morgan, Chair, ASC

FROM: Charles R. Middleton
       Provost and Vice President

RE: Committee on Dual Career Couples

Attached you will find a copy of the report of the Committee on Dual Career Couples which has completed its work and submitted several recommendations to me for my consideration. In order for these recommendations to receive wider discussion in the faculty and administrative staff, I am forwarding this document to you at this time. I ask that you and your colleagues review it thoroughly. I anticipate discussing it with you after you have had an opportunity to conduct that review.

Thank you for your assistance in developing a policy that will assist the University in the recruitment and retention of faculty and administrative staff who have the unique needs of the modern dual career couples.

Enclosure

cc: President Ribeau (with enclosure)
    Dual Career Couples Committee Members
MEMORANDUM

March 12, 1997

To: Charles R. Middleton
    Provost and Vice President

From: Committee on Dual Career Couples
      Peggy Giordano, Sociology (Chair)
      Marvin Belzer, Philosophy
      John Hayden, Mathematics and Statistics
      Beth Jakob, Biological Sciences
      Naomi Lee, Technology
      Mary Ann Roberton, HPER
      John Sampen, Performance Studies
      Norma Stickler, Provost/VPAA Office
      Paul Yon, Center for Archival Collections

Re: Recommendations of the Committee

The members of the dual career couples committee are in agreement that Bowling Green State University needs to be more supportive and proactive regarding the needs of dual career couples. Increasingly, considerations about seeking and accepting employment have involved decisions concerning two careers. The committee analyzed written materials, brochures, and policy statements of other universities which have developed programs designed to address concerns of dual career couples. We also interviewed personnel at several institutions (Purdue, Oregon State, Minnesota, Nebraska, Arizona, and Pennsylvania State) who are involved with these programs. The interviews were designed to elicit more information about the scope of each university's program, the types of individuals served, and the perceived impact/success of each program. We also attempted to determine whether there had been any negative consequences stemming from the implementation of these programs. Finally, the committee reviewed recommendations of an earlier (1989) BGSU committee which had received a similar charge.

The interviews with other institutions suggested that these types of programs can be successful. The programs varied widely and received differing levels of financial/personnel support, but it appeared that a critical variable relating to a program's success was the active encouragement and support of top-level administrators. Given your own assessment regarding the desirability of developing specific strategies in this area, and the enthusiasm of staff at these other institutions, the committee is encouraged about the potential of a dual career program at BGSU.
RECOMMENDATIONS OF THE COMMITTEE ON DUAL CAREER COUPLES

RATIONALE

To become more responsive to the needs of today's university employees, the Committee on Dual Career Couples recommends that Bowling Green State University institute a policy to accommodate the unique employment concerns of career couples. Such a policy would serve to strengthen BGSU's recruitment potential and increase the likelihood of attracting the most qualified applicants for future positions. Further, by alleviating the transitional stress of worrying about partners' career opportunities, such a policy would contribute to the optimal performance of recently hired personnel.

Not only would such a policy be an advantage in the recruitment of new faculty and administrative staff, but it could also serve to retain those employees who might otherwise choose to leave. Having both partners employed in meaningful work decreases the incentive to look elsewhere for employment.

In addition to the benefits to the individual employees involved and the departments that recruit them, the university as a whole benefits from the positive affirmative action statement made by this policy. BGSU is more likely to attract female candidates if they know that the partner's search for employment will be facilitated. Similarly, by assisting the search of female partners of male candidates, we potentially increase the number of women on campus. In both instances we have made a positive move in the balance of male to female faculty and administrative staff members.

SCOPE OF THE PROGRAM

1. The Committee recommends that BGSU implement a program designed to assist and support the employment search of partners of recruited faculty or administrative staff. Although some university programs provide an array of other services (e.g., assistance with the search for housing), Committee members agreed that the primary emphasis should be placed on the employment concerns of the accompanying partner.

2. The Committee concluded that the program should emphasize partners of newly recruited faculty/administrative staff. However, the partners of existing employees may also benefit from these services on a case by case basis as resources permit. Thus, the program ideally would enhance our efforts with regard to both recruitment and retention of outstanding BGSU faculty/administrative staff. Given the limited resources likely to be available, the Committee suggested further that partners of graduate students or classified staff would not be included within the program's scope.

3. The services of this program should be open to partners as they are defined by the recruited faculty member or administrator. Therefore, terms such as "spouse" or "family" should be avoided, and more inclusive language should be adopted for use in connection with the program (e.g., couple or partner).

4. Employers within BGSU or the extended business community will not be asked to create positions that do not support the University or department's mission or hire those who are unqualified. Employers will not be asked to change hiring policies and will retain the right to make their own decisions.
NATURE OF THE PROGRAM

A position of Coordinator of the Dual Career Program should be created and funded. At several institutions (e.g., Purdue, Nebraska) this has consisted of a 1/2 time position and appropriate clerical support. At the University of Minnesota a graduate student (from Counseling or a related area) was also assigned to work closely with the program coordinator. Our program should have a close connection with the Office of Academic Affairs (in terms of the physical location of the program and/or the reporting hierarchy). The Committee felt that this arrangement would have a symbolic value in enhancing the perceived legitimacy of the new program and its Coordinator; however, even aside from such considerations, Academic Affairs is likely the most appropriate unit.

The Program Coordinator will need to develop strategies to assist two different types of partners: a) partners who wish to obtain a position at BGSU and b) partners who seek other types of employment (e.g., in business, law, primary/secondary education or at another university). Interviews with staff at other universities suggest that a majority of the partners of new hires involve the second type of employment. Some activities of the Coordinator will apply in either type of situation, but there are some issues unique to each type:

Off-campus Positions

The Dual Career Program should be an important resource for the professional partner seeking non-academic employment. The Coordinator, as external liaison, should develop a network of formal and informal contacts so as to be prepared to match professional expertise with organizations, businesses, schools, and agencies in the region. The formal contacts could build on existing programs such as the "Relocation Assistance To Spouses" program developed by the Employers Association of Toledo. The importance of informal networks was also emphasized repeatedly in our interviews. These networks include alumni, University personnel with unique external relationships (e.g., faculty in the College of Education who can assist in partners' searches for teaching positions in elementary/secondary education), and networks of peer professionals. Using the network, the Coordinator will initiate correspondence with appropriate agencies, distribute resumes, and assist in arrangements for the partner to interview with identified potential employers. In addition to this critical networking role, the Coordinator may also direct the partner to other campus resources/services (e.g., Jerome Library's Center for Career Resources). The Coordinator should develop a thorough understanding of these other resources, in order to avoid duplication of effort. We recommend that the Dual Career Program should continue to offer support in career planning and placement services for a period of time (e.g., one year) after the couple has relocated to Bowling Green.

It is also important that BGSU attempt to establish creative relationships with business, governmental agencies and other universities that will increase the probability of finding or developing suitable employment for partners. An example: a person might work 1/2 time as an adjunct professor at BGSU and 1/2 time for Wood County or the City of Perrysburg on problems associated with rapid population growth. Creative affiliations of this type, which can be established only if we build the necessary relationships within the community and then aggressively pursue and support the development of path-breaking jobs, also would establish valuable external affiliations for BGSU within the community.

On behalf of academic partners seeking employment outside of BGSU, we recommend that the University President, Provost, Deans, and the Program Coordinator attempt to establish innovative reciprocal relationships with other Universities and Colleges in the region. These relationships will increase the probability that an academic partner will be successful in finding suitable employment...
when placement at BGSU is not feasible. Such relationships no doubt will be even more complicated than those involving different units on campus. Nonetheless, we believe that BGSU should lead in aggressively attempting to establish such relationships with the institutions within commuting distance, including the University of Michigan, Eastern Michigan University, the University of Toledo, the Medical College of Ohio, and the smaller universities and colleges in the region.

On-Campus Positions

The successful coordination of a recruitment effort involving two University positions is complicated and difficult to accomplish "politically." Nevertheless, if we become more responsive and proactive in this regard, we could greatly enhance BGSU's ability to attract and retain outstanding faculty and administrative staff. Therefore, the Committee favors the idea of devoting increased attention to the employment concerns of the accompanying partner, but believes that in these cases the active support of chairs, relevant deans and the VPAA will be required. In addition, to facilitate such hires, constituent leaders should attempt to educate the existing employees about the general desirability of working together across units. It is necessary to change norms and attitudes as well as to implement specific procedures which ensure that such cases are handled in an equitable manner.

Some incentives and resources are needed if this aspect of the program is to be successful. University units value their decision-making autonomy and do not wish to give anything up in order to facilitate another unit's hiring activities. Therefore, the unit involving the partner must first make a decision about the qualifications and areas of expertise of the partner. If it is determined that the candidate has outstanding qualifications which fit well with that department's long term goals and objectives, one of several strategies could be implemented, depending on the circumstances involved:

1. Regular Positions. At some universities (e.g., Kansas) several positions are "held back" at the Provost level with the expectation that these may be needed to facilitate dual career hires. Another strategy would be to examine a given department's retirement patterns. If one or more retirements are likely to occur within a reasonable period of time, the VPAA could fund the partner on a temporary basis, until such time as a position is made available through retirement or resignation.

2. Bridge Funding. Every potential faculty member would like a secure, tenure-track position; however, the University may be able to provide some level of assistance/employment short of this. A Faculty Fellowship program could be implemented. For example, the University of Nebraska-Lincoln offers a one-year stipend of $15,000 plus benefits to its faculty fellows. These are funded 2/3 by the Dual Career office and 1/3 by the relevant Dean. This would be a relatively low-cost way of providing a home base to the partner, as well as a degree of academic legitimacy. The University of Minnesota has also developed a program designed to provide bridge funding for the accompanying partner. They fund the partners at a level commensurate with their qualifications, and gradually reduce this amount over a 3 year period. Bridge funding allows partners a longer window of opportunity in which to secure employment--either with the initial "home base" or elsewhere.

3. Other Options. Department chairs should be open to discussions regarding the availability of laboratory and/or office space, temporary teaching assignments, or to exploring other ways in which their department can facilitate the partner's employment needs. It is recognized that these will not always be available, but it is very important to communicate with the partner about any short or long term prospects for employment. If the chairs and directors could receive some funds from their Dean or the VPAA for these purposes, they would obviously have additional motivation to work something out.
Other Recommendations for Implementation

1. Advertisements for positions should state that Bowling Green State University is responsive to the needs of dual career couples. This initial statement "opens the door" early for faculty to discuss issues that may relate to their partner's employment needs. This will allow Bowling Green adequate lead time to assist partners in finding employment as quickly as possible.

2. A brochure describing the services offered to dual career couples should be developed and sent to candidates as soon as possible during the hiring process. This is another way to facilitate an early discussion of these issues.

3. Information about the Dual Career Program should be available on University and department web pages.

4. The above suggestions should be discussed with faculty and administrative staff (e.g., Faculty Senate and Administrative Staff Council) in order to get additional ideas and input.

5. The program will undoubtedly go through several phases. Initially, some attention will need to be directed to dual career issues facing current faculty; eventually the emphasis should shift to new hires. In addition, personnel at other universities noted that it takes time for networks and effective contacts to develop. Therefore, the program should not be abandoned after a short period if it is not immediately successful in all instances.

6. We recognize that not all dual career issues can be solved through the use of one of the above-mentioned suggestions. Although such strategies as shared positions (or 1/2 times positions; leaves without pay) are beyond the scope of the current committee, there is a real need to become more open to the creative use of faculty and staff lines/resources in order to attract and retain the best personnel.
Mary Beth,

This is the material that was sent out electronically.

The word "Swat" will come out under the 4th recommendation in the Learning Community section.

The phrase "new non-traditional" student under the 13th recommendation in the Outreach Community section will be added.

The above two changes are based on the e-mail feedback we received prior to yesterday's meeting.

If you need anything else, just let me know.

Deanne
Memorandum

May 24, 1996

To: ASC-Representatives Who Are Not On The ASC-REPS Electronic Mailing List

From: Deb Boyce, ASC Focus Group Analysis Team
Jeff Grilliot, ASC Focus Group Analysis Team
Inge Klopping, ASC Focus Group Analysis Team
Duane Whitmire, ASC Focus Group Analysis Team

Re: Getting Feedback from Administrative Staff Members Regarding the Draft of the Analysis of the Administrative Staff Council Building Community Focus Groups Discussion

During its April meeting, Administrative Staff Council conducted focus group discussions on how administrative staff could enhance the learning, collaborative, diverse, and outreach communities identified by President Ribeau.

Volunteers were sought from the ASC Executive and Personnel Welfare committees to analyze the results from the focus groups by using the same format as the University Building Community Report which includes issues, recommendations, and representative quotes. Specifically, Deb Boyce, Jeff Grilliot, Inge Klopping, and myself have been working on the analysis.

Because the ASC Building Community Focus Group Report will be shared with President Ribeau and others, we are asking that you share a copy (either electronically or hard copy) of the draft report with the administrative staff members you represent for the expressed purpose of providing feedback by May 31st. Feedback may be sent via e-mail to whitmire@bnet.bgsu.edu or in hard copy format by sending it to Duane Whitmire in 102 Hayes Hall.

The draft of the report entitled "ASC Focus Group Discussions of the Learning, Collaborative, Diverse, and Outreach Communities" is attached. Please note two items in the report that we hope will move us from a "talking" mode to a "doing" mode. Specifically, note the action items that have been identified in the recommendation sections of the four topics, and also note that the persons identified as "champions" will hopefully accept ownership and follow through on the action items presented.

The ASC Focus Group Analysis Team will compile feedback and present the final results at the June 6th ASC meeting. The final report will be shared with all administrative staff, Dr. Ribeau, and others.
Draft of ASC Focus Group Discussions of the Learning, Collaborative, Diverse, and Outreach Communities

Prepared for
Administrative Staff Council Representatives Who Are Not on the ASC-REPS Electronic Mailing List

Prepared by
Deb Boyce
Jeff Grilliot
Inge Klopping
Duane Whitmire

Date
May 24, 1996
Discussion of this topic centered on minimizing the bureaucratic burden that students encounter outside of the classroom environment. Specific recommendations related to streamlining processes for students by creating a one stop customer care center were made. Numerous issues and recommendations were raised, but there was no attempt to correlate specific issues with specific recommendations.

- Bureaucratic burden students face outside the classroom

"Students' input is not valued"

- Administrative staff need to be more sure of what the common goals of the University are so they can be more part of the learning community

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• Administrative staff must handle as many problems one-on-one without referral to others. Recommend that the new Manager of Training in Human Resources develop a Constituent Groups Training Team with representation from all five constituent groups for the expressed purpose of developing training experiences that lead to ownership of problems.

• Work toward streamlining procedures by providing the support and tools necessary for success in the job (e.g. a one stop customer care center). Create a Team of Academic, Administrative, Student Life, Computer Services Personnel, and students to develop a possible one-stop customer care center, and identify "champions" who will follow through to see that the center becomes reality.

• All administrative staff must assume ownership of the person and the problem. See the first recommendation.

• Reevaluate our procedures and policies to see if they are “office” or “student” oriented. Develop an ASC SWAT Team that will analyze and make recommendations in at least three administrative offices a year for the expressed purpose of making sure that office policies and procedures are student-oriented.

• Cross-training is needed within and among areas. Have the Manager of Training and the Constituent Group Training Team with representation from all five constituent groups design training programs that foster communication and training among various areas of the University.

• Revise the current budget process to support learning activities. Recommend that the President, the Vice President for Planning and Budgeting, and a team of budget administrators examine the budget process for the expressed purpose of rewarding those areas that are successfully conducting learning activities.
Discussion of this topic focused on eliminating barriers to collaboration; building trust; opening communication channels; and creating a budget process that fosters collaboration. A specific recommendation was to develop suggestions (e.g., a Constituent Groups Collaborative Action Team) that can generate collaboration across campus. Numerous issues and recommendations were raised, but there was no attempt to correlate specific issues with specific recommendations.

- Barriers exist between constituent groups
  
  "You can't collaborate with someone you don't know"

- Barriers exist within areas of the University
  
  "We must 'bust' the bureaucracy"

  "Top-down administration has had a divide and conquer mentality"

- A customer-service orientation is lacking with students and with members of the University community

- Areas are not able to effectively support other areas on campus

- The budget allocation process is dysfunctional

- There is a lack of an institutional strategic plan that will bring us all together

- Develop “traditions” that bring people together. Recommend that a Constituent Groups Collaborative Action Team (or Teams) with membership from Faculty Senate, Administrative Staff Council, Classified Staff Council, Graduate Student Senate, and Undergraduate Student Government be formed to look into developing such traditions.

- Information must be shared among constituent groups. Expand the use of electronic mail and the world wide web as a means of sharing information and identify “champions” who will follow through to see that information is shared.

- Ask all constituent groups what their needs are for the purpose of developing collaborative strategies among the groups. Have the Constituent Groups Collaborative Action Team (or Teams) conduct a feasibility study within each group to identify needs for collaboration.
• **Departmental/area procedures which create barriers to work flow need to be removed.** Recommend to the President and to the Vice Presidents to have collaboration and cross-functionality within their areas as a goal for the 1996-97 academic year. Furthermore, we recommend that one way to accomplish the goal is to identify “champions” within the Presidential and each Vice Presidential area for the expressed purpose of breaking down barriers to collaboration.

• **Create Administrative Staff Teams to develop and implement action plans for streamlining University-wide policies and procedures on a continuing basis.** Create an ASC Action Team to proactively examine policies and procedures of “key areas” (to be identified by the Action Team) with the intent of streamlining processes.

• **Action plans need to be developed for areas to support and promote other areas on campus.** Have the Constituent Groups Action Team identify common bonds which would promote support among all areas of the University.

• **Build respect and trust.** ASC must take a leadership role in developing concrete actions that would foster interdependence among the various groups on campus leading toward respect and trust.

• **The whole budget process needs to be reviewed.** Recommend follow-up by the President, Vice President for Planning and Budgeting, and a team of budget administrators who would identify specific ways to make the budget process more collaborative.
Administrative Staff Council - Focus Group
Diverse Community
Key Issues Raised

Discussion of this topic concentrated on raising the level of awareness and sensitivity of all University employees in terms of diversity concerns. A specific recommendation designed to promote diversity sensitivity training was proposed. Numerous issues and recommendations were raised, but there was no attempt to correlate specific issues with specific recommendations.

- Students do not mix with each other
- The level of diversity awareness of faculty and staff needs to be raised
- More minority students are needed on campus

"We need to recruit quality minority students, but this is difficult because other universities devote more resources to attracting quality minority students."

Administrative Staff Council - Focus Group
Diverse Community
Recommendations

- **Develop a diversity sensitivity training program for administrative staff and others.** Recommend that the Manager of Training in Human Resources work with the ASC Professional Development Committee to implement the diversity training program.

- **Identify means whereby staff can interact more with minority groups.** Create an ASC Team to work with Multicultural Affairs for the expressed purpose of developing mechanisms whereby staff can interact with minority groups on campus.

- **Increase attendance at minority group functions.** See the previous recommendation.

- **Create an environment that embraces diversity by providing resources for recruiting and retention efforts for faculty, staff, and student positions.** Recommend that the President develop a specific plan with appropriate resources in conjunction with Faculty Senate, Administrative Staff Council, Classified Staff Council, Undergraduate Student Government, and Graduate Student Senate to recruit and retain minority faculty, staff, and students.

- **Revise the current budget process to support diversity activities.** Recommend that the President, the Vice President for Planning and Budgeting, and a team of budget administrators examine the budget process for the expressed purpose of rewarding those areas that are successfully conducting diversity activities.
Much of the discussion on this topic involved the definition of outreach and how the definition should be broadened to include all segments of the University community. A recommendation to hold a University Forum on Outreach sponsored by the President’s office was made. Numerous issues and recommendations were raised, but there was no attempt to correlate specific issues with specific recommendations.

- Lack of institutional commitment to outreach
- The role of outreach within the context of the mission of the University is not clear.
- Internal and external perceptions of outreach efforts vary - (e.g. is the focus of BGSU on research, undergraduates, residential students?)
- Insufficient monies devoted to outreach
- The definition of outreach needs to be clarified

**Administrative Staff Council - Focus Group**
**Outreach Community**
**Key Issues Raised**

**Administrative Staff Council - Focus Group**
**Outreach Community**
**Recommendations**

- Broaden the University mission to include more than the residential undergraduate student. Recommend that the President in consultation with the entire campus community reevaluate the University's mission to include new-traditional students.

- Develop more diverse and inclusive consistent approaches to outreach. Recommend the establishment of a possible one-stop outreach educational center which would coordinate all outreach activities on campus (e.g. publications, fund-raising, etc.)

- Revise the current budget process to support outreach activities. Recommend that the President, the Vice President for Planning and Budgeting, and a team of budget administrators examine the budget process for the expressed purpose of rewarding those areas that are successfully conducting outreach activities.

- Define outreach in a broader context (e.g. participation of University members in local organizations is a form of outreach). Recommend that a University Forum on Outreach be sponsored by the President’s office.
January 29, 1996

MEMORANDUM

TO:    Dr. Sidney Ribeau
        President's Office

FROM:  Bryan Banner, Chair
        Administrative Council

RE:    ASC Meeting on February 7, 1996

The Administrative Staff Council is looking forward to meeting with you at the February 7th ASC council meeting at 1:30 p.m. in the Campus Room of the University Union. The following is a list of questions that was prepared by the ASC Executive Committee to aid in your preparation for this meeting.

1) What do you perceive to be the roles of the constituent groups within the University? How do you see these groups working together to enhance the programs at the University?

2) Concerning the Building Community Program, after the focus group sessions are completed, what are the next steps in the process?

3) What do you feel we are achieving with the Mercer process?

4) What suggestions would you have concerning how ASC can assist on such issues as increasing enrollments and supporting graduate education programs?

5) What are your views on merit compensation programs?

6) Do you foresee a time when students will have to purchase a computer as a condition of enrollment?

7) What are your opinions concerning a V.P. for Human Resources?

8) Would you support sabbatical leaves for admin. staff?

9) Are we planning to close the University between Christmas and New Years?
10) Could the University reevaluate the snow emergency policy?

11) What are the possibilities of developing a continuing EPIP program for Classified & Administrative staff?

12) Are you planning changes in the budget process? If so, would you share these with us?

Once again, I would like to thank you for meeting with ASC. Hope these questions are useful. Please contact Joan Morgan or myself if you have any questions. Our numbers are: Joan 2-9875, and myself 2-7634.
March 18, 1996

MEMORANDUM

TO: Dr. J. Christopher Dalton  
    Vice President, Planning & Budgeting

FROM: Bryan Benner,  
    Chair, ASC

RE: Salary Recommendations

The following concerns the ASC recommended percentage salary increase for FY96-97. Per discussions at our ASC March 7, 1996, Council meeting, it was clear that Administrative Staff at BGSU supports the concept of merit pay. The difficulty Administrative Staff have with merit pay arises from the lack of both a consistent performance evaluation and merit pay processes. The lack of these processes has led to the inconsistent and arbitrary distribution of merit.

The ASC recognizes that presently the Office of Human Resources is developing a new administrative performance evaluation system, and this process is proceeding with broad input from Administrative Staff members. If the end result is a consistent and fair performance system for all Administrative Staff, the foundation for developing consistent and appropriate distribution of merit pay on an objective basis may become possible.

Over the years, little money has been available for real merit increases. When money has been available, managers and employees alike agonize over a fair assessment of merit pay. Lacking objective criteria, subjective value judgments must be made. Many managers, accurately recognizing lose-lose propositions, do not distinguish between merit increases, assigning values that result in 100% across the board pay increases. While merit pay systems may be viewed by some as counterproductive to community building, fair and equitable merit systems can be developed that foster teamwork and improve work performance.

Considering the lack of a consistent evaluation process at this time, we would recommend that merit be deferred until such a system is in place. If it is determined that merit is still to be distributed in FY96-97, then as in past years, we would recommend that merit only be considered for that portion of the proposed increase beyond the expected rate of inflation.
Concerning the ASC percentage increase for FY96-97, our recommendation is based on the long standing goal of attaining a 4th salary position amongst Ohio Public Universities. During FY95-96 according to the CUPA DATA which has been used to evaluate administrative staff salaries over the last 6 years, BGSU would move from 7th to 10th place out of 11 institutions. In order for us to move into 4th place at this time, an increase of 6.05% is required. Therefore, the recommendation of ASC is a 6.05% increase.

Attached for your review is the analysis prepared by the ASC salary committee.

Your review of this material is appreciated. Please contact me if further information is needed.

ljh

xc: Dr. Sidney Ribeau
Mr. Robert Martin
Chair, CSC
Chair, Faculty Senate
MEMORANDUM

March 6, 1996

To: Administrative Staff Council
From: ASC Salary Committee
Re: 1996 Salary Recommendation

Since work has been undertaken by a joint subcommittee of the Salary Committee and the Personal Welfare Committee to generate a broad recommendation for the award of salary increases, the Salary Committee has concentrated on reviewing the results of the College and University Personnel Association (CUPA) survey of salaries for the institutions in the State of Ohio. This has been a consistent exercise for a minimum of six years, which gives us a reasonable base for comparison and trends. It also makes our recommendation specific to the numbers involved, and expressed solely in a numerical fashion.

As noted in the Executive Summary, the University has lost ground in five of the six versions of salary comparisons, with the most severe loss in Modified Version 3.1. MV 3.1 represents all BGSU CUPA positions found at a minimum of five institutions, less the executive positions and those positions filled by faculty and classified staff. This version has been the version on which we have based our recommendations for the past six years, and has always been recognized as the most appropriate for this purpose by the Administration. MV 3.1 reflected a 2.48% BGSU loss from the state wide average salary from 94-95 to 95-96.

While a change in the Presidency may change the pledged support of the President's Office to bring faculty salaries to the 60th percentile of Category - I Universities, we feel that this remains a reasonable goal, and remains the basis for our goal of attaining the status of 4th out of 11 Ohio comparable institutions considered in our analysis. While we have dropped from 7th place last year to 10th place this year, we are now 2.93% closer to the fourth place institution than we were one year ago. Even with this in mind, with a projected 2.7% rate of inflation for the next year and the assumption that the fourth place University would keep pace with that rate at a minimum, we would need a 6.05% increase to barely move into 4th place. The request for this 6.05% increase is in fact the recommendation of the committee.
Appendix A
1995-96
Summary of CUPA - BGSU Average Salary
   Compared to State Average

<table>
<thead>
<tr>
<th>Version</th>
<th>BGSU # of Cases</th>
<th>BGSU Average</th>
<th>CUPA Average</th>
<th>Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>MV 1.1</td>
<td>79</td>
<td>$55,946</td>
<td>$58,714</td>
<td>($2,768)</td>
<td>-4.71%</td>
</tr>
<tr>
<td>MV 2.1</td>
<td>63</td>
<td>$55,054</td>
<td>$58,771</td>
<td>($3,717)</td>
<td>-6.32%</td>
</tr>
<tr>
<td>MV 3.1</td>
<td>55</td>
<td>$56,199</td>
<td>$60,525</td>
<td>($4,326)</td>
<td>-7.15%</td>
</tr>
<tr>
<td>MV 4.1</td>
<td>20</td>
<td>$59,587</td>
<td>$61,594</td>
<td>($2,007)</td>
<td>-3.26%</td>
</tr>
<tr>
<td>MV 5.1</td>
<td>76</td>
<td>$58,057</td>
<td>$59,020</td>
<td>($2,963)</td>
<td>-5.02%</td>
</tr>
<tr>
<td>MV 6.1</td>
<td>66</td>
<td>$57,076</td>
<td>$60,164</td>
<td>($3,088)</td>
<td>-5.13%</td>
</tr>
</tbody>
</table>

Recommendation based upon MV 3.1
Appendix B
1995-96
Summary of Comparison of BGSU Salaries
to Other State Schools Using Common Positions
(MV 3.1)

<table>
<thead>
<tr>
<th>School</th>
<th># of Positions</th>
<th>Average Salary</th>
<th>BGSU Average Salary</th>
<th>Difference</th>
<th>% Difference from BGSU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ohio State</td>
<td>44</td>
<td>$77,990</td>
<td>$56,361</td>
<td>$21,629</td>
<td>38.38%</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>36</td>
<td>$73,531</td>
<td>$60,893</td>
<td>$12,638</td>
<td>20.75%</td>
</tr>
<tr>
<td>Ohio</td>
<td>39</td>
<td>$64,302</td>
<td>$58,313</td>
<td>$5,989</td>
<td>10.27%</td>
</tr>
<tr>
<td>Toledo</td>
<td>36</td>
<td>$59,946</td>
<td>$58,006</td>
<td>$1,940</td>
<td>3.34%</td>
</tr>
<tr>
<td>Kent</td>
<td>46</td>
<td>$56,989</td>
<td>$55,319</td>
<td>$1,670</td>
<td>3.02%</td>
</tr>
<tr>
<td>Miami</td>
<td>35</td>
<td>$59,869</td>
<td>$58,150</td>
<td>$1,718</td>
<td>2.96%</td>
</tr>
<tr>
<td>Wright</td>
<td>37</td>
<td>$57,425</td>
<td>$55,875</td>
<td>$1,550</td>
<td>2.77%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>39</td>
<td>$60,332</td>
<td>$59,110</td>
<td>$1,228</td>
<td>2.08%</td>
</tr>
<tr>
<td>Akron</td>
<td>38</td>
<td>$58,586</td>
<td>$58,489</td>
<td>$97</td>
<td>0.17%</td>
</tr>
<tr>
<td><strong>BGSU</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Youngstown</td>
<td>36</td>
<td>$53,385</td>
<td>$53,893</td>
<td>($508)</td>
<td>-0.94%</td>
</tr>
</tbody>
</table>

% Difference:
- 40.00%
- 35.00%
- 30.00%
- 25.00%
- 20.00%
- 15.00%
- 10.00%
- 5.00%
- 0.00%
- -5.00%

Institution:
- CS
- LC
- KS
- WS
- AU
- BG
- YS
Appendix E
Percentage of BGSU Salaries
Greater than 10% Below the State Average
for that Position
Six Year Comparison
May 6, 1996

MEMORANDUM

TO: Dr. Sidney Ribeau
    President's Office

FROM: Bryan Benner, Chair
       Administrative Staff Council

RE: Position Analysis and Compensation Plan

At the May 2, 1996, Administrative Staff Council meeting the issue of salary caps was raised as it pertains to the proposed position analysis and compensation plan. Specifically, early in the process it was agreed that no salary caps would be imposed on existing staff salary ranges as a result of the position analysis study. This was communicated to all administrative staff and was a key factor in building support for the plan.

Recent "rumors" have included the possibility that salary caps are currently under discussion by the administration. The purpose of this memo is to ascertain if this is true. These "rumors" have surfaced in the last week and are causing some anxiety amongst administrative staff.

Your review of this matter is appreciated. Please contact Dr. Joan Morgan or myself if you require additional information.

ljh
MEMORANDUM

TO: Charles Middleton, Ph.D.
    Provost and Vice President for Academic Affairs

FROM: Duane Whitmire, Ph. D.
    Chair of Administrative Staff Council

RE: Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University

As a follow-up to a phone conversation with Norma Stickler, attached please find the Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University which was approved by Administrative Staff Council on June 5, 1997.

If you need any additional information, please feel free to contact me.

pc: J. Boyce, ASC Chair-Elect
    J. Donald, ASC Secretary
    J. Luthman, ASC-PWC Chair
    D. Magrum, President's Office
    J. Morgan, ASC Former Chair
    N. Stickler, Provost's Office
Principles and Recommendations for a Performance-Based Merit System for Administrative Staff at Bowling Green State University

The Administrative Staff Council believes that a number of important principles must form the foundation for an effective performance appraisal process and for the equitable distribution of salary increment awards. The Council endorses the concept of a performance-based merit system for awarding employee salary increases provided such a system is fair, equitable, and firmly grounded on these principles. By "merit", the Council means a salary increment that is allotted for performance of duties that meets or exceeds unit expectations. The following principles underlie an effective performance-based merit system:

1. An effective merit system should promote employee recruitment and retention, adequately reward conscientious performance of normal duties and responsibilities, and provide incentives that encourage distinguished, innovative and creative achievements to meet unusual challenges and opportunities when they arise.

2. A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges or departments). The institution should monitor and ensure that employee salaries continue to be commensurate with individual employee's skills, abilities, and experience.

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member.

4. A performance-based merit system should engender the type, quantity, and quality of performance that contributes to the achievement of institutional and unit missions and goals. The reward system also needs to account for a variety of ways that an employee may support these missions and goals.

5. A performance-based merit system needs to establish a clear connection between employee performance and reward. Meritorious performance should be rewarded in tangible ways through significant progression within a salary range or promotion and movement to a new salary range when deemed appropriate. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well for those types of achievements that surpass the unit's standard expectations.

6. The performance appraisal process should provide employees with constructive comments that enable them to develop professionally and to make improvements in performance.

7. A performance-based merit system must avoid trivializing the system by spreading merit too thinly and thus minimizing the impact of any incentive awards given.

8. Even the best annual review systems may produce salary inequities or may fail to appropriately reward contributions or performances spread over longer periods of time. Thus, an annual merit review system needs to be supplemented by periodic five-year comprehensive reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster cooperation among staff, should reward individuals for collaborative efforts, and should generate wide support and general satisfaction on the University campus.
10. Both the performance-based merit system and the performance appraisal process will be reviewed annually by ASC, which will make recommendations for modification as appropriate.

Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to administrative staff members.

Recommendations

1. Each year, the University should identify, review, and address employee salaries which may be inequitable, such as the salaries of those individuals who are below the midpoint of their salary grade. Funds should be made available on a regular, on-going basis to correct salary inequities, make market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary, and to support raises for promotions. These funds should not be considered part of the annual merit pool.

2. To establish a clear connection between employee performance and reward, meritorious performance should be rewarded in tangible ways through significant progression within a salary range, or promotion and movement to a new salary range when deemed appropriate.
   a. Upon the completion of five years of meritorious assessments, an employee's salary shall be reviewed and increased to further progression through the designated salary range. The amount awarded will be contingent upon available institutional resources.
   b. After five consecutive years of meritorious assessments, the employee shall be granted an annually renewable, five year contract with provisions for annual salary increases. Annual renewal will be contingent upon continued meritorious performance.

3. A performance-based merit system must be administered openly and reliably. Thus, changes in evaluation and merit pay criteria must be completed before the new contract year, i.e. before June 30 of the prior contract year. To ensure that employees can contest unfair merit assessments, timely disclosures of merit performance evaluations are necessary. Continual dialogue between the supervisor and the employee about progress towards goals is essential.

TIME DEADLINES

a. Performance appraisal forms must be completed by May 31 of the prior contract year.

b. Meritorious assessment must be known at the completion of the evaluation process. (May 31)

c. Merit criteria must be known prior to start of the next contract year.

d. A supervisor will meet with employees between November 15 and January 15 for a dialogue on progress toward their annual goals. The supervisor will document at that time an employee's performance which is falling below a satisfactory level. The supervisor will be expected to continue to engage in on-going dialogue with the employee to improve employee performance.

4. A supervisor's merit evaluation will include an assessment of the completion of performance evaluations and merit pay recommendations for their staff on time. Failure to do so will be deemed performance below expectations.
5. Human Resources will review all annual performance evaluations and merit pay recommendations to ensure consistency and integrity. Issues concerning the process will be communicated to ASC-PWC on an annual basis.

6. The annual merit allocation should be based upon the meritorious accomplishments over the most recent three-year period on a rolling basis, i.e., each year new information is added to the file for the most recent year and information for the oldest year is eliminated from the file. This will help to reduce inequities that can result from differences in the merit funds available each year and from fluctuations in performance that may occur from year to year.

7. All employees will be evaluated in their annual performance reviews to determine their eligibility for merit. Merit eligibility is determined by the job performance of an employee, as assessed by the Administrative Staff Performance Appraisal Form. Performing one's job at a satisfactory level and in a competent manner is the basis for merit pay. Given that an employee will qualify for a merit increase by meeting, as well as exceeding, unit standards, it is expected that very few employees will fail to qualify for merit.

8. Any employee who does not qualify for merit in their annual performance review should not receive a salary increase. A professional development fund equal to the uniform percentage raise that would have been allocated to the individual, should be made available to the department or academic unit for employee development, with priority given to assisting employees who have failed to qualify for a merit increment.

9. If the total merit pool for salary increments in a given year is three percent (3%) or less, all employees who qualify for merit in their annual performance reviews will receive the same percentage increase in salary.

10. If the total merit pool for salary increments in a given year is more than three percent (3%) but less than five percent (5%), it will be allocated according to the following guidelines:

   a. Three percent (3%) of the total salaries of employees shall be allocated as a three percent (3%) increase in salary to all employees who qualify for merit based on their annual performance reviews.

   b. The remaining difference between the total merit pool and the three percent (3%) of the total salaries of the administrative staff shall be allocated to departments and units for recognition of those employees whose level of performance exceeds department or unit expectations as defined by the merit policy of the department or unit.

11. If the total merit pool is five percent (5%) or more, it will be allocated according to the following guidelines:

   a. Sixty percent (60%) shall be allocated to departments/units to be used as an equal percentage increase in salary to all employees who meet or exceed department/unit expectations and thereby qualify for merit in their annual performance reviews.

   b. Forty percent (40%) shall be allocated to departments/units for recognition and reward of those employees whose level of performance exceeds department/unit expectations as defined by the merit policy of the department/unit.

Approved by Administrative Staff Council - June 5, 1997
Draft of Administrative Staff Compensation Plan Follow-Up Items

At the Board of Trustees meeting on September 13, 1996, ten policy recommendations regarding the Administrative Staff Compensation (Mercer) Plan were passed. At the same time, a commitment was made to continue the dialog as the implementation of the Plan progressed. In the interest of keeping that dialog open and ongoing, the following items need to be resolved in the year ahead (these are not listed in priority order).

- Resolving any positions that were not part of the original process
- Reaching closure on any appeals not resolved
- Developing a mechanism for placement and progression through a grade/range (including movement to the midpoint in a timely manner)
- Reviewing gender and/or other inequities and making appropriate modifications to individuals' salaries
- Examining employees, and appropriate adjustment in salaries, who have been at the University but are still near the bottom of their grades/ranges
- Developing a method for humanely dealing with individuals over the maximum
- Grievance process review is needed
- Are the ASC & CSC handbooks legally binding? (Include in Charter & make available on the web)
- Joan Morgan has asked for months for a copy of a listing of all administrative staff and their rankings as well as those who are exempt from classification
- Another University-wide meeting(s) of administrative staff where answers are given (Mercer Summit?)

- How she perceives her role as "advocate"
- In CS, AS, and faculty? Plans she has to make the office structure more employee-oriented?
- University hiring process in the last three years?
June 16, 1997

MEMORANDUM

TO: Board of Trustees

FROM: Sidney A. Ribeau
President

RE: Proposed Principles and Recommendations for a Performance-Based Merit System for Administrative Staff

Attached are the Proposed Principles and Recommendations for a Performance-Based Merit System for Administrative Staff as passed by the Administrative Staff Council and amended by the Central Administration. Boldfaced sections indicate additions which have been made by the Administration. Deletions are indicated by a line running through the original text. I forward the document to you for your consideration.

dmm

attachment
PRINCIPLES AND RECOMMENDATIONS FOR A PERFORMANCE-BASED MERIT SYSTEM FOR ADMINISTRATIVE STAFF AT BOWLING GREEN STATE UNIVERSITY

The Administrative Staff Council believes that a number of important principles must form the foundation for an effective performance appraisal process and for the equitable distribution of salary increment awards. The Council endorses the concept of a performance-based merit system for awarding employee salary increases provided such a system is fair, equitable, and firmly grounded on these principles. By "merit", the Council means a salary increment that is allotted for performance of duties that meets or exceeds unit expectations. The following principles underlie an effective performance-based merit system:

1. An effective merit system should promote employee recruitment and retention, adequately reward conscientious performance of normal duties and responsibilities, and provide incentives that encourage distinguished, innovative and creative achievements to meet unusual challenges and opportunities when they arise.

2. A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges or departments). The institution should monitor and ensure that employee salaries continue to be commensurate with individual employee's skills, abilities, and experience.

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member THE PRESIDENT OR AREA VICE PRESIDENT.

4. A performance-based merit system should engender the type, quantity, and quality of performance that contributes to the achievement of institutional and unit missions and goals. The reward system also needs to account for a variety of ways that an employee may support these missions and goals.

5. A performance-based merit system needs to establish a clear connection between employee performance and reward. Meritorious performance should be rewarded in tangible ways, through significant progression within a salary range or promotion and movement to a new salary range when deemed appropriate. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well for those types of achievements that surpass the unit's standard expectations.

6. The performance appraisal process should provide employees with constructive comments that enable them to develop professionally and to make improvements in performance.

7. A performance-based merit system must avoid trivializing the system by spreading merit too thinly and thus minimizing the impact of any incentive awards given.

8. Even the best annual review systems may produce salary inequities or may fail to appropriately reward contributions or performances spread over longer periods of time. Thus, an annual merit review system needs to be supplemented by periodic five-year comprehensive reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster cooperation among staff, should reward individuals for collaborative efforts, and should generate wide support and general satisfaction on the University campus.
10. Both the performance-based merit system and the performance appraisal process will be reviewed annually by ASC, which will make recommendations for modification as appropriate.

Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to administrative staff members.

Recommendations

1. Each year, the University should identify, review, and address employee salaries which may be inequitable, such as the salaries of those individuals who are below the midpoint of their salary-grade. Funds should be made available on a regular, ongoing basis to correct salary inequities, make market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary, and to support raises for promotions. These funds should not be considered part of the annual merit pool.

2. To establish a clear connection between employee performance and reward, meritorious performance should be rewarded in tangible ways, through significant progression within a salary range, or promotion and movement to a new salary range when deemed appropriate. EACH EMPLOYEE WILL HAVE A PERFORMANCE EVALUATION PLAN WHICH SPECIFIES PERFORMANCE INDICATORS TO BE REWARDED.

a. Upon the completion of five years of meritorious assessments, an employee's salary shall be reviewed and increased to further progression through the designated salary range. The amount awarded will be contingent upon available institutional resources.

b. After five consecutive years of meritorious assessments, the employee shall be granted an annually-renewable, five-year contract with provisions for annual salary increases. Annual renewal will be contingent upon continued meritorious performance.

3. A performance-based merit system must be administered openly and reliably. Thus, changes in evaluation and merit pay criteria must be completed before the new contract year, i.e. before June 30 of the prior contract year. To ensure that employees can contest unfair merit assessments, timely disclosures of merit performance evaluations are necessary. Continual dialogue between the supervisor and the employee about progress towards goals is essential.

TIME DEADLINES

a. Performance appraisal forms must be completed by May 31 of the prior contract year.

b. Meritorious assessment EVALUATIONS must be known at the completion of the evaluation process. (May 31)

c. Merit criteria must be known prior to start of the next contract year.

d. A supervisor will meet with employees between November 15 and January 15 for a dialogue on progress toward their annual goals. The supervisor will document at that time an employee's performance which is falling below a satisfactory level. The supervisor will be expected to continue to engage in ongoing dialogue with the employee to improve employee performance.
4. A supervisor's merit evaluation will include an assessment of the completion of performance evaluations and merit pay recommendations for their staff on time. Failure to do so will be deemed performance below expectations.

5. THE DEPARTMENT OF Human Resources will review all annual performance evaluations and merit pay recommendations to ensure consistency and integrity. Issues concerning the process will be communicated to ASC-PWC on an annual basis.

6. The annual merit allocation should be based upon the meritorious accomplishments over the most recent three-year period on a rolling basis, i.e., each year new information is added to the file for the most recent year and information for the oldest year is eliminated from the file. This will help to reduce inequities that can result from differences in the merit funds available each year and from fluctuations in performance that may occur from year to year.

7. All employees will be evaluated in their annual performance reviews to determine their eligibility for merit. Merit eligibility is determined by the job performance of an employee, as assessed by the Administrative Staff Performance Appraisal Form. Performing one's job at a satisfactory level and in a competent manner is the basis for merit pay. Given that an employee will qualify for a merit increase by meeting, as well as exceeding, unit standards, it is expected that very few employees will fail to qualify for merit.

8. Any employee who does not qualify for merit in their annual performance review should not receive a salary increase. A professional development fund equal to the uniform percentage raise that would have been allocated to the individual, should be made available to the department or academic unit for employee development, with priority given to assisting employees who have failed to qualify for a merit increment.

9. If the total merit pool for salary increments in a given year is three percent (3%) or less, all employees who qualify for merit in their annual performance reviews will receive the same percentage increase in salary.

10. If the total merit pool for salary increments in a given year is more than three percent (3%) but less than five percent (5%), it will be allocated according to the following guidelines:

   a. Three percent (3%) of the total salaries of employees shall be allocated as a three percent (3%) increase in salary to all employees who qualify for merit based on their annual performance reviews.

   b. The remaining difference between the total merit pool and the three percent (3%) of the total salaries of the administrative staff shall be allocated to departments and units for recognition of those employees whose level of performance exceeds department or unit expectations as defined by the merit policy of the department or unit.

11. If the total merit pool is five percent (5%) or more, it will be allocated according to the following guidelines:

   a. Sixty percent (60%) shall be allocated to departments/units to be used as an equal percentage increase in salary to all employees who meet or exceed department/unit expectations and thereby qualify for merit in their annual performance reviews.

   b. Forty percent (40%) shall be allocated to departments/units for recognition and reward of those employees whose level of performance exceeds department/unit expectations as defined by the merit policy of the department/unit.

Approved by Administrative Staff Council - June 5, 1997
Amended by Central Administration - June 16, 1997
PRINCIPLES AND RECOMMENDATIONS FOR A PERFORMANCE-BASED MERIT SYSTEM FOR ADMINISTRATIVE STAFF AT BOWLING GREEN STATE UNIVERSITY

The Administrative Staff Council believes that a number of important principles must form the foundation for an effective performance appraisal process and for the equitable distribution of salary increment awards. The Council endorses the concept of a performance-based merit system for awarding employee salary increases provided such a system is fair, equitable, and firmly grounded on these principles. By "merit", the Council means a salary increment that is allotted for performance of duties that meet or exceed unit expectations. The following principles underlie an effective performance-based merit system:

1. An effective merit system should promote employee recruitment and retention, adequately reward conscientious performance of normal duties and responsibilities, and provide incentives that encourage distinguished, innovative and creative achievements to meet unusual challenges and opportunities when they arise.

2. A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges or departments). The institution should monitor and ensure that employee salaries continue to be commensurate with individual employee's skills, abilities, and experience.

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member, SUBJECT TO THE REVIEW AND APPROVAL OF THE PRESIDENT OR AREA VICE PRESIDENT.

4. A performance-based merit system should engender the type, quantity, and quality of performance that contributes to the achievement of institutional and unit missions and goals. The reward system also needs to account for a variety of ways that an employee may support these missions and goals.

5. A performance-based merit system needs to establish a clear connection between employee performance and reward. Meritorious performance should be rewarded in tangible ways, through significant progression within a salary range or promotion and movement to a new salary range when deemed appropriate. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well for those types of achievements that surpass the unit's standard expectations.

6. The performance appraisal process should provide employees with constructive comments that enable them to develop professionally and to make improvements in performance.

7. A performance-based merit system must avoid trivializing the system by spreading merit too thinly and thus minimizing the impact of any incentive awards given.

8. Even the best annual review systems may produce salary inequities or may fail to appropriately reward contributions or performances spread over longer periods of time. Thus, an annual merit review system needs to be supplemented by periodic five-year comprehensive reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster cooperation among staff, should reward individuals for collaborative efforts, and should generate wide support and general satisfaction on the University campus.
10. Both the performance-based merit system and the performance appraisal process will be reviewed annually by ASC, which will make recommendations for modification as appropriate.

Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to administrative staff members.

Recommendations

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Approved by Administrative Staff Council - June 5, 1997
Amended by Central Administration - June 16, 1997
Administrative Staff Council  
Standing Committees  
1997-98

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<tr>
<td>Beverly Stearns</td>
<td>Pat Green, Co-Chair (R) (AA)</td>
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<td>Linda Hamilton (R) (F)</td>
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<tr>
<td>Pat Kania (AL) (AA)</td>
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R = Representative  
AL = At-large  
AA = Academic Affairs  
F = Finance  
Oper = Operations  
Pres = President’s  
SA = Student Affairs  
UA = University Advancement  

Revised 9/8/97
### FREQUENCY OF NEW HIRES
1997-98 and 1998-99

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**Total**: 87 116

### SUGGESTED STAFF NEW HIRE ORIENTATION SESSION FREQUENCY
(Five Times a Year)

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**Total**: 87 116
HR Priorities
7/6/99

1) Placement (We will be stating our need to move employees with salary compression and inversion concerns to appropriate places in their ranges...using the argument in the compensation plan - current positions in this predicament are there because of "market" hires since the "Mercer" compensation plan was put in place...which of course supports what we have been saying all along, many people were not placed correctly in their ranges at the Mercer implementation. Again we will state we feel this is a necessary step to prevent the erosion of fairness within a 100% merit environment driving range progression.)

2) Merit (The BOT have a merit document. We are operationalizing part of it this year. The part that is not being operationalized is the "super" merit portion, due to the pay increases being at or below 3%. Three things about merit we must address. One is the generating of unit level discussions setting "super" merit criteria. Two, feeling secure that HR will gate-keep the process and outcome to insure participation and relative conformity. And third, if there is a move by VPs to change the way "regular" merit is distributed (rumor), we want to make sure HR knows we want a say in this discussion and framing for the BOT.)

3) Performance Evaluation (Follow-thru with survey and outcome...which we believe will be - The Process is good, the Tool is not - where do we go from there??)

4) Handbook (Where will the update live?? We feel the web - HR's page, linked to from our page. Who will update it?? We feel HR should but we are certainly prepared to help with this.)

5) Professional Development (Budget from HR...hoping to continue the good work done last year by our Professional Development committee. We would also like to create a database of Professional Development activities done by all Administrative staff to add to HR's accounting for their end of the year report. We see this as another duty of the Professional Development committee.)
**Suggested Goals for ASC 1999-2000**

1. **Performance Evaluation (Personnel Welfare)**
   Follow-up process started by IPRA (Institute for Psychological Research and Application)

2. **Merit Criteria (Personnel Welfare)**
   Define criteria for merit, "super merit", determine accountability (HR?).

3. **ASC Representation on University committees (External Affairs)**

4. **ASC Web/Listroc Presence (Internal Affairs)**
   Distribution of updates, minutes of meetings, handbook, special messages/opportunities, etc.

5. **Program Review (Executive)**
   Ask: about reactionary input for the Final Report which now areas only have input to regarding factual data correction.

   Update, distribute and develop a process for continuous updating.

7. **Professional Development Workshops (Professional Development)**
   Continue effort put forth this past year with regards to workplace needs being addressed in Professional Development workshops.

8. **Scholarship Endowment Goal (Scholarship)**
   Set a goal and look to get matching for Alumni Association like two years ago...or another group??

9. **Compensation Plan (Personnel Welfare/Salary)**
   Placement, Progression, Market analysis of ranges/positions. Reaction to President’s compensation plan.

10. **Administrative Staff Teaching Compensation**
BY-LAWS OF THE ADMINISTRATIVE STAFF COUNCIL

ARTICLE 1 MEETINGS

Section 1: Regular Council Meetings

Regular meetings of the Administrative Staff Council shall be held once each month during the academic year and as needed during the summer. Council members are expected to attend each meeting and will be notified of the date, time, and location at least two weeks prior to the date.

Section 2: Special Council Meetings

Special meetings of the Administrative Staff Council may be called by the Executive Committee or by one-third of the members of the full Council.

Section 3: Administrative Staff Meetings

The entire Bowling Green State University administrative staff will meet at a called session at least once each year. Special meetings of this group may be called upon the request of 10 percent of the full membership of the administrative staff or by a majority of the members of the Administrative Staff Council. The secretary shall provide due notification of all meetings. Issues may be discussed and suggestions made. Any votes to be taken will be by ballot distributed to the entire administrative staff.

Section 4: Executive Committee Meetings

The Administrative Staff Council Executive Committee shall meet twice each month during the academic year and once each month at other times. Special meetings of the Executive Committee may be called by the chair or by a majority of the members of the Committee.

Section 5: Alternates at ASC Meetings

Alternates may be designated by any Administrative Staff Council member who finds that attendance at an Administrative Staff Council meeting is not possible. Alternates must be chosen from the vice presidential or presidential area represented by the council member and must be identified to the Administrative Staff Council chair prior to the beginning of the meeting. An alternate so chosen and so identified may participate in discussion, initiate motions and vote on all issues, save those involving amendment to the charter or by-laws. Alternates may replace any single council member no more than three times in one year.

Section 6: Attendance Policy

Administrative Staff Council members will select a designated alternate who may substitute for said ASC member a maximum of three times per fiscal year. An ASC member who is absent in excess of these three regular meetings shall be designated by the Executive Committee as absentee.

After the absentee Administrative Staff Council member has been notified by the secretary of his/her designation as absentee, his/her name shall be placed before members of the Executive Committee at any regular meeting. At that time, a vote of two-thirds of those present shall be sufficient to remove the absentee Administrative Staff Council member from office.
ARTICLE 2  COMMITTEES

Section 1: Executive Committee

The ASC Executive Committee shall act for the Administrative Staff Council between meetings and shall act as or designate a liaison between the Administrative Staff Council and other governance groups, individuals, and agencies. The Executive Committee shall set the agendas for ASC meetings and shall set priorities and goals yearly in September.

Section 2: ASC Standing Committees

The members of ASC standing committees will be ASC members and will be appointed by the chair. ASC members may be nominated or may volunteer to serve on ASC standing committees. Membership on these committees will be for one year. Members are eligible for reappointment. Standing committees may appoint subcommittees whose members need not be ASC representatives. The Chair of ASC shall appoint a Chair for each Standing Committee. Each chair shall submit in May a yearly report of the committee's activities to the Executive Committee. The duties and responsibilities of the following ASC standing committees are:

A. **Elections Committee** - This committee shall be composed of the ASC secretary, who shall be its chair, the Chair-Elect, and other council members as needed. The committee shall assist the secretary in initiating, conducting, tabulating and announcing the results of nominations and elections for both ASC and appropriate University standing committees and in maintaining election eligibility and voting records.

B. **Professional Development Committee** - This committee is charged with aiding and encouraging the professional growth and development of administrative staff. It shall study and recommend action with regard to professional leaves, continuing education and recognition of professional achievement.

C. **Personnel/Welfare** - This committee shall annually review the Administrative Staff Handbook. The committee shall include at least one member from each vice presidential area and the president's area. The committee shall also review, study and recommend Council action on matters involving general salary policies, benefits, performance, evaluation and policies and procedures which affect the functioning of administrative staff in their positions. The chair of PWC shall be on the Executive Committee.

D. **Finance** - The Chair-Elect shall prepare annually the ASC budget and submit it to the ASC for approval prior to its submission to the University budget committee.

E. **Scholarship** - The responsibility of the committee shall be to administer all aspects of the administrative staff scholarship program.

F. **Amendments** - This committee shall both initiate and receive proposed amendments to the charter or by-laws and shall report to the ASC on all proposed amendments.

G. **Ferrari Award** - This committee shall handle all responsibilities associated with the advertisement, selection and presentation of the annual Ferrari Award. One member from each vice presidential area and the president's area should be on the committee.

H. **Salary** - This committee shall compile comparative data and make a salary proposal each year on behalf of the administrative staff.
ADMINISTRATIVE STAFF COUNCIL

1997-98

**PROVOST'S AREA**
Jerry Ameling (1998)
Carmen Castro-Rivera (1998) **
Joyce Kepke (1998)
Inge Klopping (1998)
Paul Lopez (1998)
Rebecca McOmber (1998)
Joan Morgan (1998) - Past Chair **
Sally Blair (1998)
Jan Peterson (1998)
Bev Stearns (1998)
Betty Ward (1998)
Duane Whitmire (1998) - Chair **
Paul Yon (1998)
Craig Bedra (1999)
Joyce Blinn (1999)
Deb Burris (1999)
Dianne Cherry (1999)
Judy Donald (1999) - Secretary **
Mike Failor (1999)
Sharon Hanna (1999)
Gene Palmer (1999)
Tim Smith (1999)
Pat Green (2000) **
Laura Waggoner (2000)
Matt Webb (2000)
Deb Wells (2000) **
Calvin Williams (2000)

**PRESIDENT'S AREA**
Scot Bressler (1998)
Robin Veitch (1998)
Penny Dean (1999)
James Elsasser (1999) **
Randy Julian (1999)
Kurt Thomas (1999)
Shelley Appelbaum (2000)

**STUDENT AFFAIRS**
Elayne Jacoby (1998)
Sue Perkins (1998)
Cindy Puffer (1998)
Jodi Webb (1998) **
Bonita Sanders Bembry (1999)
Dawn Mays (1999)
Reva Walker (1999)

**UNIVERSITY ADVANCEMENT**
Deborah Boyce (1998) - Chair Elect **
Ken Frisch (1999)

**FINANCIAL AFFAIRS**
Linda Hamilton (2000) **

** Executive Committee
ADMINISTRATIVE STAFF COUNCIL
1997-98

PROVOST'S AREA
Jerry Ameling (1998)
Carmen Castro-Rivera (1998) **
Joyce Keple (1998)
Inge Klopping (1998)
Paul Lopez (1998)
Rebecca McOmber (1998)
Joan Morgan (1998) - Past Chair **
Donna Nelson (1998)
Jan Peterson (1998)
Bev Stearns (1998)
Betty Ward (1998)
Duane Whitmire (1998) - Chair **
Paul Yon (1998)
Craig Bedra (1999)
Joyce Blinn (1999)
Deb Burris (1999)
Dianne Cherry (1999)
Judy Donald (1999) - Secretary **
Mike Failor (1999)
Sharon Hanna (1999)
Gene Palmer (1999)
Tim Smith (1999)
Pat Green (2000) **
Laura Waggoner (2000)
Matt Webb (2000)
Deb Wells (2000) **
Calvin Williams (2000)

FIRELANDS
Deborah Knigga (1998)

OPERATIONS
Bob Waddle (1998)
Jan Ruffner (1999) **
Sandy LaGro (2000)
Jane Schimpf (2000)

PRESIDENT'S AREA
Scot Bressler (1998)
Tom Glick (1998)
Penny Dean (1999)
James Elsasser (1999) **
Randy Julian (1999)
Kurt Thomas (1999)
Shelley Appelbaum (2000)

STUDENT AFFAIRS
Elayne Jacoby (1998)
Sue Perkins (1998)
Cindy Puffer (1998)
Jodi Webb (1998) **
Bonita Sanders Bembry (1999)
Dawn Mays (1999)
Reva Walker (1999)
Jeanne Wright (1999)

UNIVERSITY ADVANCEMENT
Deborah Boyce (1998) - Chair Elect **
Ken Frisch (1999)

FINANCIAL AFFAIRS
Linda Hamilton (2000) **

*Executive Committee

Revised 5/30/97
ADMINISTRATIVE STAFF COUNCIL

1997-98

ACADEMIC SUPPORT
Carmen Castro-Rivera (1998)**
Joyce Kepke (1998)
Inge Klopping (1998)
Jan Peterson (1998)
Bev Steams (1998)
Betty Ward (1998)
Judy Donald (1999) - Secretary **
Matt Webb (2000)
Paul Yon (1998)
Deb Burris (1999)
Pat Green (2000)

STUDENT SUPPORT
Elayne Jacoby (1998)
Sue Perkins (1998)
Cindy Puffer (1998)
Jodi Webb (1998)**
Bonita Sanders Bembry (1999)
Dawn Mays (1999)
Reva Walker (1999)
Rebecca McOmber (1998)
Joan Morgan (1998) - Past Chair
Gene Palmer (1999)
Laura Waggoner (2000)
Joyce Blinn (1999)

FIRELANDS
Deborah Knigga (1998)

INSTITUTIONAL SUPPORT
Bob Waddle (1998)
Jan Ruffner (1999)**
Sandy LaGro (2000)
Jane Schmipf (2000)
Deborah Boyce (1998) - Chair Elect **

TECHNOLOGY
Jerry Ameling (1998)
Paul Lopez (1998)
Sally Blair (1998)
Duane Whitmire (1998) - Chair **
Diane Cherry (1999)
Mike Failor (1999)
Sharon Hanna (1999)
Tim Smith (1999)
Deb Wells (2000)
Calvin Williams (2000)

ATHLETICS/SPORTS ACTIVITIES
Scot Bressler (1998)
Robin Veitch (1998)
Penny Dean (1999)
James Elsasser (1999)**
Kurt Thomas (1999)
Shelley Appelbaum (2000)

ACADEMIC DEPARTMENTS
Craig Bedra (1999)

** Executive Committee
ADMINISTRATIVE STAFF COUNCIL

1997-98

**PROVOST'S AREA**
Jerry Amding (1998)
Carmen Castro-Rivera (1998)**
Joyce Kepke (1998)
Inge Kopping (1998)
Paul Lopez (1998)
Rebecca McOmber (1998)
Joan Morgan (1998) - Past Chair **
Sally Blair (1998)
Jan Peterson (1998)
Bev Stearns (1998)
Betty Ward (1998)
Duane Whitmire (1998) - Chair **
Paul Yon (1998)
Craig Bedra (1999)
Joyce Blinn (1999)
Deb Burris (1999)
Diane Cherry (1999)
Judy Donald (1999) - Secretary **
Mike Failor (1999)
Sharon Hanna (1999)
Gene Palmer (1999)
Tim Smith (1999)
Pat Green (2000) **
Laura Waggoner (2000)
Matt Webb (2000)
Deb Wells (2000) **
Calvin Williams (2000)

**STUDENT AFFAIRS**

Elayne Jacoby (1998)
Sue Perkins (1998)
Cindy Puffer (1998)
Jodi Webb (1998) **
Bonita Sanders Bembry (1999)
Dawn Mays (1999)
Reva Walker (1999)
Jahi Gye'Nyame (1999)

**FIRELANDS**

Deborah Knigga (1998)

**FINANCIAL AFFAIRS**

Linda Hamilton (2000) **

**OPERATIONS**

Bob Waddle (1998)
Jan Ruffner (1999) **
Sandy LaGro (2000)
Jane Schmipf (2000)

Revised 8/29/97
Administrative Staff Council
Standing Committees
1997-98

Amendments
Beverly Stearns, Chair (R) (AA)
John Hartung (R) (AA)
Matt Webb (R) (AA)
Mary Beth Zachary (AL) (AA)

Awards & Special Recognitions
Jane Schimpf, Chair (R) (Oper)
Jerry Ameling (R) (AA)
Scot Bressler (R) (Pres)
Deb Burris (R) (AA)
Dianne Cherry (R) (AA)
Kristen Donaldson (AL) (AA)
Ken Frisch (R) (UA)
Lisa McHugh (AL) (AA)
Bob Waddle (R) (Oper)

External Affairs
Bonita Sanders-Bembry, Chair (R) (SA)
John Clark (AL) (AA)
Elayne Jacoby (R) (SA)
Donna Wittwer (AL) (AA)
Karen Woods (AL) (AA)
Susan Young (AL) (AA)

Internal Affairs
Jan Peterson, Co-Chair (R) (AA)
Betty Ward, Co-Chair (R) (AA)
Laura Emch (AL) (AA)
Linda Hamilton (R) (F)
Pat Kania (AL) (AA)

Personnel Welfare
Pat Green, Co-Chair (R) (AA)
Inge Klopping, Co-Chair (R) (AA)
Ann Betts (AL) (SA)
Jahi Gye'Nyame (R) (SA)
Sharon Hanna (R) (AA)
Joyce Kepke (R) (AA)
Sandy LaGro (R) (Oper)
Paul Lopez (R) (AA)

Professional Development
Dawn Mays, Chair (R) (SA)
Mike Failor (R) (AA)
Ron Knopf (AL) (AA)
Judy Nemitz (AL) (SA)
Dan Parratt (AL) (AA)
Norma Stickler (AL) (AA)
Reva Walker (AL) (AA)

Salary
Gene Palmer, Chair (R) (AA)
Shelley Appelbaum (R) (Pres)
Craig Bedra, (R) (AA)
Jan Ruffner (R) (Oper)
Michelle Simmons (AL) (SA)

Scholarship
Carmen Castro-Rivera, Chair (R) (AA)
Lynne Blum (AL) (AA)
Deb Freyman (AL) (AA)
Sue Perkins (R) (SA)
Cindy Puffer (R) (SA)
Sally Raymont (AL) (AA)
Laura Waggner (R) (AA)
Jodi Webb (R) (SA)
Deb Wells (R) (AA)
Sabrina White (AL) (AA)

R = Representative
AL = At-large
AA= Academic Affairs
F = Finance
Oper = Operations
Pres = President’s
SA = Student Affairs
UA = University Advancement

Revised 9/8/97
ASC Standing Committee Charges

Amendments Committee
Chair: Beverly Stearns

The charge of the Amendments Committee is to initiate and receive proposed amendments to the Charter or Bylaws and to report to the ASC on all proposed amendments.

Awards & Special Recognitions Committee
Chair: Jane Schimpf

The charge of the Awards and Special Recognitions Committee is to develop and recommend to ASC ways to recognize administrative staff for their outstanding achievements. The committee also coordinates the advertisement, selection, and presentation of the awards and special recognitions including the annual Ferrari Award.

External Affairs Committee
Chair: Bonita Sanders-Bembry

The charge of the External Affairs Committee is to develop ways to improve opening day activities for administrative staff and to develop good public relations with other groups on campus, off campus and with the media.

Internal Affairs Committee
Co-chairs: Jan Peterson and Betty Ward

The charge of the Internal Affairs Committee is to develop and update the Orientation to ASC document and to orient new ASC members. In addition, the committee examines the election process and makes the appropriate recommendations.
Personnel Welfare Committee  
Co-chairs: Pat Green and Inge Klopping

The charge of the Personnel Welfare Committee is to review the Administrative Staff Handbook and to study/recommend Council action on matters involving general salary policies, benefits, performance, evaluations, and policies/procedures which affect the functioning of administrative staff in their positions.

Professional Development Committee  
Chair: Dawn Mays

The charge of the Professional Development Committee is to aid and encourage the professional growth and development of administrative staff. It studies and recommends action with regard to professional leaves, continuing education and recognition of professional achievement.

Salary Committee  
Chair: Gene Palmer

The charge of the Salary Committee is to compile comparative data and make a salary proposal each year on behalf of the administrative staff.

Scholarship Committee  
Chair: Carmen Castro-Rivera

The charge of the Scholarship Committee is to administer all aspects of the administrative staff student scholarship program including advertising, selection and presentation of the scholarship.
December 10, 1997

MEMORANDUM

TO: President Ribeau

FROM: Veronica Gold, Chair
Constituent Group's Caucus (CGC)

RE: The March 18, 1998 Meeting of the President's Panel

At the most recent meeting of the CGC, I was asked to propose for your consideration that the Vice Chairs of the Administrative Staff Council and the Classified Staff Council be invited as guests to the March 18, 1997 meeting of the President's Panel. Among the reasons for this request are:

- the Amendments and Bylaws Committee is occupied with other Charter amendments and currently cannot attend to this amendment to expand the membership of the President's Panel,
- you indicated your support for the change in the composition of the President's Panel to include the Vice Chairs of these Councils,
- the Vice Chairs of these Councils should become familiar with campus-wide issues and this forum provides that opportunity,
- since you chair the meeting and have invited guests in the past, perhaps you would consider inviting these individuals, and
- there is widespread support among CGC members for this request.

Thank you for your consideration of this request. If you have any questions, please contact me at 372-2751.

xc: CGC members
    file
December 22, 1997

MEMORANDUM

TO: Sidney Ribeau
    President

FROM: Bob Holmes, Chair
       Faculty Senate

RE: President's Panel Meeting of March 18, 1998

I concur with Veronica Gold's letter of December 10 suggesting that the vice chairs of the Administrative Staff Council and Classified Staff Council be invited as guests to the next meeting.

In addition to the reasons specified in Veronica's letter, I would offer one more: assuming a charter amendment adding the vice chairs has been passed by the Senate and approved by the Board, it could not take effect until the next academic year.

xc: CGC members
MEMORANDUM

February 16, 1998

TO: Deb Boyce
    Vice Chair of Administrative Staff Council
    Jay Samelak
    Vice Chair of Classified Staff Council

FROM: Sandra A. MacNevins
      President's Liaison to Campus Constituent Groups

SUBJECT: President’s Panel Meeting on March 18, 1998

The Constituent Group Caucus Chair, Veronica Gold, forwarded a letter to President Ribeau requesting that the Vice Chairs of Administrative Staff Council and Classified Staff Council be invited to participate in the March 1998 meeting of the President’s Panel. Dr. Gold indicated that the Amendments and Bylaws Committee of the Faculty Senate will be reviewing an amendment to the University Charter in order to permanently appoint the Vice Chairs of all constituency groups to the President’s Panel.

President Ribeau has indicated in the past that he supports this change in the composition of the Panel and he would be delighted to extend an invitation to you to attend the March 18, 1998, meeting at 2:30 p.m. in the Chart Room. Please confirm with Jan Wasserman, the President’s secretary, if you will be able to attend.

A memorandum from the President was mailed to all members of the Panel on February 2 inviting each constituent group to submit two agenda items in advance to the President’s Office for discussion at the Panel meeting. Please work with the Chair of your constituent group to prepare agenda items for the Panel discussion.

Please let me know if you have any questions or concerns.

cc: John Woods, Constituent Group Caucus, Chair
    Veronica Gold, Past-Chair, Constituent Group Caucus
    Duane Whitmire, Chair, Administrative Staff Council
    Faith Olson, Chair, Classified Staff Council
Memorandum

To: Dr. Charles R. Middleton, Provost and Vice President for Academic Affairs

From: Dr. Duane E. Whitmire, Chair
      Administrative Staff Council

Re: Administrative Staff Salary Recommendations for 1998-99

March 6, 1998

Below please find the salary recommendations for administrative staff for 1998-99 as passed in its amended form by the Administrative Staff Council at the March 5, 1998 meeting.

1. Improve BGSU administrative staff salary levels relative to Ohio institutions similar to BGSU. Specifically, Miami, Kent and Ohio University.

2. Provide a base salary increase for all administrative staff members that will allow each person to maintain their relative position in their salary range. Such as, if the average salary increase is 3% then by Administrative Staff Compensation Plan, Policy #9, the ranges will increase by 2%.

Amendment - While the pay ranges increase annually at 1% less than the total raise (combination of merit and across the board increase), it is recommended administrative staff receive an across the board increase equivalent to the increase in the pay range. For example, if the total raise is 3% and the pay range increases by 2%, the across the board raise should be 2%. This prevents administrative staff from moving backward in the pay range and possibly falling below the minimum.

3. If additional money becomes available for increases, then it should be allocated to meritorious administrative staff employees progressively through the ranks.

If you have any questions about this recommendation, please feel free to contact any member of the ASC Leadership Team or Gene Palmer, Chair of the ASC Salary Committee.

pc: Deborah Boyce, Vice Chair of Administrative Staff Council
    Judy Donald, Secretary of Administrative Staff Council
    Gene Palmer, Chair of Administrative Staff Council Salary Committee
President's Cabinet - The President's Cabinet is composed of the president, the four vice presidents, the special assistant to the president, the general counsel, the administrative assistant to the president, and the secretary to the Board of Trustees and other staff members invited at the request of the President. The Cabinet meets regularly at the request of the president to advise the latter on all significant policy and procedure issues facing the University.

President's Panel - President's Panel is composed of the President, the Vice President for Academic Affairs, Administrative Staff Council Chair or appointee, Classified Staff Council Chair or appointee, an administrator appointed by the President, Faculty Senate Chair, Vice Chair, and Secretary, one faculty member elected by the Faculty Senate, three undergraduate students appointed by Undergraduate Student Government, and one graduate student appointed by Graduate Student Senate. President's Panel meets at least once each semester during the academic year to advise the President on matters concerning the welfare of the University and of the members of the University community.
INTRODUCTION AND RATIONALE
In order for Bowling Green State University (BGSU) to attract and retain qualified administrative staff employees, it is BGSU's policy to maintain fair and competitive grade levels and pay ranges without regard to race, sex, color, national origin, religion, creed, age, marital status, mental or physical disability, or veteran status.

The purpose of the Administrative Staff Compensation Plan is to establish a system that reflects

- Relationships between positions and their worth
- The principles of equitable compensation
- Competition with the external employment market

SCOPE
These policies and procedures apply to all covered administrative staff positions and supersede all previous written or unwritten practices. The ongoing responsibility for the administration of the Administrative Staff Compensation Plan (Plan) is assigned to the Assistant Provost for Human Resources.

I. Objectives
It is the intent of the Administrative Staff Compensation Plan to

- Administer the Plan in accordance with the general policies of the University
- Provide a compensation plan that is internally equitable and externally competitive with the market
- Ensure equitable compensation for positions requiring similar educational levels, experience levels, skills, effort, working conditions, and levels of responsibilities
- Ensure that the administration of the position evaluations and grade level assignments is consistent and uniform throughout the University
- Provide for a review process that will address inequities
- Allow for the maintenance of competitive grade levels
- Provide policies and procedures which ensure that the Plan will be equitably and efficiently administered

II. Definition of Terms
The following terms are used in the Administrative Staff Compensation Plan:

A. Administrative Compensation Working Group
The Administrative Compensation Working Group is comprised of all the Vice-Presidents, a representative from legal counsel's office, and a representative from the President's office. This group routinely reviews issues regarding the Plan and decides the outcome of the Appeals process. This group also makes decisions about non-compensation grievances.

B. Administrative Staff Advisory Team Members
The Administrative Staff Advisory Team is comprised of 15 administrative staff members selected by the Administrative Staff Council (ASC) Executive Committee. Team members will serve three year terms. The
Team collaborates with Human Resources in the re-evaluation of Position Analysis Questionnaires. The Team is trained by Human Resources, past administrative staff members of the Appeals Committee, and past members of the Administrative Staff Advisory Team to analyze, evaluate, and recommend a grade level (numeric ranking) for a position within the Plan. Each time an administrative staff position is re-evaluated, Human Resources selects two members from the Team to participate in the process. These members represent two different vice-presidential areas. Members of the Team also participate in the Conciliation/Appeals process. Team members who participate in the re-evaluation of a position are not eligible to serve on any Appeals Board for that position. Members of this Team also participate in the Conciliation/Appeals process for non-compensation grievances.

C. Grade Level
The grade level is the numeric ranking of administrative staff positions from 5 to 23.

D. Human Resources/Administrative Staff Advisory Team
Two members of the Human Resources staff and the two members selected from the Administrative Staff Advisory Team comprise the HR/ASC Advisory Team. This combined team is responsible for analyzing, evaluating, and recommending a grade level whenever an administrative staff position is re-evaluated.

E. Pay Range
The pay range is the compensation for a particular grade level. Each pay range has a designated minimum, midpoint, and maximum. In 1997/98, for example, in grade level 14 the minimum is $30,940, the midpoint is $39,449, and the maximum is $47,957.

F. Position Analysis Questionnaire
The Position Analysis Questionnaire is the instrument used to describe the position responsibilities. This questionnaire is used by the HR/ASC Advisory Team and/or Human Resources to determine the grade level of an administrative staff position based upon the level of knowledge and experience, creativity and complexity, impact on the institutional mission, internal and external contacts, and leadership. The Position Analysis Questionnaire must be completed in order for any administrative staff position to be created and/or changed.

III. Policies
The following policies have been established for the maintenance and management of the Administrative Staff Compensation Plan.

A. New Administrative Staff Hire
New administrative staff generally are hired between the minimum and midpoint of a grade level. A salary assigned above the midpoint requires prior approval by the area Vice-President, after consultation with the Offices of Human Resources and Affirmative Action. (Number 2 - Approved by Board of Trustees, September 13, 1996.)

B. Upgrade
Definition:
A position is re-evaluated and assigned to a higher grade level as a result of significant expansion in the position’s existing duties and responsibilities.

Policy:
The incumbent is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Number 3 - Approved by Board of Trustees, September 13, 1996.)

C. Promotion
Definition:
An incumbent moves from a position requiring a certain level of skill, effort, and responsibility to a position in a higher grade level requiring a significantly greater degree of skill, effort, and responsibility.
Policy:
When an employee is promoted, she/he is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Point 4 - Approved by Board of Trustees, September 13, 1996.)

D. Interim/Acting Positions
Definition:
A staff member is assigned to a position in a higher grade level on an interim/temporary/acting basis.

Policy:
If the assignment is longer than 30 calendar days, the staff member receives a premium for the time served equal to at least a 5% increase in salary or the minimum for the interim grade level, whichever is greater. (Point 5 - Approved by Board of Trustees, September 13, 1996.)

E. Demotion
Definition:
An incumbent staff member moves from a position requiring a certain level of skill, effort, and responsibility to another position in a lower grade level requiring a lesser degree of skill, effort, and responsibility.

Policy:
When a demotion occurs, the incumbent’s salary is reduced to a level in the lower pay range equivalent to his/her level in the original pay range. (Point 6 - Approved by Board of Trustees, September 13, 1996.) The President in consultation with the area Vice-President and Human Resources must approve any exceptions to this policy.

F. Downgrade
Definition:
A position is reassigned to a lower grade level as a result of significant reduction in the position’s existing duties and responsibilities.

Policy:
When a position downgrade occurs, the incumbent’s salary is reduced to a level in the lower pay range equivalent to his/her level in the original pay range. The President in consultation with the area Vice-President and Human Resources must approve any exceptions to this policy.

G. Transfer
Definition:
An incumbent staff member moves from a position requiring a certain level of skill, effort and responsibility to another position requiring the same degree of skill, effort, and responsibility which is assigned to the same grade level.

Policy:
When a transfer occurs, normally the incumbent’s salary will not be adjusted. (Point 7 - Approved by Board of Trustees, September 13, 1996.) The President in consultation with the area Vice-President and Human Resources must approve any exceptions to this policy.

H. Market Exceptions
Definition:
A market exception is a special premium established for particular positions when unusual market conditions exist causing excessive turnover, salary midpoints well below market average, and/or failure of current salary to attract qualified candidates.

Policy:
A special market premium may be established for these positions. (Point 8 - Approved by Board of Trustees, September 13, 1996.)
I. Pay Above Maximum

Policy:
Administrative staff salaries are capped at the maximum or above the maximum of a pay range. However, staff whose salaries are currently at or above the maximum are exempt for a period of three years. Effective July 2000, the salaries of any staff still above maximum will be frozen until such time as those salaries are within his/her range. If, at any time during the three years, a staff member's salary should fall within range, the exemption ceases to apply to that staff member and the capped maximum will be enforced. (Point 10 - Approved by Board of Trustees, September 13, 1996.)

Staff who are at the maximum will be considered for a merit increase not to exceed the percentage adjustment of the pay range.

Staff above the maximum are eligible each year for a one-time, merit-based bonus not to exceed the percentage of the salary pool designated for merit each year. This will occur only when the Board of Trustees authorizes bonuses and will not be added to base salaries.

J. Progression Through the Pay Range

Definition:
Progression through a pay range is the method by which an incumbent moves through his/her assigned pay range.

Policy:
Staff progress through pay ranges based on meritious performance. Human Resources, in conjunction with the Administrative Staff Council Executive Committee, will develop by the year 2000 criteria and a process for staff to reach the midpoint of a pay range.

Note: Even though the pay ranges increase annually at 1% less than the total increase (combination of merit and across-the-board increases), it is recommended that staff receive an across-the-board increase equivalent to the increase in the pay range. For example, if the total increase is 5% and the pay range increases by 2%, the across-the-board increase should be 2%. This prevents staff from moving backward in the pay range and possibly falling below the minimum of that range. (This paragraph will be eliminated when it goes to the Board)

K. Title Revision

Policy:
When a request for a title change is needed to more accurately reflect position responsibilities, a Position Analysis Questionnaire is completed and forwarded to Human Resources in accordance with established procedures. If the position re-evaluation does not result in a higher grade level, but the title accurately reflects the responsibilities, the HR/ASC Advisory Team may recommend that the title be changed. No title change occurs without approval from the supervisor, area Vice-President and Human Resources.

L. Salary Range Adjustments

Policy:
Effective 1997-98, the ranges for each grade level will be adjusted in a three-year recurring cycle. In the first two years of the cycle, the pay range of each grade level will move up annually by an amount that is 1% less than the average salary increase paid to staff that year. (Number 9 - Approved by Board of Trustees, September 13, 1996.)

Every third year beginning with 1999-2000, the University will re-evaluate the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in accordance with that re-evaluation. (Point 9 - Approved by Board of Trustees, September 13, 1996.)

IV. Administrative Compensation Plan Position Evaluation/Re-evaluation Processes

The position evaluation process is the method by which positions are evaluated against a uniform set of criteria and assigned to established grade levels and appropriate pay ranges. Human Resources conducts the evaluations for new positions. Human Resources, in consultation with the Administrative Staff Advisory Team, conducts the re-evaluation of existing positions. It is anticipated positions will be
re-evaluated no more than once every two years. Position evaluations/re-evaluations are normally completed in twelve (12) weeks unless there is an agreement to extend the timelines.

A. Positions are evaluated when one of the following occurs:

- A new position is created. A supervisor, area head, dean, or Vice-President, in consultation with Human Resources, is responsible for submitting a completed Position Analysis Questionnaire to Human Resources.

- A position becomes vacant. A supervisor, area head, dean, or Vice-President, in consultation with Human Resources, is responsible for submitting a completed Position Analysis Questionnaire to Human Resources.

B. Positions are re-evaluated when one of the following occurs:

- A significant change in responsibilities occurs or is proposed in existing positions. Re-evaluations are initiated by the incumbent or the supervisor submitting a completed Position Analysis Questionnaire to Human Resources.

- Reorganization occurs. Re-evaluations are initiated by an area head, dean or area Vice-President prior to the reorganization and in consultation with Human Resources. Reorganization may result in significant changes in position responsibilities.

Re-evaluation Process for Administrative Staff Positions:

1. The initiator of the review (staff member, supervisor, area head, or area Vice-President) notifies Human Resources in writing that a position needs to be re-evaluated. Human Resources sends a Position Analysis Questionnaire and Guidelines for Position Evaluation either through campus mail or electronic format.

2. The initiator of the review (employee, supervisor, area head, or area Vice-President) completes the Questionnaire. If the initiator is the employee, the completed Questionnaire is forwarded to both the immediate supervisor and the second level supervisor for signature and comment. When an initiator is a supervisor, area head, or area Vice-President, the supervisor meets with the incumbent to discuss position responsibilities and obtain signatures on the Questionnaire. The supervisor comments, signs, and forwards the Questionnaire to the second level supervisor. Supervisor and employee retain a copy.

3. Upon receipt of the Questionnaire, the second level supervisor evaluates, comments, signs, and forwards to Human Resources.

4. Upon receipt of the completed Position Analysis Questionnaire, Human Resources logs in and begins a tracking/timeline. Human Resources reviews all documents for completeness, gathers additional information as needed, and distributes the documents to the HR/ASC Advisory Team.

5. The HR/ASC Advisory Team analyzes, evaluates, and recommends a grade level based on the established criteria. In the event the HR/ASC Advisory Team requests additional information, Human Resources gathers the additional information and forwards to the Team.

6. Human Resources forwards the results of the re-evaluation to the appropriate Vice-President for consideration.

7. The Vice-President reviews all documents and forwards a written decision about the position to Human Resources.

8. Following the Vice-Presidential decision, Human Resources forwards copies of the re-evaluation results and the factor sheet to the employee and the appropriate supervisory structure. Additional information can be requested from Human Resources.
9. Administrative staff or initiators who do not agree with the determination meet with the immediate supervisor and Human Resources to attempt resolution. If there is no agreement, the employee may follow the Conciliation/Appeals process.

V. Conciliation/Appeals Process

The purpose of the Conciliation/Appeals Process is to ensure prompt resolution of disagreements regarding the results of position re-evaluations and subsequent placement in the Plan.

There are three steps in the process:
1. Initiator requests a Conciliation Meeting
2. Initiator requests an Appeals Board
3. Initiator requests a Presidential Appeal

A. Conciliation Meeting

The Conciliation Meeting, facilitated by the Assistant Vice Provost for Human Resources/designee, provides the initiator and the area Vice-President with an opportunity to resolve the complaint in a collaborative, informal fashion. Participants in the meeting include:

- Employee
- Immediate Supervisor
- Area Vice-President
- ASC Review Team member from the initial re-evaluation team
- Assistant Vice-Provost for Human Resources/designee

The process is normally completed within four (4) weeks unless there is agreement to extend the timelines.

Process:
1. Within three (3) working days after meeting with the immediate supervisor and Human Resources, the initiator informs Human Resources of the intent to enter into conciliation.
2. Upon receipt of the request for conciliation, Human Resources begins a tracking/timeline.
3. Within ten (10) working days of the request for conciliation, Human Resources schedules the meeting.
4. Within ten (10) working days after the meeting is scheduled, the meeting will take place to attempt resolution.
5. Human Resources is responsible for reporting, in writing, the outcome of the meeting to all involved within ten (10) working days.
6. If the meeting results in a change of grade level for the position in question, Human Resources negotiates the effective date of the change with the area Vice-President. No action is necessary if the meeting results in no change in the position.
7. If the initiator is not satisfied with the decision, she or he can request an Appeals Board.

B. Appeals Board

The Appeals Board provides the initiator an opportunity to achieve resolution through the recommendation of peers. The Appeals Board consists of five (5) members of the Administrative Staff Advisory Team who have not been involved in the re-evaluation or conciliation process. The process is normally completed within ten (10) weeks unless there is a decision to extend the timeline.
Process:
1. Within five (5) working days of conciliation, the initiator informs Human Resources and the area Vice-President, in writing, of the intent to appeal.

2. Within three (3) working days of notification of the intent to appeal, Human Resources forwards the Appeals Packet to the initiator.

3. Within ten (10) working days of receiving the Appeals Packet, the initiator completes the required documentation for the appeals and forwards to Human Resources.

4. Within the same ten (10) working days, Human Resources selects five (5) Administrative Staff Advisory Team members for the Appeals Board. Advisory Team members who participated in the re-evaluation or conciliation process are not eligible to serve on the Appeals Board.

5. Upon receipt of the completed documentation, Human Resources begins a tracking/timeline.

6. Within five (5) working days of receiving the completed documentation, Human Resources forwards the documentation submitted by the initiator to the Appeals Board.

7. Within ten (10) working days of receipt of the completed documentation, the Appeals Board meets and reviews the issue.

8. Within five (5) working days of the review, the Appeals Board submits the recommendation in writing to Human Resources, initiator, area Vice-President and Administrative Compensation Working Group.

9. Within twenty (20) working days of receiving the recommendation of the Appeals Board, the Administrative Compensation Working Group, without the area Vice-President where the appeal occurs, reviews the recommendation of the Appeals Board and makes a decision.

10. Within five (5) working days of making a decision, the Administrative Compensation Working Group will submit the decision in writing to the initiator, supervisor, area Vice-President, and Human Resources.

11. If the decision results in a change of grade level, Human Resources negotiates the effective date of the change with the area Vice-President.

   If the initiator or Vice-President is not satisfied with the decision, she/he can appeal to the President.

C. Presidential Appeal

1. Within five (5) working days of receiving the decision of the Administrative Compensation Working Group, the initiator appeals in writing to the President of the University.

2. Within ten (10) working days after receiving the appeal, the President or designee responds in writing to the initiator, supervisor, area Vice-President, Administrative Compensation Working Group, and Human Resources.

3. The decision of the President or designee is final.
Conciliation/Appeals for Non-Compensation Complaints
(replaces pages 30-34 in current handbook)
March 31, 1998

Purpose
The purpose of the Conciliation/Appeals Board procedure is to ensure the prompt resolution of complaints by administrative staff members regarding the terms and conditions of employment, benefits, or other job-related concerns that have not been resolved with the immediate supervisor. A staff member may pursue this process for any or all of the following:

- Failure to follow policies and provisions enunciated in the Administrative Staff Handbook
- Inadequate or inequitable consideration of professional competence
- Termination of appointment for cause

Non-renewal of contract for an administrative staff member of three or more years must be reviewed by the appropriate Vice-President. The decision not to continue the contract of an administrative staff member is not grievable and, therefore, not subject to this procedure.

Any grievance related to the Administrative Staff Compensation Plan will be handled through the procedure specifically for compensation issues.

Scope
These procedures apply to all covered administrative staff positions and supersede all previous written or unwritten practices. The ongoing responsibility for the administration of these procedures is assigned to the Assistant Provost for Human Resources.

There are three steps in the process:
1. Staff member request a Conciliation Meeting
2. Staff member request an Appeals Board
3. Staff member request a Presidential Appeal

Definition of Terms
The following terms are used for non-compensation related complaints:

A. Administrative Compensation Working Group
The Administrative Compensation Working Group is comprised of all the Vice-Presidents, a representative from legal counsel’s office, and a representative from the President’s office. This group routinely reviews issues regarding the Administrative Staff Compensation Plan and decides the outcome of the Appeals process. This group also makes decisions about non-compensation grievances.

B. Administrative Staff Advisory Team Members
The Administrative Staff Advisory Team is comprised of 15 administrative staff members selected by the Administrative Staff Council (ASC) Executive Committee. Team members will serve three year terms. The Team collaborates with Human Resources in the re-evaluation of Position Analysis Questionnaires. The Team is trained by Human Resources, past administrative staff members of the Appeals Committee, and past members of the Administrative Staff Advisory Team to analyze, evaluate, and recommend a grade level (numeric ranking) for a position within the Plan. Each time an administrative staff position is re-evaluated, Human Resources selects two members from the Team to participate in the process. These members represent two different vice-presidential areas. Members of the Team also participate in the Conciliation/Appeals process. Team members who participate in the re-evaluation of a position are not eligible to serve on any Appeals Board for that position. Members of this Team also participate in the Conciliation/Appeals process for non-compensation grievances.
I. Conciliation Meeting

The Conciliation Meeting, facilitated by the Assistant Vice Provost for Human Resources/designee, provides the staff member and the area Vice-President with an opportunity to resolve the complaint in a collaborative, informal fashion. Participants in the meeting include

- Employee
- Immediate Supervisor
- Area Vice-President
- ASC Review Team member
- Assistant Vice-Provost for Human Resources/designee

The process is normally completed within four (4) weeks unless there is agreement to extend the timelines.

Process:

1. The staff member will inform Human Resources and the immediate supervisor in writing that she/he wants to enter into conciliation.

2. The staff member will provide Human Resources with all necessary documentation at the time of the request.

3. Upon receipt of the request to enter conciliation, Human Resources begins a tracking/timeline.

4. Within ten (10) working days of receiving the request to enter conciliation, Human Resources forwards the documentation and schedules the meeting.

5. Within ten (10) working days after the meeting is scheduled, the meeting will take place to attempt resolution.

6. Human Resources is responsible for reporting, in writing, the outcome of the meeting to all involved within ten (10) working days.

7. If no resolution is reached, and the staff member is not satisfied with the decision, she/he can proceed to the Appeals Board.

II. Appeals Board

The Appeals Board provides the staff member an opportunity to achieve resolution through the recommendation of peers. The Appeals Board consists of five (5) members of the Administrative Staff Advisory Team. The process is normally completed within ten (10) weeks unless there is a decision to extend the timeline.

Process:

1. Within five (5) working days of conciliation, the staff member informs Human Resources, the supervisor, and the area Vice-President, in writing, of the intent to appeal.

2. Within three (3) working days of notification of the intent to appeal, Human Resources forwards the Appeals Packet to the staff member.

3. Within ten (10) working days of receiving the Appeals Packet, the staff member completes the required documentation for the appeals and forwards to Human Resources.
4. Within the same ten (10) working days, Human Resources selects five (5) Administrative Staff Advisory Team members for the Appeals Board.

5. Upon receipt of the completed documentation, Human Resources begins a tracking/timeline.

6. Within five (5) working days of receipt of the completed documentation, Human Resources forwards the documentation submitted by the staff member to the Appeals Board.

7. Within ten (10) working days after receiving the documentation, the Appeals Board meets and reviews the issue.

8. Within five (5) working days of the review, the Appeals Board submits the recommendation in writing to Human Resources, staff member, area Vice-President and Administrative Compensation Working Group.

9. Within twenty (20) working days of receiving the recommendation of the Appeals Board, the Administrative Compensation Working Group, without the area Vice-President where the grievance occurs, reviews the recommendation of the Appeals Board and makes a decision.

10. Within five (5) working days of a decision, the Administrative Compensation Working Group will submit the decision in writing to the staff member, supervisor, area Vice-President, and Human Resources.

If the staff member or Vice-President is not satisfied with the decision, she/he can appeal to the President.

III. Presidential Appeal

1. Within five (5) working days of receiving the decision of the Administrative Compensation Working Group, the staff member appeals, in writing, to the President of the University.

2. Within ten (10) working days after receiving the appeal, the President or designee responds in writing to the staff member, supervisor, area Vice-President, Administrative Compensation Working Group, and Human Resources.

3. The decision of the President or designee is final.
Administrative Staff Handbook Changes

Change to Fee Waiver Policy

Section V. Retired Administrative Staff Members Part B. Benefit

Current:

Benefit. Retired administrative staff members may take courses on a space available basis. In addition, dependents of retirees may enroll in classes without payment of tuition fees for a period of five years following the employee’s retirement.

Change to:

Benefit. Retired administrative staff members may take courses on a space available basis. In addition, dependents may enroll in classes without payment of tuition fees as long as they satisfy the requirements for dependent status.

Birth/Adoption Leave

Replace Maternity/Paternity/Adoption Leave page 42-43 - eliminate section on paternity/adoption/leave

1. Each staff member is eligible for natal (change to birth/adoption) leave up to six months.

2. The six month leave need not be taken as consecutive days if mutually agreeable to the administrative staff member and the immediate supervisor.

3. Accrued sick leave, accrued vacation credit and a leave of absence without pay can be used during this six month period. A staff member may use any or all of the accrued vacation credit and/or accrued sick leave or personal leave before going on a leave of absence without pay.

4. A staff member will notify, in writing, the supervisor and the Office of Personnel Services (Human Resources), prior to the start of the leave, as to the number of days to be taken as sick leave, the number of days to be taken as vacation and number of days to be taken as a leave of absence without pay.

5. Should a staff member decide not to return to the University following leave, the staff member must notify the supervisor, in writing, no less than 30 calendar days preceding the scheduled return to work.

6. Staff members taking leave are guaranteed their positions and job title upon return. If these proposed changes are adopted, then the section on Paternity/Adoption Leave would be deleted from page 43 of the current handbook.

Adopted ASC 1/19/95
RE-EVALUATION, CONCILIATION, APPEALS FLOW

Re-evaluation
Human Resources & ASC Advisory Team

Recommendation to Area Vice President.
Decision by Vice President

If agreement - ends

Supervisor Meeting
Employee, Human Resources, Supervisor

If agreement - ends

Conciliation
Vice President, Employee, Supervisor, Assistant Provost for Human Resources, ASC Review Team

If agreement - ends

ASC Appeals
5 ASC Advisory Members

Administrative Compensation Working Group
VP's, Legal Counsel, President's designee (minus the VP of the area)

If resolved - ends

President or Designee
Final
<table>
<thead>
<tr>
<th>Years</th>
<th>1st Difference</th>
<th>Mid Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 mo</td>
<td>245285</td>
<td>604722</td>
</tr>
<tr>
<td>9,10, other</td>
<td>13164</td>
<td>50154</td>
</tr>
<tr>
<td>athletic (10 too)</td>
<td>24430</td>
<td>72378</td>
</tr>
<tr>
<td>part-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>282819</td>
<td>727264</td>
</tr>
<tr>
<td>4-6 years</td>
<td>128</td>
<td>249</td>
</tr>
<tr>
<td>12 mo</td>
<td>92371</td>
<td>251125</td>
</tr>
<tr>
<td>9,10, other</td>
<td>26125</td>
<td>63532</td>
</tr>
<tr>
<td>athletic (10 too)</td>
<td>7751</td>
<td>17190</td>
</tr>
<tr>
<td>part-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>126647</td>
<td>337897</td>
</tr>
<tr>
<td>7-9 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 mo</td>
<td>47096</td>
<td>159051</td>
</tr>
<tr>
<td>9,10, other</td>
<td>868</td>
<td>11912</td>
</tr>
<tr>
<td>athletic (10 too)</td>
<td>8611</td>
<td>21719</td>
</tr>
<tr>
<td>part-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>56375</td>
<td>192682</td>
</tr>
<tr>
<td>10+ years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 mo</td>
<td>61069</td>
<td>320768</td>
</tr>
<tr>
<td>9,10, other</td>
<td>*****</td>
<td>5553</td>
</tr>
<tr>
<td>athletic (10 too)</td>
<td>*****</td>
<td>6237</td>
</tr>
<tr>
<td>part-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>61089</td>
<td>332558</td>
</tr>
<tr>
<td>Total 7-9, 10+</td>
<td></td>
<td>525240</td>
</tr>
</tbody>
</table>
Hi All,

There have been some changes to the compensation plan and non-compensation plan that I want to pass along to you prior to the meeting on Thursday. The changes represent some additional work done with HR and the vice presidents. They are still doing some last minute reviews, but hopefully there will not be any major changes in the document that goes to the Board.

The collaboration process has come a long way, and I am very excited that we can impact handbook changes for the greater good of all staff. I welcome the change from prior years when ASC approved a document; it went to the administration and frequently was radically changed (with no conversation with ASC) before it was forwarded to the Board. Consequently, there are many sections of our handbook that are unclear, don’t even make sense and certainly are not in our best overall interest. It is extremely important to have our compensation plan, in particular, very clear so it can work on our behalf.

The major change in the non-salary grievance process is that we have removed the appeal process. Any grievance that is not resolved through reconciliation will go directly to the Pres. The reason is that the administration did not feel it was necessary to involve other vice presidents in non-salary issues. PWC concurs with this and feels it can be easily eliminated.

In the compensation there are some minor changes in language.

In both documents another major change is that the administration did not want the president to have a timeline to reply. We have changed the timeline for the pres to 30 working days. PWC felt there needs to be accountability. This is still up in the air, but we are hopeful that this will fly.

Also in both documents the timelines have been changed from working days to calendar days for clarification. PWC agrees.

If you are unable to retrieve these documents, in word 6 rich text format, please call me at 6608. I don’t remember those of you who could not download the last set.

I hope you have looked over the documents and will come prepared to ask questions, express any concerns and ultimately vote on these documents so they can go to the Board.

Please remember that ASC will meet at 12:30 on Thursday because of the Board meeting.
Thanks

Pat

Attachment converted: Macintosh HD:Compensation Plan 5/5/98.rtf 1 (RTF /MSWD) (000186A4)
Attachment converted: Macintosh HD:Nonsalary 5/5.rtf 1 (RTF /MSWD) (000186A9)

Pat Green
Administrative Director
Center for Photochemical Sciences
Bowling Green State University
Bowling Green, Ohio 43403
Phone: 419-372-6008
Fax: 419-372-6069
e-mail: pgreen@bgnet.bgsu.edu
http://www.bgsu.edu/departments/photochem
The Ombuds Office initiative has been on-going since early last summer, when the Constituent Group Caucus (CGC) began researching the types of ombuds services other public universities in Ohio provided to its constituencies.

This fall, the Graduate Student Senate (GSS) formed an adhoc committee on "Conflict in the Classroom" comprised of interested graduate and undergraduate students, faculty, and staff members here at the University. As a result of that group's efforts, the GSS passed a resolution urging the creation of an Ombuds Office at BGSU.

Dr. Joyce Gromko, Associate Dean of the Graduate College (who has been serving as an unofficial ombudsperson for graduate students) met with the CGC in April and indicated that the administration would like to see if there was support for this idea from all of the constituent groups.

What follows is a resolution drafted by the ASC Leadership Team and approved by the ASC Executive Committee for your review. If you have any suggested changes, please email them by Friday May 29, to whitmire@bgnet.bgsu.edu

Thank you, in advance, for your review and feedback.

Administrative Staff Council
Bowling Green State University
University Ombuds Office Resolution

WHEREAS, there have been growing concerns with respect to conflict situations on campus, including but not limited to racial, sexual, and sexual orientation harassment as well as verbal and physical assaults; and

WHEREAS, Administrative Staff Council is committed to working proactively for the welfare of all members of the University community; and

WHEREAS, currently the University offers no formal training in conflict resolution for individuals and no central office exists to help those who experience conflict situations, and

WHEREAS, an Ombuds office is an accepted and effective means of dealing with conflict situations; and

WHEREAS, Bowling Green State University is one university in the system of state institutions in Ohio that does not have an Ombuds office;

THEREFORE, BE IT RESOLVED, that the Administrative Staff Council recommends that BGSU establish an independent Ombuds office to handle student, staff, and faculty concerns.
## APPEALS PROCESS TIME LINE

**ACTIVITY** | **# of Business Days** | **Date** | **# of Days** | **Variance + or - days**
--- | --- | --- | --- | ---
1. Initiator informs HR and area Vice President in writing of the intent to appeal | Within 5 days of conciliation |  |  |  
2. HR receives from initiator the intent to appeal in writing | Logs in the date which begins the process |  |  |  
3. HR forwards the Appeals packet to the initiator of the appeal | 3 from date of written intent |  |  |  
4. Initiator completes and forwards to HR the required documentation | Within 10 from receiving packet |  |  |  
5. HR selects 5 Administrative Staff Advisory Team members for the Appeals Board. | Within 10 from receiving packet |  |  |  
6. HR forwards the initiators completed documentation to the Appeals Board | Within 5 days of receipt |  |  |  
7. Appeals Board meets to review | Within 10 days of receipt of information from HR |  |  |  
8. Appeals Board submits recommendation in writing to initiator, HR, area VP and Administrative Working Group | Within 5 days of meeting to review |  |  |  
9. | | | | |
# CONCILIATION PROCESS TIME LINE

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th># of Business Days</th>
<th>Date</th>
<th># of Days</th>
<th>Variance + or - days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Initiator of process informs HR of intent to enter into conciliation of</td>
<td>3 of meeting with HR and supervisor</td>
<td>06/04/989:36 AMdjw</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. HR receives request of conciliation</td>
<td>Logs in the date which begins the process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. HR schedules the meeting with employee, immediate supervisor, area VP, ASC Review team member from initial re-evaluation team and with Assistant Vice Provost for HR or designee</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. HR documents the outcome of meeting and sends to all participants</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# RE-EVALUATION PROCESS TIME LINE

Position: 

Outcome: 

Date: 

# of days in process (to be completed by HR):

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th># of Business Days</th>
<th>Date</th>
<th># of Days</th>
<th>Variance + or - days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. HR sends Position Analysis Questionnaire and guidelines</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. HR receives completed Position Analysis Questionnaire</td>
<td>Logs in the date which begins the process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. HR copies and distributes documents to HR/ASC Advisory Team</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. HR/ASC Team analyzes, evaluates and recommends grade level</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. HR forwards results to appropriate VP</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. VP forwards written decision regarding position to HR</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. HR copies re-evaluation results and factor sheet to employee and appropriate supervisory structure.</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. In the event of disagreement with the determination a meet with HR and supervisor to discuss.</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Appendix A
1997-98
Summary of CUPA - BGSU Average Salary
Compared to State Average

<table>
<thead>
<tr>
<th>Version</th>
<th>BGSU # of Cases</th>
<th>BGSU Average</th>
<th>CUPA Average</th>
<th>Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>MV 1.1</td>
<td>34</td>
<td>$60,426</td>
<td>$63,708</td>
<td>($3,282)</td>
<td>-5.15%</td>
</tr>
<tr>
<td>MV 2.1</td>
<td>74</td>
<td>$61,633</td>
<td>$64,580</td>
<td>($2,947)</td>
<td>-4.56%</td>
</tr>
<tr>
<td>MV 3.1</td>
<td>55</td>
<td>$59,206</td>
<td>$62,413</td>
<td>($3,207)</td>
<td>-5.14%</td>
</tr>
<tr>
<td>MV 4.1</td>
<td>27</td>
<td>$64,725</td>
<td>$68,877</td>
<td>($4,152)</td>
<td>-6.03%</td>
</tr>
<tr>
<td>MV 5.1</td>
<td>80</td>
<td>$60,216</td>
<td>$63,551</td>
<td>($3,335)</td>
<td>-5.25%</td>
</tr>
<tr>
<td>MV 6.1</td>
<td>65</td>
<td>$58,020</td>
<td>$61,619</td>
<td>($3,599)</td>
<td>-5.84%</td>
</tr>
</tbody>
</table>
### Appendix B

#### 1997-98

**Summary of Comparison of BGSU Salaries to Other State Schools Using Common Positions**

(MV 2.1)

<table>
<thead>
<tr>
<th>School</th>
<th># of Positions</th>
<th>Average Salary</th>
<th>BGSU Average Salary</th>
<th>Difference</th>
<th>%Difference from BGSU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ohio State</td>
<td>46</td>
<td>$78,476</td>
<td>$57,124</td>
<td>$21,352</td>
<td>37.38%</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>41</td>
<td>$73,362</td>
<td>$62,028</td>
<td>$11,334</td>
<td>13.27%</td>
</tr>
<tr>
<td>Miami</td>
<td>46</td>
<td>$62,401</td>
<td>$80,016</td>
<td>$17,615</td>
<td>21.93%</td>
</tr>
<tr>
<td>Kent</td>
<td>43</td>
<td>$59,801</td>
<td>$58,325</td>
<td>$1,476</td>
<td>2.53%</td>
</tr>
<tr>
<td>Akron</td>
<td>43</td>
<td>$59,669</td>
<td>$58,711</td>
<td>$953</td>
<td>1.63%</td>
</tr>
<tr>
<td>BGSU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleveland</td>
<td>43</td>
<td>$58,922</td>
<td>$58,973</td>
<td>($57)</td>
<td>-0.10%</td>
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<tr>
<td>Wright State</td>
<td>47</td>
<td>$59,162</td>
<td>$61,587</td>
<td>($2,425)</td>
<td>-3.91%</td>
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<tr>
<td>Youngstown</td>
<td>42</td>
<td>$52,593</td>
<td>$53,551</td>
<td>($9,958)</td>
<td>-10.18%</td>
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<tr>
<td>Toledo</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>#VALUE!</td>
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</table>
Appendix B.1

Summary of Comparison of BGSU Salaries to Other State Schools Using Common Positions (MV 3.1)

Seven Year Comparisons

<table>
<thead>
<tr>
<th>Year Pair</th>
<th>OS %</th>
<th>UC %</th>
<th>MU %</th>
<th>OU %</th>
<th>UT %</th>
<th>WS %</th>
<th>CS %</th>
<th>BG %</th>
<th>Sch % of BG</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990-1991</td>
<td>19.36%</td>
<td>10.35%</td>
<td>8.63%</td>
<td>7.99%</td>
<td>2.15%</td>
<td>-5.1%</td>
<td>-3.07%</td>
<td>-1.39%</td>
<td>13.68%</td>
</tr>
<tr>
<td>1991-1992</td>
<td>23.87%</td>
<td>12.34%</td>
<td>10.00%</td>
<td>2.25%</td>
<td>6.62%</td>
<td>2.50%</td>
<td>3.83%</td>
<td>3.56%</td>
<td>13.68%</td>
</tr>
<tr>
<td>1992-1993</td>
<td>25.08%</td>
<td>11.61%</td>
<td>8.02%</td>
<td>6.27%</td>
<td>1.92%</td>
<td>1.73%</td>
<td>1.36%</td>
<td>3.56%</td>
<td>13.68%</td>
</tr>
<tr>
<td>1993-1994</td>
<td>24.88%</td>
<td>12.45%</td>
<td>11.16%</td>
<td>6.27%</td>
<td>1.92%</td>
<td>1.73%</td>
<td>1.36%</td>
<td>3.56%</td>
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<tr>
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<tr>
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AVG Rank: 1.0, 2.1, 3.0, 5.1, 5.1, 6.5, 7.4, 7.6, 8.9, 9.0, 9.5
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**Mercer Grades**

- Mercer Min
- Mercer Max
- CUPA Average
Legions Meeting  
Wednesday April 29, 1998  
Jerome Library Conference Room

Agenda

Welcome - Deanne Snively  
Leadership Climate and Activities - Sidney Ribeau  
Challenges

Brainstorming - Dave Hyslop

Will we brainstorm on the question: -?  
To enhance our leadership climate, what is the most important step we should do immediately?

Priorities: 1997/98

Place the Student at the Heart of the BGSU Learning Community:  
Students First

Identify Learning Outcomes for BGSU Graduates:

Promote a Culture of Leadership at BGSU

Develop an Institutional Communication Plan:  
Telling our Story(ies) Internally

Develop a University Marketing Plan:  
Telling our Story(ies) Externally

Engage in Professional Development and Training of Faculty, Staff, and Administrators

Manage Enrollment: Set Retention and Recruitment Targets

Objective: Increase Student Enrollments

Funding:  
but take off  

 morning
Administrative Staff Teaching Compensation Review
Committee Report
5/21/98

COMMITTEE CHARGE

In May 1997, several concerns were brought to the attention of Administrative Staff Council relative to policies and subsequent remuneration when administration staff teach for BGSU. Initial investigation revealed compensation inconsistencies throughout the campus (e.g. some staff taught for non compensation, some received compensation at the overload rate, while others were paid as part-time faculty, etc.) Administrative Staff Council thought it worthy to pursue this issue, by creating the Ad Hoc Committee on Administrative Staff Teaching Compensation Policies (ASTCP).

COMMITTEE MEMBERS

Jan Peterson, Chair, Continuing Education
Tony Boccanfuso, SPAR
Terry Lawrence, Graduate College
Penny Nemitz, Firelands Campus
Paul Obringer, Unigraphics
Anne Saviers, International Programs
Susan Thierry, College of Musical Arts
Betty Ward, College of Arts & Sciences
Jodi Webb, First Year Experience
Paul Yon, Center for Archival Collections

REPORT

The committee convened Fall Semester and (naively) decided to initiate the investigation by surveying all Administrative Staff regarding the issue of part-time teaching compensation. A survey instrument was developed and distributed to all Administrative Staff. (A hard copy will be available at Tuesdays Executive Council Meeting)

As a result of the initial survey, the committee quickly realized the issue was far from clear. Several areas of concern were identified, and there were numerous questions within each area.

Two of the major areas identified involved the definition of teaching and the relationship of teaching responsibilities to one's job description. How is teaching defined? Are teaching and administrative responsibilities separate? Is teaching a requirement of the position?
Another area of concern identified involved the issue of compensation: how does the teaching fit in with the individual's administrative staff compensation plan (i.e. job description, etc.)? Is one paid for teaching as part of one's administrative contract, as a part-time faculty position, or as an overload administrative position?

The questions went on and on, with many of the major areas of concern overlapping, illustrating how what was thought to be a "simple question" soon becomes the proverbial "thorny issue". The issues included questions of credit versus non-credit classes; are the courses being taught as independent study, or workshops, or off-campus seminars/classes; are the courses taught voluntarily or at the request of one's supervisor, etc.

As a result of the multitude of questions raised and the different interpretations held by committee members, the committee had much difficulty reaching a consensus. In an attempt to address some of the major concerns that were raised, sub-committees were formed. Each sub-committee addressed a different issue of concern. The sub-committees met independently and afterward, the committee as a whole reconvened.

The following summarizes the committees interpretations:

**Definition of Teaching:**

- A credit course (e.g. undergraduate, graduate, workshop, seminar, summer workshop, off-campus).
- The instructor awards a grade for the course taught.
- A "formal" class is regularly held with appropriate syllabus and preparation.
- The instructor is responsible for the learning environment and office hours.

**Separation of Teaching and Administrative Responsibilities:**

- Administrative staff should request, negotiate, or be offered and sign separate administrative and teaching contracts.
- Administrative staff who teach, outside of their usual and customary work schedule, should be paid according to the same published rate scale (rate scale needs to be defined/standardized).
Issues of Accountability

The parameters on which our issues of accountability were based are as follows:

- The prescribed hours for Administrative Staff are 8 am - 5 pm unless detailed otherwise by the job requirements.
- Prescribed hours can be adjusted by the employee's supervisor.
- Administrative Staff are expected to work at least 40 hours each week.
- Administrative Staff are not permitted to accept employment from outside the University that will adversely affect fulfillment of the responsibilities and duties of the assigned position/title.

With these parameters in mind, issues of accountability and compensation to be considered if an administrative staff member teaches an academic credit course at BGSU were determined to be:

1. **TEACHING**

   - **TEACHING DURING ESTABLISHED WORK HOURS (non-job required)**
     Human Resources policies are met (see Administrative Staff Handbook).
     An employee may need to adjust their work hours so they fall into one of the following categories:

   - **TEACHING IS A JOB RESPONSIBILITY (FUNCTION OF THE JOB)**
     Human Resources policies are met (See Administrative Handbook).
     Supervisor approved
     No compensation to employee
     Could involve budget transfer between departments
     Job descriptions may need to be redefined
     Evaluation may need to be adjusted
     Work load may need to be adjusted

   - **TEACHING OUTSIDE OF ESTABLISHED WORK HOURS (job related)**
     Human Resources policies are met
     No adjustment to work hours
     Compensation is appropriate
     Supervisor involvement/approval
• **TEACHING OUTSIDE OF ESTABLISHED WORK HOURS (non-job related)**
  Human Resources policies are met (See Administrative Staff Handbook)
  Compensation received
  No supervisor approval

2. **COMPENSATION**

   A. Teaching responsibilities should be separate from all administrative responsibilities, regardless of full or part-time status of the administrative staff member.

   B. Administrative staff members who are asked to accept teaching responsibilities in addition to their administrative job assignment and who do so outside and in addition to their normal daily work schedule should be paid for teaching. Payment for teaching service should be in addition to and/or separate from the administrative salary.

   C. Teaching responsibilities above and beyond an administrative staff member's job responsibilities should be paid according to the same published rate scale* as part-time faculty and instructors who are hired from outside the university.

   D. Full-time administrative staff members who are regularly expected to teach during normal daily work hours and as part of their administrative responsibilities must have this responsibility clearly defined within their legal job description for that position. An appropriate Administrative Staff Compensation Plan level (Mercer) should also be determined in keeping with all full-time responsibilities associated with the position. It is assumed that a full-time staff member teaching during regular work hours and as part of their full-time administrative duties will not receive additional compensation for teaching.

   *rate scale to be defined/standardized

In addition to the work of the sub-committees, the following efforts were made in an attempt to help clarify some of the issues identified:

Two committee members met with Rebecca Ferguson, Assistant Provost, Human Resources, in an effort to determine if teaching credit classes was part of anyone's Administrative Staff Compensation Plan (Mercer Job Analysis/Ranking). A sample consisting of the name of five administrative staff members known to teach was submitted. The job analysis (Mercer) forms for these five staff members were reviewed by Human Resources personnel with the following findings: One staff member indicated she performed training as part of her job description. The four other administrative staff members named in the sample did not mention teaching anywhere in their job analysis. Responding to this, Human Resources indicated that teaching could be accommodated
in the Administrative Staff Compensation Plan in the leadership category; however, teaching would have to part of one's job description and goals.

Several attempts were made by the Chair to meet with the Co-Chairs of the Faculty Senate Ad Hoc Committee on Part-time Teaching; however, despite these attempts, no meeting took place.

COMMITTEE RECOMMENDATIONS

In conclusion, based on the results of the survey, the meetings of the sub-committees and the committee as a whole, the following recommendations are respectfully submitted:

- The Administrative Staff Compensation Review Committee needs to be continued for the 1998/99 year.

  The Committee should:

- Continue dialogue with Human Resources.

- Determine what are the policies of other universities in the State of Ohio.

- Identify ways to encourage BGSU administrators to adopt an equitable and standard policy and pay scale for compensating all Administrative Staff who accept teaching responsibilities.

- Continue to encourage the University to recognize the role that administrative staff play in achieving the educational goals of this institution. Administrative staff members are also educators who contribute in significant ways to making BGSU a premier learning institution, they deserve to be recognized as such.
SURVEY

Only 10% of all ASC members (N = 496) teach (N = 52)

5% of all ASC members are not compensated (N = 26) or 50% of those who do teach are not compensated.
SURVEY ON ADMINISTRATIVE STAFF TEACHING COMPENSATION
SURVEY RESULTS

496 surveys were sent -- 318 administrative staff did not return their surveys 36% response rate (N = 178)

1. Do you teach for BGSU? □ Yes □ No

Response 29% teach (N = 52)
71% do not teach (N = 126)

Of the 29% who teach the following questions were asked:

2. Do you teach □ credit classes, □ summer workshops/seminars, □ noncredit classes for Continuing Education. Check all that apply.

Response 81% teach credit course and summer credit workshops and seminars (N = 52)
19% teach noncredit classes (N = 9)

3. Do you teach each semester? □ Yes □ No If No, how frequently do you teach? __________

Response 46% teach each semester (N = 24)
51% teach with less frequency (N = 27)

4. How many credit hours do you teach each semester? __________

Response Frequency not consistent -- see responses on the survey

5. Are you compensated for teaching credit classes? □ Yes □ No

Response 50% are compensated (N = 26)
50% are not compensated (N = 26)
6. Are you compensated at the □ overload teaching rate, □ part-time faculty/teaching rate, □ the assignment is part of my administrative contract, □ I am not compensated to teach, □ my compensation situation is individualized and does not fit the aforementioned.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13.4%</td>
<td>of those who teach are compensated at the overload rate (N = 7)</td>
</tr>
<tr>
<td></td>
<td>17.3%</td>
<td>are given pt faculty compensation (N = 9) but only .69% hold faculty rank</td>
</tr>
<tr>
<td></td>
<td>32.7%</td>
<td>are compensated as part of the administrative contract</td>
</tr>
<tr>
<td></td>
<td>25.0%</td>
<td>are not paid</td>
</tr>
<tr>
<td></td>
<td>88%</td>
<td>subtotal</td>
</tr>
<tr>
<td></td>
<td>8%</td>
<td>are “Other” compensation is individualized (N = 4)</td>
</tr>
<tr>
<td></td>
<td>4%</td>
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</tr>
<tr>
<td></td>
<td>100%</td>
<td>Total</td>
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</table>

7. My administrative contract is a □ 12 month contract, □ 10 month contract, □ 9 month contract.

<table>
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<tr>
<th>Response</th>
<th>Percentage</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
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<td>75%</td>
<td>are on a 12 month administrative contract (N = 40)</td>
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<td></td>
<td>8%</td>
<td>are on a 10 month administrative contract (N = 4)</td>
</tr>
<tr>
<td></td>
<td>17%</td>
<td>are on a 9 month administrative contract (N = 9)</td>
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<tr>
<td></td>
<td>100%</td>
<td>total (N = 53)</td>
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8. Do you hold faculty rank? □ Yes □ No

<table>
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<tr>
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<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10%</td>
<td>do hold faculty rank (N = 5)</td>
</tr>
<tr>
<td></td>
<td>90%</td>
<td>do not hold faculty rank (N = 47)</td>
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</table>

9. What department and college do you teach in?

Response varies -- see survey comments

10. Do you teach at the □ undergraduate level, □ graduate level, □ both levels.

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<th>Description</th>
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<tr>
<td></td>
<td>73%</td>
<td>teach exclusively undergraduate courses (N = 38)</td>
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<td></td>
<td>5.8%</td>
<td>teach exclusively graduate courses (N = 3)</td>
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<tr>
<td></td>
<td>9.6%</td>
<td>teach both undergraduate and graduate courses (N = 5)</td>
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<td></td>
<td>88.4%</td>
<td>subtotal</td>
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<tr>
<td></td>
<td>11.5%</td>
<td>didn’t respond to the question (N = 6)</td>
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<tr>
<td></td>
<td>99.9%</td>
<td>total respondents (N = 52)</td>
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</table>
11. Does your teaching assignment take place ☐ before your customary work hours, ☐ during your customary work hours, ☐ after your customary work hours, ☐ weekends ☐ combination of before customary work hours/during customary work hours/after customary work hours/weekends.

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<td>Teach during customary</td>
<td>44.23%</td>
<td>work hours (N = 23)</td>
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<td>Teach after customary</td>
<td>19.23%</td>
<td>work hours (N = 10)</td>
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<tr>
<td>Teach weekends</td>
<td>0%</td>
<td></td>
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<tr>
<td>Teach combination</td>
<td>36.5%</td>
<td>of during customary work hours/after/weekends (N = 19)</td>
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12. Additional information/comments/opinions:

See survey
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<th>Case #</th>
<th>Teach for BGSU</th>
<th>Types of Classes Taught</th>
<th>Teach each Semester?</th>
<th>Semester</th>
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<th>Compensation Rate</th>
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<tr>
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<td>Yes / No</td>
<td>Yes / No</td>
<td>Yes / No</td>
<td>Yes / No</td>
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<td></td>
<td></td>
<td>noncredit/CE</td>
<td>every other sem.</td>
<td>1</td>
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<td>overload</td>
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<td></td>
<td></td>
<td>other</td>
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<td>2</td>
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<td>1</td>
<td>Yes</td>
<td>1</td>
<td>every other sem.</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
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<td>Yes</td>
<td>1</td>
<td>3 to 6</td>
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</tr>
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<td>6</td>
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<td>1</td>
<td>Yes</td>
<td>1</td>
<td>every spring</td>
<td>1</td>
</tr>
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<td>7</td>
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<td>Yes</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>Yes</td>
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<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>Yes</td>
<td>1</td>
<td>Yes</td>
<td>1</td>
<td>1 to 2</td>
<td>1</td>
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<td>10</td>
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<td>1</td>
<td>Yes</td>
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<td>every 5 to 6 yrs.</td>
<td>1</td>
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<td>11</td>
<td>Yes</td>
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<td>Yes</td>
<td>1</td>
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### Case #2

**Compensation lowered from 2,500/sem. to 2,000 to 1,500. HIT due to performance, with 20 yrs of excellent evaluations, but to bring salary for PT teaching "in line."**

Owens pays over $5,000 for same course for F/T Instructor and it would be over $3,000 if I had taught P/T at Owens for as many years as I have at DCSU.

11. I conduct training for various personnel in a variety of areas.

12. Teaching is connected to the administrative work - always been part of the job - but it makes for a 52 hour week! It's unusual.

13. I receive great reviews from my student and the faculty in the department think I'm doing a great job. So why does the current system keep me from earning more dollars for doing great job? I can make more money doing something else and probably will if the department does not pay me more for the services rendered.

14. My duties are varied. I will prepare/set up labs, teach in the labs, manage the Med. Tech. lab as well as visit training sites (hosp.) for our students in the clinical phase of their studies.

15. This is based on how it would have been, had my section of UI/TV 100 filled up.

16. My teaching contract identifies me as an Associate Professor. If I teach between 2 am & 5 pm, I take vacation which I thought was a University requirement.

17. I'm just asked to talk to various groups, classes, or staff - on an ad hoc basis, on a health topic.

18. Guest lecture at other classes or occasionally do seminars, etc.

19. Adjunct faculty

20. When Admin teach credit classes should be std. basis - across the board.

21. I taught for the History Dept. on an overload rate for several years. Finally with the support of my supervisors and the Chair to the Hist. Dept., the overload was made part of my contract (5% is paid via the History Dept.)

22. My teaching compensation is included in my annual contract (5%)

23. I am very reluctant to ever teach UI/TV 100 again. That is unfortunate because it was a GREAT enjoyment and I received very positive student feedback. However, those intrinsic regards are not enough motivation to take on this task when my regular duties demand so much attention. If I was compensated to teach it, I would gladly arrange my work schedule to accommodate 40 hrs. on my "regular" job, plus the extra hrs. of teaching, grading, etc. I feel strongly that anyone who teaches a course ought to be compensated for it (in the form of money).
Survey on Administrative Staff Teaching Compensation

### Comments

**Case #35**
The first 4 years of my teaching were at a p-t rate. This changed last fall due to a directive from Norma Stuckler. The first 4 years of my teaching was (contract-wise) on a faculty contract. As it is now configured as an overload, I would assume that is not faculty rank. As I teach "studio" or applied lessons, I am paid only at 60% of the overload rate despite the fact I put in the comparable hours to teaching courses demanding the same time.

**Case #36**
Enjoyable to teach. Places me and the students I normally work with in a difficult context. It would be nice to paid a little more than adjunct level. $1,500 for a class.

**Case #110**
Not a credit class - "lighting design", 3 week workshop course - created by instructor - 4-5 students may take it for non-credit experience; doesn't fit into curriculum outlined by college.

**Case #124**
Creative Arts Program, not a class for credit.

**Case #125**
I am compensated in the amount of $1,650/class each semester. I normally teach over the lunch hour.

**Case #130**
Preparation of materials requires overtime. Teach CUPS training, software application. Probably is irrelevant but filled out the survey regardless. Main reason to reply is my belief that all training should be the responsibility of UCS since they do all other staff application training, e.g. ACCESS, Word, EXCEL.

**Case #131**
UCS pays at the rate of $50/seminar hour; however, I must take vacation time if during normal work hours.

**Case #132**
Any teaching during working hours should not be compensated for unless explicit additional work time is performed. Earned approx. $1,200 9-10 years ago.

**Case #133**
Will be compensated; do not know under what terms. Faculty rank to be determined. Happy to discuss survey responses if necessary.

**Case #135**
Adjunct faculty appt.

**Case #136**
I am not compensated for classes taught for the Math Dept. ACE 1040/0.5 part of administrative contract. If I do a MATH 102 that has evening common exams I work after hours; other hours are during work hours.

**Case #139**
Personnel teaching for a department (if they are not part of that dept. and do not have faculty rank) should be compensated by that dept. and receive adjunct faculty rank.

**Case #140**
Compensated at P/T fac. rate for summer; part of admin. contract for F & S. Any administrative staff member who teaches consistently semester after semester should have the faculty rank of lecturer or adjunct.

**Case #150**
I teach because faculty don't want to teach a low enrollment summer class for only a fraction of the pay. It's extra $ for me so I don't care.

**Case #155**
If an overload class is needed, I will teach at the overload rate in addition to my regular 40 hr. work schedule.

**Case #157**
My compensation situation is individualized and does not fit the aforementioned.
June 30, 1998

Memorandum

To: Becca Ferguson
Assistant Provost

From: Pat Green, Chair
ASC Personnel Welfare Committee

PWC met yesterday with members of HP present to discuss how to proceed with the progression study and placement in the pay ranges of administrative staff. Before progression through the ranges can be adequately addressed, PWC feels that administrative staff who has been here should be appropriately placed in the ranges. Compensation plans such as ours recommend that employees should have mechanisms to reach the midpoint of a range anywhere from 7-9 years. Therefore we have been compiling data, with the help of Human Resources, to determine how much it would cost to place employees correctly in the ranges so all staff are on a level playing field to move forward. In an interesting twist, the nature of this project has taken on significant proportions due to the Board of Trustees voting to move to 100% merit beginning next year. Rather than stagger our recommendation over three years, the committee will recommend that all the adjustments be made next year before we move to full merit. We determined that after we move to full merit there would be no way to evaluate a staff member's proper placement in the range.

Concurrent with this study we have identified the following issues, again as a result of the movement to full merit, that must be addressed simultaneously with the placement issue and becomes part of a proposal:

1. Progression to the midpoint in 7-9 years based on merit
2. Definition of merit and criteria
3. Inconsistencies of current merit document
4. Merit tied to performance evaluation/goal setting
5. Movement of the pay range
6. Current handbook policies - i.e. new hires in January forward not entitled to any merit
7. Goal setting cycle - i.e. staff goals set in May, University goals announced at Opening Day
8. Evaluation of performance evaluation instrument

PWC will work on this very aggressive agenda this year in order to get a proposal to the administration and Board of Trustees for implementation prior to full merit. This probably means we will have to have something Board approved in February or March prior to next year's performance evaluation.

Once again, we look forward to working with HP on these issues in a collaborative fashion. Donna Wittwer has agreed to gather some benchmark information from other colleges and universities and have it for a meeting on August 12.

I will be happy to answer any questions.

PG:af

Cc: Deb Boyce
Pat Patton
Donna Wittwer
Karen Woods
PWC Members
June 3, 1998

Memorandum

To: Duane Whitmire

From: Pat Green, Chair
ASC Personnel Welfare Committee

RE: 1997-98 Final Report

This year has been extremely busy and productive for the Personnel Welfare Committee. While there were many issues for PWC to consider, we decided to concentrate on issues related to the compensation plan, developing a new complaint process for non-compensation issues, and taking a first look at the issues of placement and progression through the pay ranges. We began to examine the merit early on, but decided until other compensation issues were taken care of and the new performance evaluation tool had completed a one-year cycle, it would not be productive.

We killed a lot of trees, but we really accomplished a first for all of administrative staff. An entirely new section of the ASC Handbook was created to address policy and procedures for the compensation plan, the re-evaluation process, and resolve differences more positively. In addition, a new policy for addressing non-compensation issues was written. After nine months of hard work, these have been forwarded to the Board of Trustees for approval at the June meeting. The nine months represent collaboration between PWC, Human Resources and the administration -- a first ever. Therefore, the documents that have gone forward are ones that have been agreed upon by all groups. In the past as you are aware, handbook changes were written by PWC, approved by ASC and forwarded to the administration. Frequently, the document that was sent forward for Board approval was very different from the one approved by ASC. This time with some minor editorial corrections for clarity and no substantive change in meaning from the administration, the documents truly represent the combined efforts of the groups. The documents forwarded to the Board will serve all staff well, operationalize the compensation plan, and create a more effective and collaborative way to handle non-compensation complaints.

In the memo of transmittal from the Provost's office to President Fibeau, Acting Provost Steve Richardson said, "These two documents are products of a very fruitful collaboration among representatives of Administrative Staff Council and University administration. Their implementation will clarify and extend existing policies and will be an important step in our continuing efforts to enhance the campus climate."

PWC has also begun work on placement and progression issues. Since implementation of the compensation plan, new staff are being hired at competitive salaries. It is clear, however, that some staff who have been here for a number of years have not been adequately compensated. Therefore, PWC is planning to put forth a proposal to remedy this, as well as help define the criteria for progression through the pay ranges to the midpoint. We will be working in conjunction with Human Resources. The current PWC has agreed to work this summer so we will not lose momentum. The members of the committee have also agreed to serve next year for continuity.

The suggested birth/adoption and fee waiver policy changes are not being sent forward to the Board this year. Next year Duane Whitmire is going to evaluate the leave and other policies that involve all constituent groups in an effort to clarify the policies and achieve some consistency.

While this has been a productive year, it is another beginning. Next year's goals should include the following:

- Continue the positive collaboration with Human Resources and the administration
- Work with Human Resources to develop training for all staff on the new policies
- Focus primarily on the development of the placement/progression plan to present to the Board of Trustees next year for implementation in the 1999-2000 salary year
- Follow up on the handbook changes that were not submitted for Board approval this year
I also recommend that the Executive Committee:

- Establish an ad hoc committee to examine the issues of merit. The current document is contradictory and apparently quite different from what ASC passed. This is an issue of such magnitude that it should be the focus of a group and overlap with the evaluation of the performance evaluation tool. Further, this should be done in collaboration with Human Resources.
- Identify immediately staff members who will be the first fifteen members of the Administrative Staff Advisory Team in the re-evaluation process. These staff members will have to be trained as soon as possible.
- Establish an ad hoc committee to work with Human Resources to revise and reorganize the entire handbook.

I would be greatly remiss if I did not acknowledge the time and effort by the members of the committee. They have been great! I want to thank: Paul Lopez, Ana Betts, Joyce Keple, Sharon Hanna, Sandy Lagro, and Inge Eflopping. I also want to thank Patti Anhney for all her work on the progression data and agreeing to be on PWC right now. The committee is a great cross section of the university. I also can not thank Becca Ferguson, Donna Wittwer and Pat Patton enough for going above and beyond in collaborating with us and advocating for administrative staff.

In conclusion, if there were an award for a committee who portrayed the motto for the year—Action and Success through Collaboration—PWC would win hands down!

PG:aaaf

cc: Deb Boyce
    Rebecca Ferguson
Memorandum

To: Rebecca Ferguson, Assistant Provost
    Human Resources

From: Dr. Duane Whitmire, Chair
      Administrative Staff Council

Re: Amendments for Inclusion in the Administrative Staff Handbook

May 29, 1998

Due to the work of the Amendments and Bylaws Committee, I am pleased to submit three proposals to amend the ASC Bylaws and Charter which were approved during 1997-98. In addition, please find seven proposals which were approved since the most recent revision of the Handbook, but prior to this year. Beverly Stearns who served as Chair of the Amendments and Bylaws Committee along with John Hartung, Matt Webb, and Mary Beth Zachary are to be commended for their efforts on behalf of all administrative staff.

Three Proposals to Amend the ASC Bylaws and Charter
Approved during 1997-98

1. Proposal to amend Bylaws Article 10 (approved by ASC 3/5/98)
2. Proposal to amend Sections III and IV of the Charter (approved 4/2/98)
3. Proposal to amend Bylaws Article 4, Section 1.A. and 1.B. and Section 4.a. and 4.b. (approved 4/2/98)

Seven Proposals Approved Since the Most Recent Revision of the Handbook, but Prior to this Year

1. Proposal to amend Article 1, Sections 1, 5, and 6 (approved 1/4/96)
2. Proposal to amend Article 2, Section 2.I. and 2.J. (approved 1/4/96)
3. Proposal to amend Article 8, Section 1 (approved 1/4/96)
4. Proposal to amend Bylaws Article 2, Section 2 (approved 5/1/97)
5. Proposal to amend Bylaws Article 4, Section 5 (approved 5/1/97)
6. Proposal to amend Bylaws Article 2, Section 2.G. (approved 5/1/97)
7. Proposal to amend the Bylaws to replace the word “volunteer” with the word “self-nominate” and to change the name of Article 4 from ELECTIONS to “THE
ELECTION/APPOINTMENT PROCESS (approved 5/1/97)

In accordance with Article 10, I am forwarding all approved amendments in writing (see enclosures) to the Office of Human Resources for inclusion in the next revision of the Administrative Staff Handbook.

If you need any additional information, please feel free to contact me.

pc: /Deborah Boyce, Chair-Elect
    Judy Donald, Secretary
    Beverly Stearns, Chair of Amendments and Bylaws
June 10, 1998

MEMORANDUM

TO: Pat Green
Chair, ASC Personnel Welfare Committee

FROM: Charles R. Middleton
Provost and Vice President

SUBJECT: Administrative Staff Handbook Recommendations

I have now had an opportunity since my return to Bowling Green to review the work of the ASC Personnel Welfare Committee on the new Administrative Staff Handbook recommendations which you submitted to me on 11 May 1998. I find them to be excellent. I am also pleased that they are a reflection of the collaborative effort of so many individuals in producing a first-rate outcome. I look forward to discussing them with the Board at their meeting next week and to their implementation thereafter. Thank you personally for all of your hard work in leading this discussion and assuring that it came to a successful conclusion. Best regards for a happy summer.

ssm

xc: Debra Boyce
Judy Donald
Becca Ferguson
Sandra MacNevin
Duane Whitmire
Memorandum

To: Sandra MacNevin  
   Executive Assistant to the President

   Deborah Magrum  
   Secretary to the Board of Trustees

From: Dr. Duane Whitmire  
   Chair of Administrative Staff Council

Re: New Administrative Staff Council Officers - 1998-99

June 1, 1998

Please be advised that on July 1, 1998, the following individuals will assume the various officer positions associated with Administrative Staff Council.

Deborah Boyce from University Advancement - Chair

Paul Lopez from WBGU-TV - Chair-Elect

Joyce Blinn from Academic Enhancement - Secretary

It has been a pleasure to serve as Chair of Administrative Staff Council this past year. If you need any additional information, please feel free to contact me.

pc:  J. Blinn

   / D. Boyce
   J. Donald
   R. Ferguson
   P. Lopez
   C. Middleton
   S. Ribeau
Administrative Staff Compensation Plan

INTRODUCTION AND RATIONALE
In order for Bowling Green State University (BGSU) to attract and retain qualified administrative staff employees, it is BGSU's policy to maintain fair and competitive grade levels and pay ranges without regard to race, sex, color, national origin, religion, ancestry, age, marital status, disability, or status as special disabled or Vietnam-Era veteran.

The purpose of the Administrative Staff Compensation Plan is to establish a system that reflects

- Relationships between positions and their worth
- The principles of equitable compensation
- Competition with the external employment market

SCOPE
These policies and procedures apply to all covered administrative staff positions and supersede all previous written or unwritten practices. The ongoing responsibility for the administration of the Administrative Staff Compensation Plan (Plan) is assigned to the Assistant Provost for Human Resources.

I. Objectives
   It is the intent of the Administrative Staff Compensation Plan to
   - Administer the Plan in accordance with the general policies of the University
   - Provide a compensation plan that is internally equitable and externally competitive with the market
   - Ensure equitable compensation for positions requiring similar educational levels, experience levels, skills, effort, working conditions, and levels of responsibilities
   - Ensure that the administration of the position evaluations and grade level assignments is consistent and uniform throughout the University
   - Provide for a review process that will address inequities
   - Allow for the maintenance of competitive grade levels
   - Provide policies and procedures which ensure that the Plan will be equitably and efficiently administered

II. Definition of Terms
   The following terms are used in the Administrative Staff Compensation Plan:

A. Administrative Compensation Working Group
   The Administrative Compensation Working Group is comprised of all the Vice-Presidents and the President's designee. General Counsel will serve in a non-voting status. This group routinely reviews issues regarding the Plan and decides the outcome of the appeals process.

B. Administrative Staff Advisory Team Members
   The Administrative Staff (AS) Advisory Team is comprised of 15 administrative staff members selected by the Administrative Staff Council (ASC) Executive Committee. Team members will serve three-year terms. The Team collaborates with Human Resources in the re-evaluation of Position Analysis Questionnaires. The Team is trained by Human Resources, past administrative staff members of the Appeals Committee, and past members of the Administrative Staff Advisory Team to analyze, evaluate, and recommend a
grade level (numeric ranking) for a position within the Plan. Each time an administrative staff position is re-evaluated, Human Resources selects two members from the Team to participate in the process. These members represent two vice-presidential areas different from the vice-presidential area of the position being re-evaluated. Members of the Team also participate in the Conciliation/Appeals process. Team members who participate in the re-evaluation of a position are not eligible to serve on any Appeals Board for that position.

C. Grade Level
The grade level is the numeric ranking of administrative staff positions from 5 to 23.

D. Human Resources/Administrative Staff Advisory Team (HR/AS ADVISORY TEAM)
Two members of the Human Resources staff and the two members selected from the Administrative Staff Advisory Team comprise the HR/AS Advisory Team. This combined team is responsible for analyzing, evaluating, and recommending a grade level whenever an administrative staff position is re-evaluated.

E. Pay Range
The pay range is the compensation for a particular grade level. Each pay range has a designated minimum, midpoint and maximum. In 1997/98, for example, in grade level 14 the minimum is $30,940, the midpoint is $39,449, and the maximum is $47,957.

F. Position Analysis Questionnaire
The Position Analysis Questionnaire is the instrument used to describe the position responsibilities. This questionnaire is used by the HR/AS Advisory Team and/or Human Resources to determine the grade level of an administrative staff position based upon the level of knowledge and experience, creativity and complexity, impact on the institutional mission, internal and external contacts, and leadership. The Position Analysis Questionnaire must be completed in order for any administrative staff position to be created and/or changed.

III. Policies
The following policies have been established for the maintenance and management of the Administrative Staff Compensation Plan.

A. New Administrative Staff Hire
New administrative staff generally are hired between the minimum and midpoint of a grade level. A salary assigned above the midpoint requires prior approval by the Vice-President, after consultation with the Offices of Human Resources and Affirmative Action. (Number 2 - Approved by Board of Trustees, September 13, 1996.)

B. Upgrade
Definition:
A position is re-evaluated and assigned to a higher grade level as a result of significant expansion in the position's existing duties and responsibilities.

Policy:
The incumbent is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Number 3 - Approved by Board of Trustees, September 13, 1996.)

C. Promotion
Definition:
An incumbent moves from a position requiring a certain level of skill, effort, and responsibility to a position in a higher grade level requiring a significantly greater degree of skill, effort, and responsibility.

Policy:
When an employee is promoted, she/he is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Point 4 - Approved by Board of Trustees, September 13, 1996.)
D. Interim/Acting Positions
Definition:
A staff member is assigned to a position in a higher grade level on an interim/temporary/acting basis.

Policy:
If the assignment is longer than 30 calendar days AND IS IN A HIGHER GRADE LEVEL, the staff member receives a premium for the time served equal to at least a 5% increase in salary or the minimum for the interim grade level, whichever is greater. (Point 5 - Approved by Board of Trustees, September 13, 1996.)

E. Demotion
Definition:
An incumbent staff member moves from a position requiring a certain level of skill, effort, and responsibility to another position in a lower grade level requiring a lesser degree of skill, effort, and responsibility.

Policy:
When a demotion occurs, the incumbent's salary is reduced to a level in the lower pay range equivalent to his/her level in the original pay range. (Point 6 - Approved by Board of Trustees, September 13, 1996) The President in consultation with the Vice-President and Human Resources must approve any exceptions to this policy.

F. Downgrade
Definition:
A position is reassigned to a lower grade level as a result of significant reduction in the position's existing duties and responsibilities.

Policy:
When a position downgrade occurs, the incumbent's salary is reduced to the level in the lower pay range equivalent to his/her level in the original pay range. The President in consultation with the Vice-President and Human Resources must approve any exceptions to this policy.

G. Transfer
Definition:
An incumbent staff member moves from a position requiring a certain level of skill, effort and responsibility to another position requiring the same degree of skill, effort, and responsibility which is assigned to the same grade level.

Policy:
When a transfer occurs, normally the incumbent's salary will not be adjusted. (Point 7 - Approved by Board of Trustees, September 13, 1996) The President in consultation with the Vice-President and Human Resources must approve any exceptions to this policy.

H. Market Exceptions
Definition:
A market exception is a special SALARY premium established for particular positions when unusual market conditions exist causing excessive turnover, salary midpoints well below market average, and/or failure of current salary to attract qualified candidates.

Policy:
A special market SALARY premium may be established PAID for these positions. (Point 8 - Approved by Board of Trustees, September 13, 1996.)

I. Pay Above Maximum
Policy:
Administrative staff salaries are capped at the maximum or above the maximum of a pay range. However, staff whose salaries are currently at or above the maximum are exempt for a period of three years. Effective July 2000, the salaries of any staff still above maximum will be frozen until such time as those salaries are within his/her range. If, at any time during the three years, a staff member's salary should
fall within range, the exemption ceases to apply to that staff member and the capped maximum will be enforced. (Point 10 - Approved by Board of Trustees, September 13, 1996.)

Staff who are at the maximum will be considered for a merit increase not to exceed the percentage adjustment of the pay range.

Staff above the maximum are eligible each year for a one-time, merit-based bonus not to exceed the percentage of the salary pool designated for merit each year. This will occur only when the Board of Trustees authorizes bonuses and will not be added to base salaries.

J. Progression Through the Pay Range
Definition:
Progression through a pay range is the method by which an incumbent moves through his/her assigned pay range.

Policy:
Staff progress through pay ranges based on meritorious performance. Human Resources, in conjunction with the Administrative Staff Council Executive Committee, will develop by the year 2000 criteria and a process for staff to reach the midpoint of a pay range.

K. Title Revision
Policy:
Title changes may be requested to more accurately reflect position responsibilities. A Position Analysis Questionnaire is completed and forwarded to Human Resources in accordance with established procedures. If the proposed title accurately reflects the responsibilities, the HP/AS Advisory Team may recommend that the title be changed regardless of any change in the grade level. No title change occurs without approval from the supervisor, Vice-President and Human Resources.

L. Salary Range Adjustments
Policy:
Effective 1997-98, the ranges for each grade level will be adjusted in a three-year recurring cycle. In the first two years of the cycle, the pay range of each grade level will move up annually by an amount that is 1% less than the average salary increase paid to staff that year. (Number 9 - Approved by Board of Trustees, September 13, 1996.)

Every third year beginning with 1999-2000, the University will re-evaluate the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in accordance with that re-evaluation. (Point 9 - Approved by Board of Trustees, September 13, 1996.)

IV. Administrative Compensation Plan Position Evaluation/Re-evaluation Processes
The position evaluation process is the method by which positions are evaluated against a uniform set of criteria and assigned to established grade levels and appropriate pay ranges. Human Resources conducts the evaluations for new positions. Human Resources, in consultation with the Administrative Staff Advisory Team, conducts the re-evaluation of existing positions. It is anticipated positions will be re-evaluated no more than once every two years. Position evaluations/re-evaluations are normally completed in twelve (12) weeks unless there is an agreement to extend the timelines.

A. Positions are evaluated when one of the following occurs:

- A new position is created. A supervisor, area head, dean, Vice-President, or President/Designee, in consultation with Human Resources, is responsible for submitting a completed Position Analysis Questionnaire to Human Resources.

- A position becomes vacant. A supervisor, area head, dean, Vice-President, or President/Designee in consultation with Human Resources is responsible for submitting a completed Position Analysis Questionnaire to Human Resources.
B. Positions are re-evaluated when one of the following occurs:

- A significant change in responsibilities occurs or is proposed in existing positions. Re-evaluations are initiated by the incumbent or the supervisor submitting a completed Position Analysis Questionnaire to Human Resources.

- Reorganization occurs. Re-evaluations are initiated by an area head, dean, Vice-President, or President/Designee prior to the reorganization and in consultation with Human Resources. Reorganization may result in significant changes in position responsibilities.

Re-evaluation Process for Administrative Staff Positions:

1. The initiator (staff member, supervisor, area head, Vice-President, or President/Designee) of the review notifies Human Resources, in writing, that a position needs to be re-evaluated. Human Resources sends a Position Analysis Questionnaire and Guidelines for Position Evaluation either through campus mail or electronic format.

2. The initiator (staff member, supervisor, area head, Vice-President, or President/Designee) of the review completes the Questionnaire. If the initiator is the employee, the completed Questionnaire is forwarded to both the immediate supervisor and the second level supervisor for signature and comment. When an initiator is a supervisor, area head, or Vice-President, the supervisor meets with the incumbent to discuss position responsibilities and obtain signatures on the Questionnaire. The supervisor comments, signs, and forwards the Questionnaire to the second level supervisor. Supervisor and employee retain a copy.

3. Upon receipt of the Questionnaire, the second level supervisor evaluates, comments, signs, and forwards to Human Resources.

4. Upon receipt of the completed Position Analysis Questionnaire, Human Resources logs in and begins a tracking/timeline. Human Resources reviews all documents for completeness, gathers additional information, as needed, and distributes the documents to the HR/AS Advisory Team.

5. The HR/AS Advisory Team analyzes, evaluates, and recommends a grade level based on the established criteria. In the event the HR/AS Advisory Team requests additional information, Human Resources gathers the additional information and forwards to the Team.

6. Human Resources forwards the results of the re-evaluation to the appropriate Vice-President for consideration. If the position reports directly to the President, it will be forwarded to the President/Designee for consideration.

7. The Vice-President or President/Designee reviews all documents and forwards a written decision about the position to Human Resources.

8. Following the Vice-Presidential or Presidential/Designee decision, Human Resources forwards copies of the re-evaluation results and the factor sheet to the employee and the appropriate supervisory structure. Additional information can be requested from Human Resources.

9. Administrative staff and/or initiators who do not agree with the determination meet with Human Resources and if appropriate, the immediate supervisor to attempt resolution. If there is no agreement, the staff member and/or initiator may follow the Conciliation/Appeals process.

V. Conciliation/Appeals Process

The purpose of the Conciliation/Appeals Process is to ensure prompt resolution of disagreements regarding the results of position re-evaluations and subsequent placement in the Plan.
There are three steps in the process:
1. Conciliation Meeting
2. Appeals Board
3. Presidential Appeal

A. Conciliation Meeting

The Conciliation Meeting, facilitated by the Assistant Provost for Human Resources/designee, provides the initiator of the conciliation process and the Vice-President with an opportunity to resolve the complaint in a collaborative, informal fashion. If the position reports directly to the President, the President/Designee will participate in the conciliation process. Participants in the meeting include:

- Employee
- Immediate Supervisor
- Vice-President or President/Designee
- ASC Review Team member from the initial re-evaluation team
- Assistant Provost for Human Resources/designee

The process is normally completed within four (4) weeks unless there is a decision to extend the timelines.

Process:
1. Within seven (7) calendar days after meeting with the immediate supervisor and Human Resources, the initiator informs Human Resources of the intent to enter into conciliation.
2. Upon receipt of the request for conciliation, Human Resources begins a tracking/timeline.
3. Within fourteen (14) calendar days of the request for conciliation, Human Resources schedules the meeting.
4. Within fourteen (14) calendar days after the meeting is scheduled, the meeting will take place to attempt resolution.
5. Human Resources is responsible for reporting, in writing, the outcome of the meeting to all involved within fourteen (14) calendar days.
6. If the meeting results in a change of grade level for the position in question, Human Resources negotiates the effective date of the change with the Vice-President. No action is necessary if the meeting results in no change in the position.
7. If the initiator is not satisfied with the decision, she or he can request an Appeals Board.

B. Appeals Board

The Appeals Board provides the initiator of the appeals process an opportunity to achieve resolution through the involvement of administrative staff in reviewing the appeal and making recommendations to the Administrative Compensation Working Group. The Appeals Board consists of five (5) members of the Administrative Staff Advisory Team who have not been involved in the re-evaluation or conciliation process. The process is normally completed within twelve (12) weeks unless there is a decision to extend the timeline.

Process:
1. Within seven (7) calendar days of conciliation, the initiator informs Human Resources and the Vice-President, in writing, of the intent to appeal. If the position reports directly to the President, the initiator informs Human Resources and the President/Designee, in writing, of intent to appeal.
2. Within seven (7) calendar days of notification of the intent to appeal, Human Resources forwards the appeals packet to the initiator.
3. Within fourteen (14) calendar days of receiving the appeals packet, the initiator completes the required documentation for the appeals and forwards to Human Resources.

4. Upon receipt of the completed documentation, Human Resources forwards a copy of the initiator’s completed appeals packet and any other documentation to the Vice-President or President/Designee. Within fourteen (14) calendar days of receiving the information from Human Resources, the Vice-President or President/Designee responds in writing to Human Resources. Human Resources forwards a copy of the response to the initiator.

5. During steps three and four, Human Resources selects five (5) Administrative Staff Advisory Team members for the Appeals Board. Advisory Team members who participated in the re-evaluation or conciliation process are not eligible to serve on the Appeals Board.

6. Upon receipt of the completed documentation, Human Resources begins a tracking/timeline.

7. Within seven (7) calendar days of receiving the completed documentation from the initiator and the Vice-President or President/Designee, Human Resources forwards the documentation to the Appeals Board.

8. Within fourteen (14) calendar days of receipt of the completed documentation, the Appeals Board meets and reviews the issue.

9. Within seven (7) calendar days of the review, the Appeals Board submits its recommendation in writing to Human Resources, initiator, Vice-President or President/Designee and Administrative Compensation Working Group.

10. Within thirty (30) calendar days of receiving the recommendation of the Appeals Board, the Administrative Compensation Working Group, without the Vice-President or President/Designee where the appeal occurs, reviews the recommendation of the Appeals Board and makes a decision.

11. Within seven (7) calendar days of making a decision, the Administrative Compensation Working Group will submit the decision in writing to the initiator, supervisor, Vice-President or President/Designee, and Human Resources.

12. If the decision results in a change of grade level, Human Resources negotiates the effective date of the change with the Vice-President or President/Designee.

13. If the initiator or Vice-President or President/Designee is not satisfied with the decision, she/he can appeal to the President.

C. Presidential Appeal

1. Within seven (7) calendar days of receiving the decision of the Administrative Compensation Working Group, the appeals in writing to the President or his/her designee of the University. If the position reports directly to the President, the President appoints a designee for this process.

2. Within thirty (30) calendar days after receiving the appeal, the President or designee responds in writing to the initiator, supervisor, Vice-President, Administrative Compensation Working Group, and Human Resources.

3. The decision of the President or designee is final.

Approved by Administrative Staff Council May 7, 1998
Conciliation Process for Non-Compensation Complaints  
(Replaces pages 30-34 in current handbook)

Purpose
The purpose of the Conciliation Process is to ensure the prompt resolution of complaints by administrative staff members regarding the terms and conditions of employment, or other job-related concerns that have not been resolved with the immediate supervisor. A staff member may pursue this process for any or all of the following:

- Failure to follow policies and provisions enunciated in the Administrative Staff Handbook
- Inadequate or inequitable consideration of professional competence
- Termination of appointment for cause

Non-renewal of contract for an administrative staff member of three or more years must be reviewed by the appropriate Vice-President. The decision not to continue the contract of an administrative staff member is not grievable and, therefore, not subject to this procedure.

Any complaint related to the Administrative Staff Compensation Plan will be handled through the procedures established for compensation issues.

Scope
These procedures apply to all covered administrative staff positions and supersede all previous written or unwritten practices. The ongoing responsibility for the administration of these procedures is assigned to the Assistant Provost for Human Resources. Prior to entering into conciliation, the staff member with the complaint meets with Human Resources in an attempt to resolve the complaint. Human Resources investigates the complaint. If there is no resolution, the staff member may request conciliation.

There are two steps in the process:
1. Conciliation Meeting
2. Presidential Appeal

I. Conciliation Meeting

The Conciliation Meeting, facilitated by the Assistant Provost for Human Resources/designee, provides the staff member and the Vice-President or President/Designee with an opportunity to resolve the complaint in a collaborative, informal fashion. Participants in the meeting include:

- Employee
- Immediate Supervisor
- Vice-President or President/Designee
- Assistant Provost for Human Resources/designee

The process is normally completed within four (4) weeks unless there is a decision to extend the timelines.

Process:
1. The staff member will inform Human Resources and the immediate supervisor in writing that she/he requests to enter into conciliation.

2. Upon receipt of the request to enter conciliation, Human Resources begins a tracking/timeline.

3. Within fourteen (14) calendar days of receiving the request to enter conciliation, Human Resources forwards the documentation to all involved and schedules the meeting.
4. Within fourteen (14) calendar days after the meeting is scheduled, the meeting will take place to attempt resolution.

5. Human Resources is responsible for reporting, in writing, the outcome of the meeting to all involved within fourteen (14) calendar days.

6. If no resolution is reached, and the staff member is not satisfied with the decision, she/ he can appeal directly to the President.

II. Presidential Appeal

1. Within seven (7) calendar days of receiving the decision, the staff member appeals, in writing, to the President of the University. If the staff member filing the complaint reports directly to the President, the President appoints a designee for this process.

2. Within thirty (30) calendar days after receiving the appeal, the President or designee responds, in writing, to the staff member, supervisor, Vice-President, and Human Resources.

3. The decision of the President or designee is final.

Approved by Administrative Staff Council on May 7, 1998
Memorandum

To: Dr. Charles R. Middleton, Provost and Vice President for Academic Affairs

From: Dr. Duane E. Whitmire, Chair
      Administrative Staff Council

Re: University Ombuds Office Resolution

June 5, 1998

Below please find the University Ombuds Office Resolution as passed in its amended form by the Administrative Staff Council at the June 4, 1998 meeting.

Administrative Staff Council
Bowling Green State University
University Ombuds Office Resolution (as amended)

WHEREAS, there have been growing concerns with respect to conflict situations on campus, including but not limited to racial, sexual, and sexual orientation harassment as well as verbal and physical assaults; and

WHEREAS, Administrative Staff Council is committed to working proactively for the welfare of all members of the University community; and

WHEREAS, currently the University offers no formal, centralized training program in conflict resolution and no central office exists to help those who experience conflict situations; and

WHEREAS, an Ombuds office is one means of effectively dealing with conflict situations; and

WHEREAS, additional training to assist all members of the University to recognize the importance of respecting one another's personal well-being is another means to effectively deal with conflict situations;

THEREFORE, BE IT RESOLVED, that the Administrative Staff Council recommends that BGSU establish an independent Ombuds office to handle student, staff, and faculty concerns along with establishing additional training programs.

If you have any questions about this resolution, please feel free to contact any member of the ASC Leadership Team.

pc: / Deborah Boyce, Chair Elect of Administrative Staff Council
    Judy Donald, Secretary of Administrative Staff Council
    Sandra MacNevin, Executive Assistant to the President
    Deborah Magrum, Secretary to the Board of Trustees
    Sidney Ribeau, President
Creating a Culture of Leadership
at
Bowling Green State University

Presentation on leadership
by
University President
Sidney A. Ribeau

April 29, 1998
Meeting of the "Legions"
(The President's Cross-Divisional Leadership Team)
Bowling Green State University
Bowling Green, Ohio
President's Presentation on Leadership at BGSU

Introduction

The following question was posed at the March 1998 meeting of the “Legions” (President’s Cross-Divisional Leadership Team) during a discussion of leadership at BGSU:

“Do we have a professed leadership style at Bowling Green State University?”

In response to this question, University President Sidney A. Ribeau offered a brief presentation on his leadership expectations to the “Legions” group during the April 29, 1998, meeting.

Six Key Leadership Elements: Statement of President Ribeau’s Leadership Expectations for Managers and Supervisors at Bowling Green State University - April, 1998

While recognizing that leadership will vary according to each person’s distinct leadership style, nonetheless University President Sidney A. Ribeau identified six key elements of leadership which should define the practice of leadership at BGSU. The following is an outline of these six key leadership elements:

1. Leaders must endorse the University’s mission, vision and core values

Bowling Green State University aspires to be the premier learning community in Ohio and one of the best in the nation.

- each leader must understand the mission, vision and core values of the University
- each leader must know what the mission, vision and core values mean to him or her
- each leader must “own the vision”
- each leader must operationalize the vision in his or her area
- each leader is responsible for the implementation of the University’s mission, vision and core values in his or her area

“Own the vision. Breathe life into it for your area.”
Each leader must recognize that our vision for the University is supported by identifiable values.

The five core values established by the University community are respect for one another, cooperation, intellectual and spiritual growth, creative imaginings, and pride in a job well done.

- Each leader must "live the vision" and "live the core values" of the institution.
- Our institutional values should be personified through our leaders' actions.

"It is each leader's responsibility to model our vision and values, these are not just words."

- Our core values are intended to serve as guidelines during the institutional processes of renewal and transformation as well as in our day-to-day affairs.
- The core values of respect for the legitimate interests of others and cooperation in attaining common goals are critical to the change process at Bowling Green State University.

2. Leaders must motivate others to implement the vision and core values

- Each leader should assist his or her employees in understanding how the unit's goals fit into the overall mission and vision of the University.
- Each leader must motivate implementation of the University's mission, vision and core values.
- Each leader is a "cheerleader" who values and encourages the people who work with him or her.

"A leader should find out what motivates his or her employees and, when in doubt, ask them."

- Each leader is charged with moving his or her people toward the achievement of the University's goals.
- Each leader is responsible for his or her own performance and for that of others in his/her area.
- Each leader must recognize and reward performance.
3. **Leaders must analyze and solve problems**

- Each leader must take the initiative in solving problems, but first he or she must "own the problem".
- Each leader must model leadership, never going to your own supervisor without a proposed solution.
- Each leader must correct situations that need correcting.

"A leader should take the approach: "if it is your problem, it is my problem’ and work toward finding the best course of action."

- Each leader must be creative, think "out-of-the-box" if necessary; for example, it is not enough to say "I don’t have the resources".
- Each leader must develop a plan and identify the steps to make it happen.
- Each leader must persevere, don’t give up, energize others to find solutions.

4. **Leaders must engage in participatory management**

- Each leader must involve all employees in decision-making through a participatory process.
- Each leader must make a commitment to learn the participatory process and to teach others.

"A leader is responsible for creating an environment that encourages participation."

- Each leader must engage all employees in change management at BGSU.
- Each leader must explain the "big picture" to his or her employees; that is, the overall mission and vision of the University and why we are heading in this particular direction.

"A good leader brings people into the process."

- Each leader must not only seek ideas, but use them.
- Each leader is responsible to explain what happens and why to his or her employees.
5. **Leaders must correct performance problems**

- each leader is responsible for his or her performance and for the performance of employees in his/her area
- each leader should strive to correct performance problems in a developmental manner whenever possible, rather than in a punitive way
- each leader must do more than just give directives, he or she must interact frequently with employees and encourage and mentor them

"Don't talk at your employees; talk with them."

- each leader should remain focused on the issues without getting personal
- each leader must seek feedback and be open to criticism directed toward him/her

6. **Leaders must create teamwork**

- each leader is responsible for creating teamwork in his or her area
- each leader needs to make a commitment to work with others to develop strategies to increase teamwork among our employees

"We still have much to do in the area of creating teamwork at BGSU; we have made progress, but not enough."

- each leader should be willing to facilitate discussion, brainstorming and be comfortable with disagreement
- each leader must initiate teamwork in his/her area and respect it once it has been established
Concluding Remarks/Next Steps:

In his closing remarks, President Ribeau acknowledged that a participatory leadership style will require that leaders learn to feel comfortable with constructive disagreement and that we continue to engage in training in this area. Specific skills are required of participatory leaders and they can be learned through professional development and training, although leaders must make a commitment to engage in the six key leadership elements that make up the professed leadership style at BGSU.

"I am calling upon all of you to become creative, visionary leaders who are willing to make the commitment to attend to this opportunity to learn and develop, and to encourage this development in your employees."

Professional development, the President exhorted, is part of our jobs and part of the jobs of all those who work with us. It is not acceptable to say that we don’t have time. We are members of a learning community, and lifelong learning is required of all of us if we are to take our positions to the next level and achieve the goals that we have set for ourselves and our institution.

Note: These notes were compiled from several sources and present an outline of the President’s address to the “Legions” group on the subject of his leadership expectations for managers and supervisors at BGSU.

ASC - Mission

To support the mission of Bowling Green State University through representing administrative staff members by promoting their general welfare, seeking professional development opportunities, maintaining communications among staff members and recommending initiatives and making recommendations on institutional policies.

ASC - History

Mar. 1982 - A group of contract staff met to assess and express the needs and concerns of all contract staff members of BGSU.
Mar. 1983 - First formal meeting of ASC.
Aug. 1983 - First ASC opening day reception.
1985 - First ASC scholarship awarded.
ASC - Selected Accomplishments

- Addressed and taken a stance on several controversial issues.
- Hosted interesting and insightful speakers.
- Achieved representation on the Board of Trustees.
- Sent resolutions to the state regarding funding inequities to higher education.
- ASC Scholarship endowment of $34,000.

ASC - Working Committees

- Annual Business
- Awards & Special Events
- Executive
- Examiners
- External Affairs
- Finance
- Internal Affairs
- Personnel Welfare
- Professional Development
- Salary
- Student Affairs
ASC - Selected Member Responsibilities

- Attend all ASC meetings
- Inform your constituents of issues involving administrative staff in a timely fashion
- Poll your constituents about issues which will be voted on at ASC meetings
- Represent views of administrative staff in the public arena
- Participate in policy making at ECSC

ASC - Items for 97-98

- ASC Student Scholarship Fund Drive
- ASC Compensation Plan Follow-Up
- Performance-Based Merit System Follow-Up
- Performance Appraisal Process Follow-Up
- Educational Forum on Collective Bargaining
ASC - Items for 97-98 (cont.)

- Update ASC Bylaws due to University reorganization
- Update AS Handbook (e.g. Internal Affairs, Comm. & External Affairs Comp. Charter consideration)
- Part Time Teaching Review
- Develop ASC Web Presence
- Review the AS Grievance Process

ASC - Closing Quote

"Coming together is a beginning; keeping together is progress; working together is success."

Henry Ford
May 11, 1998

Memorandum

To: Dr. Charles Middleton
   Provost

From: Pat Green
       Chair, ASC Personnel Welfare Committee

On behalf of Administrative Staff Council I am forwarding, with great pleasure, the new administrative staff handbook recommendations. These recommendations include a new section on the Administrative Staff Compensation Plan, new grievance recommendations for non-compensation issues, and changes for the current maternity/paternity and fee waiver policies. These documents were approved by Administrative Staff Council on Thursday, May 7, 1998. We would like very much for these to go to the Board of Trustees for approval at the June meeting.

I understand from Becca Ferguson that the Administrative Compensation Group is meeting again on May 18 and will review these documents (hopefully) for the last time and with no major revisions. I also understand the Cabinet must approve them before going to the Board of Trustees. I will work with Becca to keep up to date on the process.

Once again, I can not say enough about the benefits of collaboration. The value of collegiality and the spirit of participatory leadership not only model the university’s core values, but create an environment where staff feel valued and can be more productive. Please express my thanks to all the members of the Administrative Compensation Group. I also want to acknowledge Becca, Donna and Pat in Human Resources for taking the amount of time necessary to ensure the success of this project. I am glad I had the opportunity to be an active part of this “first ever” venture. We certainly have come a long way!

I am also extremely grateful to the members of the Personnel Welfare Committee for all their hard work. I want to take this opportunity to recognize them. The members are Paul Lopez, Joyce Kepha, Sandy LaGro, Sharon Hanna, Ann Beets, and Inge Illopping. It has been a very rewarding year for all of us.

Thank you.

PG:aaf

Enclosures

cc: Deb Boyce
    Judy Donald
    Becca Ferguson
    Sandra MacNevin - Enclosures
    Duane Whitmire
Administrative Staff Council
Spring 1998 Reception

Wednesday, May 20, 1998
3:00-5:00 p.m.
Mileti Alumni Center

Please join your administrative staff colleagues at our spring gathering

Reward-Presentation of the 1997-98 BG Best Awards
Recognize-ASC Representatives Whose Term Expires
Celebrate-A Productive Year with your Administrative Staff Colleagues

Refreshments will be served
ADMINISTRATIVE STAFF SPRING RECEPTION

May 20, 1998

3:00-5:00 P.M.

Mileti Alumni Center

Refreshments

Welcome - Duane Whitmire, 97-98 Chair, ASC

Comments - Sidney Ribeau, President

Recognitions

Reward - 1997-98 BG Best Awards - Presented by Jane Schimpf and Awards and Special Recognitions Committee

Recognize-ASC Representatives Whose Term Expires

Celebrate-A Productive Year with your Administrative Staff Colleagues

Closing by Duane Whitmire
DRAFT OF MERIT FEEDBACK
TO VERBALLY GIVE AT
JUNE BOARD OF TRUSTEES
MEETINGS (Thursday and/or Friday)

- Even though multiple year contracts are not the norm in the business world, you need to be cognizant of the perception, and reality, on campus that faculty have the security of the tenure system and classified staff have the security of the civil service system. This apparent differential treatment of employee groups caused some administrative staff to feel like second class citizens within the community.

- Administrative staff are a concerned group of people in light of the belief that the Administrative Staff Compensation (Mercer) Plan put people in "boxes". Although people below the minimum were raised to the minimum (which was greatly appreciated) employees below the minimum but no progress has been made to identify long-term employees who still find themselves in the first quartile or creatively support employees who will find themselves over the maximum.

- To "jump start" the morale of administrative staff, please reaffirm the commitment made at the September 13, 1996 Board of Trustees meeting when the ten policy recommendations regarding the Administrative Staff Compensation (Mercer) Plan were passed. Namely, to continue the dialog as the implementation of the Plan progressed. For the past year, the dialog between the central administration and the Administrative Staff has focused almost exclusively on the Proposed Principles and Recommendations for a Performance-Based Merit System for Administrative Staff. It is NOW time to direct the efforts to the Follow-Up to the Administrative Staff Compensation Plan that is needed. (maybe include the 10 bullet list that was developed at the 6/10 ASC Exec meeting)
June 16, 1997

MEMORANDUM

TO: Board of Trustees

FROM: Sidney A. Ribeau
President

RE: Proposed Principles and Recommendations for a Performance-Based Merit System for Administrative Staff

Attached are the Proposed Principles and Recommendations for a Performance-Based Merit System for Administrative Staff as passed by the Administrative Staff Council and amended by the Central Administration. Boldfaced sections indicate additions which have been made by the Administration. Deletions are indicated by a line running through the original text. I forward the document to you for your consideration.

dmm
attachment
PRINCIPLES AND RECOMMENDATIONS FOR A PERFORMANCE-BASED MERIT SYSTEM FOR ADMINISTRATIVE STAFF AT BOWLING GREEN STATE UNIVERSITY

The Administrative Staff Council believes that a number of important principles must form the foundation for an effective performance appraisal process and for the equitable distribution of salary increment awards. The Council endorses the concept of a performance-based merit system for awarding employee salary increases provided such a system is fair, equitable, and firmly grounded on these principles. By "merit", the Council means a salary increment that is allotted for performance of duties that meets or exceeds unit expectations. The following principles underlie an effective performance-based merit system:

1. An effective merit system should promote employee recruitment and retention, adequately reward conscientious performance of normal duties and responsibilities, and provide incentives that encourage distinguished, innovative and creative achievements to meet unusual challenges and opportunities when they arise.

2. A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges or departments). The institution should monitor and ensure that employee salaries continue to be commensurate with individual employee's skills, abilities, and experience.

3. A performance-based merit system may include a component of peer-review when appropriate. Appropriateness will be determined jointly by the supervisor and staff member THE PRESIDENT OR AREA VICE PRESIDENT.

4. A performance-based merit system should engender the type, quantity, and quality of performance that contributes to the achievement of institutional and unit missions and goals. The reward system also needs to account for a variety of ways that an employee may support these missions and goals.

5. A performance-based merit system needs to establish a clear connection between employee performance and reward. Meritorious performance should be rewarded in tangible ways. Consideration must be given to significant progression within a salary range or promotion and movement to a new salary range when deemed appropriate. A department or unit must clearly identify the normal expectations and performance standards that are expected of all staff. Through this process, indicators must be identified for performances that fall below standard expectations for merit as well for those types of achievements that surpass the unit's standard expectations.

6. The performance appraisal process should provide employees with constructive comments that enable them to develop professionally and to make improvements in performance.

7. A performance-based merit system must avoid trivializing the system by spreading merit too thinly and thus minimizing the impact of any incentive awards given.

8. Even the best annual review systems may produce salary inequities or may fail to appropriately reward contributions or performances spread over longer periods of time. Thus, an annual merit review system needs to be supplemented by periodic five-year comprehensive reviews on a rotating schedule.

9. A performance-based merit or salary reward system should foster cooperation among staff, should reward individuals for collaborative efforts, and should generate wide support and general satisfaction on the University campus.
10. Both the performance-based merit system and the performance appraisal process will be reviewed annually by ASC, which will make recommendations for modification as appropriate.

Provided these ten principles are followed, the Administrative Staff Council recommends that Bowling Green State University adopt a performance-based merit reward system. The Council believes it is better to improve the existing system than to abandon it completely. What follows are the specific recommendations for an employee performance-based merit system which is specific to administrative staff members.

Recommendations

1. Each year, the University should identify, review, and address employee salaries which may be inequitable, such as the salaries of those individuals who are below the midpoint of their salary grade. Funds should be made available on a regular, on-going basis to correct salary inequities, make market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary, and to support raises for promotions. These funds should not be considered part of the annual merit pool.

2. To establish a clear connection between employee performance and reward, meritorious performance should be rewarded in tangible ways, through significant progression within a salary range, or promotion, and movement to a new salary range when deemed appropriate. EACH EMPLOYEE WILL HAVE A PERFORMANCE EVALUATION PLAN WHICH SPECIFIES PERFORMANCE INDICATORS TO BE REWARDED.

   a. Upon the completion of five years of meritorious assessments, an employee's salary shall be reviewed and increased to further progression through the designated salary range. The amount awarded will be contingent upon available institutional resources.

   b. After five consecutive years of meritorious assessments, the employee shall be granted an annually-renewable, five-year contract with provisions for annual salary increases. Annual renewal will be contingent upon continued meritorious performance.

3. A performance-based merit system must be administered openly and reliably. Thus, changes in evaluation and merit pay criteria must be completed before the new contract year, i.e. before June 30 of the prior contract year. To ensure that employees can contest unfair merit assessments, timely disclosures of merit performance evaluations are necessary. Continual dialogue between the supervisor and the employee about progress towards goals is essential.

   TIME DEADLINES

   a. Performance appraisal forms must be completed by May 31 of the prior contract year.

   b. Meritorious assessment EVALUATIONS must be known at the completion of the evaluation process by May 31.

   c. Merit criteria must be known prior to start of the next contract year.

   d. A supervisor will meet with employees between November 15 and January 15 for a dialogue on progress toward their annual goals. The supervisor will document at that time an employee's performance which is falling below a satisfactory level. The supervisor will be expected to continue to engage in on-going dialogue with the employee to improve employee performance.
4. A supervisor's merit evaluation will include an assessment of the completion of performance evaluations and merit pay recommendations for their staff on time. Failure to do so will be deemed performance below expectations.

5. THE DEPARTMENT OF Human Resources will review all annual performance evaluations and merit pay recommendations to ensure consistency and integrity. Issues concerning the process will be communicated to ASC-PWC on an annual basis.

6. The annual merit allocation should be based upon the meritorious accomplishments over the most recent three-year period on a rolling basis, i.e., each year new information is added to the file for the most recent year and information for the oldest year is eliminated from the file. This will help to reduce inequities that can result from differences in the merit funds available each year and from fluctuations in performance that may occur from year to year.

7. All employees will be evaluated in their annual performance reviews to determine their eligibility for merit. Merit eligibility is determined by the job performance of an employee, as assessed by the Administrative Staff Performance Appraisal Form. Performing one's job at a satisfactory level and in a competent manner is the basis for merit pay. Given that an employee will qualify for a merit increase by meeting, as well as exceeding, unit standards, it is expected that very few employees will fail to qualify for merit.

8. Any employee who does not qualify for merit in their annual performance review should not receive a salary increase. A professional development fund equal to the uniform percentage increase that would have been allocated to the individual, should be made available to the department or academic unit for employee development, with priority given to assisting employees who have failed to qualify for a merit increment.

9. If the total merit pool for salary increments in a given year is three percent (3%) or less, all employees who qualify for merit in their annual performance reviews will receive the same percentage increase in salary.

10. If the total merit pool for salary increments in a given year is more than three percent (3%) but less than five percent (5%), it will be allocated according to the following guidelines:

   a. Three percent (3%) of the total salaries of employees shall be allocated as a three percent (3%) increase in salary to all employees who qualify for merit based on their annual performance reviews.

   b. The remaining difference between the total merit pool and the three percent (3%) of the total salaries of the administrative staff shall be allocated to departments and units for recognition of those employees whose level of performance exceeds department or unit expectations as defined by the merit policy of the department or unit.

11. If the total merit pool is five percent (5%) or more, it will be allocated according to the following guidelines:

   a. Sixty percent (60%) shall be allocated to departments/units to be used as an equal percentage increase in salary to all employees who meet or exceed department/unit expectations and thereby qualify for merit in their annual performance reviews.

   b. Forty percent (40%) shall be allocated to departments/units for recognition and reward of those employees whose level of performance exceeds department/unit expectations as defined by the merit policy of the department/unit.

Approved by Administrative Staff Council - June 5, 1997
Amended by Central Administration - June 16, 1997

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**Note:** Technology group will have 2 reps too many in 1998-99. Our recommendation is the 2000 members should be moved into 2001 and two of the 1999 moved into 2000.

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Swears remains
Paul
Deb
Joyce Blair

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June 30, 1998

Memorandum

To: Becca Ferguson
Assistant Provost

From: Pat Green, Chair
ASC Personnel Welfare Committee

PWC met yesterday with members of HR present to discuss how to proceed with the progression study and placement in the pay ranges of administrative staff. Before progression through the ranges can be adequately addressed, PWC feels that administrative staff who have been here should be appropriately placed in the ranges. Compensation plans such as ours, recommend that employees should have mechanisms to reach the midpoint of a range anywhere from 7-9 years. Therefore we have been compiling data, with the help of Human Resources, to determine how much it would cost to place employees correctly in the ranges so all staff are on a level playing field to move forward. In an interesting twist, the nature of this project has taken on significant proportions due to the Board of Trustees voting to move to 100% merit beginning next year. Rather than stagger our recommendation over three years, the committee will recommend the all the adjustments be made next year before we move to full merit. We determined that after we move to full merit there would be no way to evaluate a staff member's proper placement in the range.

Concurrent with this study we have identified the following issues, again as a result of the movement to full merit, that must be addressed simultaneously with the placement issue and become part of a proposal:

1. Progression to the midpoint in 7-9 years based on merit
2. Definition of merit and criteria
3. Inconsistencies of current merit document
4. Merit tied to performance evaluation/goal setting
5. Movement of the pay range
6. Current handbook: policies – i.e. new hires in January forward not entitled to any merit
7. Goal setting cycle – i.e. staff goals set in May, University goals announced at Opening Day
8. Evaluation of performance evaluation instrument

PWC will work on this very aggressive agenda this year in order to get a proposal to the administration and Board of Trustees for implementation prior to full merit. This probably means we will have to have something Board approved in February or March prior to next year’s performance evaluation.

Once again, we look forward to working with HR on these issues in a collaborative fashion. Donna Wittwer has agreed to gather some benchmark information from other colleges and universities and have it for a meeting on August 12.

I will be happy to answer any questions.