

1989

Fee Waiver 1984-1989

Bowling Green State University. Administrative Staff Council

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Index: ☐ Included ☐ Separate ☒ None

Notes

1. Colored Paper
2. Colored Ink
3. Photocopies

To: Susan! Ransom 1
From: Susan! Ransom!

This is one of the
items that needs
to be put in the
Ginobook.



Bowling Green State University

*Marcia - pls file 2
with changes for
85-86*

Vice President for
Academic Affairs
Bowling Green, Ohio 43403
(419) 372-2915
Cable: BGSUOH

September 18, 1984

TO: Art Neal
✓ Susan Caldwell
Richard Rehmer

FROM: Eloise E. Clark
Vice President for
Academic Affairs

E.E. Clark

It has recently come to my attention that during editing of the Handbook for 1981-82, the reference to fee waivers for spouse and children of emeritus faculty was inadvertently omitted. In future editions of the handbooks, please re-insert the reference to emeritus faculty.

The second section of the policy* should, therefore, read as follows:

Spouse/Child

The child or children and/or cohabitant spouse of a full-time employee including faculty, emeritus faculty, and Civil Service (or local equivalent of Civil Service), and employees of the Departments of Aerospace Studies and Military Science, who has completed five years of full-time service at Bowling Green State University . . .

* Faculty Handbook, B.II.4.B, page 1 of 5
Administrative Staff Handbook, pages 22-23
Classified Handbook, page 7

(BGSU)

C. FEE WAIVERS AGREEMENT BETWEEN BOWLING GREEN STATE UNIVERSITY AND THE UNIVERSITY OF TOLEDO: (UT)

A reciprocal agreement exists between BGSU and UT whereby full-time employees of one university may take courses ^{at} ~~at~~ the other university with a waiver of fees. This covers full-time employees only and does not include waivers for dependents.

1. It will be necessary to be properly admitted as a student (either undergraduate or graduate) at UT before enrolling for courses.
2. Expense authorization forms are available in the Office of Administrative Personnel Services.

D. CONTINUING EDUCATION COURSES: Administrative staff members are entitled to a 20% discount on registration for most non-credit courses and conferences offered through the Office of Continuing Education.

the following conditions apply:

1. ~~an~~ employee must be properly admitted as a ~~stud~~ undergraduate or graduate student at UT before ~~enroll~~ registering for courses.
2. EAF must be filed & approved. These forms are avail in O of APS.

II. PART-TIME EMPLOYEE:

A. ELIGIBILITY: A permanent part-time administrative staff member is one who works less than 40 hours a week on a regular schedule and whose contract indicates part-time status. ~~Staff-members-whose contract-is-temporary-are-not-included-in-these-definitions-and, therefore,-are-not-eligible-for-these-benefits.~~ Permanent Part-time administrative staff who have completed the equivalent of one full year of service at Bowling Green State University (2080 hours or twelve full months) are eligible for an employee fee waiver.

B. BENEFIT: The fee waiver benefit is prorated according to the percentage of time ^{an employee works.} ~~worked.~~ Staff with contracts of 75% - 99% are eligible for 3 courses ^{per year} ~~PER YEAR~~; staff with contracts of 50% - 75% are eligible for 2 courses ^{per year} ~~PER YEAR~~; staff with contracts of 25% - 49% are eligible for 1 course ^{per year} ~~PER YEAR~~.

The fee waiver benefit allows ^{permanent} part-time staff members to enroll in courses, not to exceed two per academic term, on either an audit or credit basis without payment of instructional or general fees according to same same restrictions noted above for full-time staff. (cf. conditions above.) * **

III. SPOUSE/CHILD:

A. ELIGIBILITY: ^{for a permanent administrative staff member} The child or children and/or cohabitant spouse of a full-time ~~employee, including faculty, individuals who have emeritus status, administrative staff and Civil Service employees (or local equivalent of Civil Service), and employees of the Departments of Aerospace Studies and Military Science, who have completed five years of full-time service at Bowling Green State University.~~ ^{has been able to receive fee waiver benefits provided that:} ~~PROVIDED THAT:~~

1. The individual is eligible to be considered a personal exemption under the provision of Section 151 of the Internal Revenue Code or
2. in the case of a natural or adopted child who is not claimed by the employee for federal tax purposes under IRS regulations, ~~that~~ the earnings of the child are less than \$1,000 in any calendar year and the employee-parent provides \$1,200 or more of support in any calendar

delete waiting period

KCSU

year. An employee is required to certify in a notarized statement that the eligibility conditions are met under provision (2).

employee

child/spouse

B. BENEFIT: May enroll without payment of the instructional fee either as a full-time or as a part-time student at the University, on the campus or at any off-campus branch or center.

and any
The general fee ~~and any~~ other course fees or charges ~~will be~~ paid by the student will pay

III. WIDOW/WIDOWER OR CHILD OF A DECEASED ADMINISTRATIVE STAFF MEMBER:

A. ELIGIBILITY: The widow/widower or child of a deceased full-time administrative staff member who ~~has~~ completed five years of full-time service at Bowling Green State University ^A provided that:

leave waiting period?

is eligible to receive fee waiver benefit at the time of death

1. The individual was eligible to be considered a personal exemption under the provision of section 151 of the Internal Revenue Code.
2. In the case of *a* natural or adopted child who was not claimed by the deceased employee for federal tax purposes under IRS regulations, ~~that~~ the earnings of the child are less than \$1,000 in any calendar year and the deceased employee-parent provided \$1,200 or more of support in any calendar year.

This policy does not apply if ^a the staff member's appointment was terminated for any reason other than by retirement, death, or sickness which led to death.

B. BENEFIT: May enroll without payment of the instructional fee either as a full-time or part-time student at the University, on the campus, or at an off-campus branch or center. ~~The general fees and any other course fees or charges will be paid by~~ *(the student will pay)*

C. APPEALS: Appeals of the application of these procedures should be made to the President of the University.

~~It say the appes~~

3. An employee must initiate a fee waiver form -- available in *8* office of Administr. Staff Personnel Services -- to receive benefits for his/her spouse or child.

IV. RETIRED ADMINISTRATIVE STAFF:

A. ELIGIBILITY: A staff member who has formally retired into STRS or PERS

B. BENEFIT:

Retired adm. staff

1. May take courses on a space available basis.

2. undergraduate instructional fees are waived for dependents of retirees ~~during the time~~ ^{while} retiree is employed ENROLLED ^{small} under the provisions of the Supplemental Retirement Program.

may be able to receive fee waiver benefits.

V. OTHER:

APPEALS combine A & C

A. ~~PRESIDENT~~: The President of the University is authorized, effective as of September 1, 1976, to provide for the payment of the instructional fee under circumstances determined to be exceptional and appropriate.

B. For further information, and forms for any of the above fee waiver benefits contact the ^{Office} ~~OFFICE~~ OF Administrative Staff Personnel Services.

~~C. Appeals~~



WBGU-TV 57, Bowling Green State University, Bowling Green, Ohio 43403 phone: (419) 372-0121

May 11, 1985

TO: ASC Welfare Committee

From: Pat Fitzgerald *PZ*

RE: Fee Waiver Policy

Here's the draft I volunteered to put together for our discussion at our next meeting. I left plenty of holes in it for your valued input. After rearranging it, there are parts that seem to be alot clearer to me, but it may still be too wordy.

"a lot" is 2 words!

XC: Susan Caldwell

8

FEE WAIVER POLICY (EGSU Trustees, 1976, Revised July 23, 1982, December 10, 1982)

The policy governing these administrative staff benefits shall be as follows:

I. FULL-TIME EMPLOYEE:
For purposes of this policy)

A. ELIGIBILITY: *^* A full time administrative staff member is one who works 40 hours a week on a regular schedule and is employed full-time for a minimum of nine months a year (including an individual employed full-time at the University but compensated by another agency such as POTO or a *granting* research agency) *X*

B. BENEFIT: May enroll in four courses each year, not to exceed two courses per academic term*, on either an audit or credit *if* basis without payment of the instructional or general fees *IF:*

1. Employee initiates *a* request *via* through a "Fee Waiver Form:" *these forms are* available through the office of Administrative Staff Personnel Services *^*
2. *an employee's* supervisor certifies that the individual's enrollment will not interfere with the discharge of duties as a University employee **** *X*
3. *An employee's* enrollment in the course is approved by the appropriate academic dean or area administrator who will then forward the form to Administrative Staff Personnel Services for processing.
4. *An employee's* enrollment will not prevent a regularly registered student from attending the class section *X* and
5. Enrollment for the course occurs in the Office of Registration and Records.

* An accounting of courses taken each year begins with the fall semester (*i.e.*, from fall semester through the following summer session each year a maximum of four courses may be taken with fees waived, not to exceed two courses per academic term).

** In order to avoid interruptions on the job, administrative staff members should whenever possible register for classes which meet outside their regular work schedule. When this is not possible, staff members may, with the approval of their supervisors, enroll for a class during the normal workday. All time taken from the regular workday to attend classes must be made up.

? → we don't work by the hour

Section Two Minutes

	<u>BOSU</u>		<u>Cleveland</u>		<u>Miami</u>		<u>Kent</u>		<u>Utah</u>	
	<u>Dep.</u>	<u>Emp.</u>	<u>Dep.</u>	<u>Emp.</u>	<u>Dep.</u>	<u>Emp.</u>	<u>Dep.</u>	<u>Emp.</u>	<u>Dep.</u>	<u>Emp.</u>
1. Agreements - employees?	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
2. What is waiting period?	5 yrs F/T	immediate	3 yrs	immediate	3 yrs. or less	immediate	immediate	immediate	immediate	immediate
3. What is exempt? (Terminals)?	can be F/T students - spouse & children	may be covered on gr.	can be F/T students	may be covered on gr. (can take cert. at. covered to avoid)	no limits	no limits	unlimited children F/T covered - including, son, etc.	unlimited children F/T covered - including, son, etc.	unlimited children F/T covered - including, son, etc.	unlimited children F/T covered - including, son, etc.
4. Is there reciprocity with other states?	No	Yes - UT	No	No	No	No	No	No	No	Yes - BOSU
5. How much does the state pay?	Instructional fees	Instructional - gen. fees	100% covered - 50% - grad.	100% covered - 50% - grad.	100% tuition only	100% tuition only	100% tuition only	100% tuition only	100% tuition only	100% tuition only
6. Are F/T, P/T, etc. covered?	F/T	F/T & P/T	F/T	F/T	F/T	F/T	F/T	F/T	F/T	F/T
7. Is coverage for grad. & non-grad. covered?	Yes, if dependent	Yes	yes if both	yes if both	both	both	both	both	both	both

Enrichen Die Thematik

Child

MCOI

	<u>DEP</u>	<u>EMP</u>	<u>DEP</u>	<u>EMP</u>	<u>DEP</u>	<u>EMP</u>	<u>DEP</u>	<u>EMP</u>
1. Requirements & employees?	yes	yes	yes	yes				
2. What is waiting period?	immediate	immediate	immediate	immediate				
3. What is benefit (if covered)?	can be F/T	job market 100%	40% to 100% at any accredited institution	75% just cover 50% acc. not to exceed 10 min per F/T as any kind				
4. Is there reciprocity with other states?	NO	NO						
5. Who must also the individual pay?		100% individual → me per fee						
6. Can F/T, P/T still covered?	F/T	F/T	F/T	F/T (75% of maximum per year)				
7. Is coverage for dual coverage allowed?	both	both	both	both				

University: _____

Education

1. Who is eligible (F/T, P/T)?
2. What is maximum accumulation?
3. What is waiting period?
4. How much is paid at termination?

<u>OSU</u>	<u>Cleveland</u>	<u>Milwaukee</u>	<u>Spent</u>
Both; P/T pro-rated	Both; P/T pro-rated	F/T (if 32 mo. or less with a month for 10 mos.)	F/T (at least 11 mo.)
40 days max (20 days per yr.)	44 days max. (20 days per yr.)	40 days * 16 days - 12 mos. 20 days - 11 mos. 22 days - 12 mos.	60 days max (20 days per yr.)
1 yr.		none	none
40 days	22 days	40 days	60 days

* Miami - anything in excess of 40 days goes into a disability release account)

20 days is credited at beginning of yr. - accumulated by down dates.

University: _____

Educator

1. Who is eligible (F/T, P/T)?
2. What is maximum accumulation?
3. What is waiting period?
4. How much is paid at termination?

<u>State</u>	<u>Ohio</u>	<u>MCOI</u>
F/T (P/T pro-rated)	F/T (11 or 12 mo) P/T (11 or 12 mo, pro-rated)	F/T
72 days max (24 days/yr.)	30 days max (22 days/yr.)	60 days max (22 days/yr.)
1 yr.	none	none
48 days	30 days	60 days



Bowling Green State University

Administrative Staff
Personnel Services
Bowling Green, Ohio 43403-0086
(419) 372-2558
Cable: BGSUOH

July 23, 1985

MEMORANDUM

TO: Paul Yon, Director
Center for Archival Collections

FROM: Shirley Colaner^{sc}, Coordinator
Contract Personnel Information

SUBJ: Fee Waiver Statistics

Attached is the information you requested concerning the number of faculty, administrative staff and classified staff who requested fee waivers for their dependents during the Academic Years 82-83, 83-84 and 84-85. The total number of dependents for these requests is also indicated.

This information basically represents the requests we received; we have no way of knowing whether these dependents follow through and attend classes.

If you have any questions, please call me at 2-2558.

Attachment

DEPDENENT FEE WAIVER STATISTICS

	<u>ACADEMIC YEAR</u>	<u>TOTAL NO. STAFF FEE WAIVER REQUESTS</u>	<u>TOTAL NO. DEPENDENTS</u>
<u>ADMINISTRATIVE:</u>	82-83 FALL	27	35
	SPRING	34	38
	SUMMER	22	25
	83-84 FALL	37	40
	SPRING	44	48
	SUMMER	27	29
	84-85 FALL	40	43
	SPRING	43	47
	SUMMER	32	33
<u>CLASSIFIED:</u>	82-83 FALL	59	70
	SPRING	67	78
	SUMMER	46	53
	83-84 FALL	81	85
	SPRING	87	90
	SUMMER	47	51
	84-85 FALL	85	85
	SPRING	88	90
	SUMMER	55	59
<u>FACULTY:</u>	82-83 FALL	165	206
	SPRING	171	207
	SUMMER	124	143
	83-84 FALL	169	199
	SPRING	162	194
	SUMMER	131	155
	84-85 FALL	190	217
	SPRING	178	205
	SUMMER	136	163

I. Slanted Accumulation as of 5/20/35

- 224 (by 300) years returned

30.1 - 35.1 days

35.1 - 39.7 days

40 days

25

22

16

II. Years of Service as of 5/20/35

25+ years	-	13
20-24 years	-	12
15-19 years	-	31
10-14 years	-	33
5-9 years	-	78
1-4 years	-	132
0 years	-	64

Resignations - Full-time Administrative Staff 1983-84

	<u>Men</u>	<u>Women</u>
Another job	10	11
Marriage	0	2
Moving	0	2
Retirement	0	2
Professional Reasons	0	2
Return to School	1	3
Dissatisfaction	0	1
Other (personal)	<u>0</u>	<u>1</u>
Totals	11	24

Resignations - Full-time Administrative Staff 1984-85

	<u>Men</u>	<u>Women</u>
Another job	8	13
Marriage	0	2
Moving	1	3
Retirement	5	4
Dissatisfaction	1	1
Care for family member	1	0
Pursuing employment elsewhere	1	0
Personal	<u>0</u>	<u>2</u>
Totals	17	25



Center for Archival Collections
5th Floor, Jerome Library
Bowling Green, Ohio 43403-0175
(419) 372-2411
Cable: BGSUOH

Holdings: Northwest Ohio
University Archives

M E M O R A N D U M

TO: Susan Caldwell, Administrative Staff Personnel
Susan Darrow, Honors Program
Pat Fitzgerald, WBGU-TV
Norma Stickler, Academic Affairs

FROM: Paul Yon, CAC *Paul*

RE: Dependent Fee Waiver & Administrative Staff Statistics

DATE: September 9, 1985

These statistics may be of interest to you. We will probably discuss these on Wednesday at 10:00a.m. in the Archives.

TUITION FEE WAIVER - DEPENDENTS
ADMINISTRATIVE STAFF POLICY
SURVEY OF STATE UNIVERSITIES IN OHIO

	Eligible Staff	Waiting Period	Benefit	Courses Covered
Akron	F/T	Immediate upon employment	Instructional fee	Graduate & Undergraduate
Bowling Green	F/T	After 5 years full-time service	Instructional fee	Graduate & Undergraduate
Central	F/T	After 1 year of service	Instructional and general fees	Undergraduate
Cincinnati	Permanent F/T or P/T, 50% or greater	Immediate upon employment	Instructional and general fees	Graduate & Undergraduate
Cleveland	F/T	After 3 years of service	100% of fees for undergrad; 50% for grad. Each individual is limited to 12 quarters of registration.	Graduate & Undergraduate
Kent	F/T	Immediate upon employment	Instructional and general fees	Graduate & Undergraduate
Medical College	F/T Faculty only	Immediate upon employment	\$1,500 max. per child per year to attend any institution.	Undergraduate
Miami	F/T (defined as anyone working at least 32 hours per week, at least 9 mos. per year).	After 3 years continuous F/T service	Instructional and general fees	Graduate & Undergraduate

TUITION FEE WAIVER - DEPENDENTS
ADMINISTRATIVE STAFF POLICY
SURVEY OF STATE UNIVERSITIES IN OHIO
Page 2

	Eligible Staff	Waiting Period	Benefit	Courses Covered
Ohio State	*	*	*	*
Ohio University	F/T, P/T (pro-rated)	Immediate upon employment	Instructional fee	Graduate & Undergraduate
Toledo	F/T, P/T - 50% or more -pro-rated	After 1 year of service	Children - all fees except general Spouse - all fees	Undergraduate
Wright State	Contract for 75% or more	Immediate upon employment	80% of all fees	Graduate & Undergraduate
Youngstown	F/T	Immediate upon employment	Instructional Fee	Graduate & Undergraduate

*No response from Ohio State as of November 4, 1985.

VACATION POLICY FOR ADMINISTRATIVE STAFF
SURVEY OF STATE UNIVERSITIES IN OHIO

	Annual Rate of Accrual	How Accrued	Maximum Accrual	Payment at Termination
Akron	22 days	Monthly (1.833 days per month)	Cannot exceed 22 days on July 1 (can exceed 22 days during the year)	22 days
Bowling Green	20 days	Monthly (1.67 days per month)	Cannot exceed 40 in any month	40 days
Central	20 days	Accrue 40 hours at end of each quarter (Jan.-Mar., Apr.-June July-Sept., Oct.-Dec.)	Cannot exceed 160 hours (20 days) on July 1 (can exceed 160 hours during the year.)	20 days (160 hrs.)
Cincinnati	22 days	Monthly (1.83 days per month)	Cannot exceed 66 days in any month	66 days
Cleveland	22 days	Accrue every pay period (twice a month)	Cannot exceed 44 days in any pay period	22 days
Kent	20 days (25 days after 25 years svc.)	Credited at beginning of fiscal year (or pro- rated if start after after July 1)	60 days (75 days) balance at the end of fiscal year	60 days (75 days)
Medical College	20 days	Bi-weekly pay period 6.14 hours per pay period	Cannot exceed 40 days (320 hours) in any pay period	20 days
Miami	22 days	Accrued monthly, but recorded only at end of year.	Cannot exceed 40 days on June 30	40 days

VACATION POLICY FOR ADMINISTRATIVE STAFF
SURVEY OF STATE UNIVERSITIES IN OHIO
Page 2

	Annual Rate of Accrual	How Accrued	Maximum Accrual	Payment at Termination
Ohio State	20 days	*	*	*
Ohio University	22 days	Two days per month except no accrual in June	Cannot exceed 33 days in a month	30 days
Toledo	24 days	Bi-weekly pay period 7.4 hours per pay period.	Cannot exceed 72 days in any pay period	48 days
Wright State	22 days	Monthly (1.83 days per month)	Cannot exceed 44 days in any month	44 days
Youngstown	22 days	Monthly (1.83 days per month; except 1.87 days in June	Cannot exceed 33 days in any month	None - use up vacation by extending termination date by amount of vacation credit

*No response from Ohio State as of November 4, 1985.



Bowling Green State University

23
Vice President for
Planning and Budgeting
Bowling Green, Ohio 43403
Cable: BGSUOH

September 23, 1985

MEMORANDUM

TO: Paul Yon
FROM: Elton Ringer
RE: Employee and Dependent Fee Waivers

As background for our meeting on October 8, I have prepared a few thoughts which may facilitate committee discussion. I will try to be factual and brief.

- 1) State accounting procedures require the universities to bill for all student fees--and to report all fees as available income.

Universities may also establish expense budgets to cover scholarships, fee waivers (payments), or grants. However, these items must be budgeted and reported like all other departmental expenses (salaries and operating expenses).

Therefore, the University's Educational Income Budget includes all student fees billed by the Bursar's Office. The fee waivers (payments) are then processed from either Educational Expense Budget #189025 or from the respective Auxiliary Budgets.

- 2) When an employee registers for a course, the Instructional Fee and General Fee are billed as income by the Bursar's Office. When the employee submits a fee waiver form, the appropriate expense budget is charged. A similar procedure is followed for eligible dependents.

By contrast, when a regular student enrolls, student fee income is billed but there is no off-setting expense (except for scholarships and grants).

Theoretically, the University is "financially ahead" if all students are "cash-paying" students. Also, theoretically, with an enrollment ceiling, potential cash-paying students can be denied admission (by the number of students having fees waived).

- 3) State Subsidy. The state enrollment subsidy is determined by the level of program provided. Probably employees enroll for the higher subsidy programs; dependents (children) generate average subsidy rates; and spouses probably enroll for above average subsidy rates.

Paul Yon
Sept. 23, 1985
Page 2

4) Estimated fee waivers for 1985-86 are as follows:

Dependent fee waivers - Instructional Fees	\$475,000
Employee fee waivers - Instructional and General Fees	<u>255,000</u>
	\$730,000

5) In my opinion, by reducing (or eliminating) the five-year employment requirement before becoming eligible for dependent fee waivers, we could expect:

- a) An enhanced recruiting benefit (for good and poor applicants).
- b) An increase in the fee waiver expense budget (perhaps from \$50,000--\$200,000 depending upon options). This would become a mandated priority budgetary claim, thus reducing the "pool" for other potential needs.
- c) Less emphasis upon "career employment" benefits. Should "new employees" have equal benefits with "career employees"? A few might accept employment primarily to educate dependents, then resign.
- d) There are pros and cons concerning all benefits--some BGSU employees consider family insurance benefits as unfair to single employees. This argument could also apply to "fee waivers for dependents."

6) These (and other) items can be discussed at the October 8 meeting.

ER:ah

Elton Ringer

November 5, 1985

Administrative Staff Council
Dependent Fee Waiver Questionnaire

The Personnel Welfare Committee of the Administrative Staff Council is reviewing the dependent tuition fee waiver policy. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 231 Administration by November 25, 1985.

Department: _____

Number of years of full-time employment: _____ (0-5 years)

Marital Status: _____ Single _____ Married

Is spouse employed at BGSU? _____ Yes _____ No

If yes, _____ Full-time _____ Part-time

_____ Number of years of full-time employment

If a dependent fee waiver had been available upon your employment at BGSU, how many of your dependents would have taken advantage of it this year? Please indicate number of dependents in each category. (You are limited to only one spouse.)

_____ Spouse

_____ Undergraduate

_____ Graduate

_____ Full-time

_____ Full-time

_____ Part-time

_____ Part-time

_____ Children

_____ Undergraduate

_____ Graduate

_____ Full-time

_____ Full-time

_____ Part-time

_____ Part-time

Name: _____

(The current dependent fee waiver policy is on the reverse side.)

SPOUSE/CHILD

The child or children and/or cohabitant spouse of a full-time employee, including faculty, individuals who have emeritus status, administrative staff, and Civil Service employees (or local equivalent of Civil Service), and employees of the Departments of Aerospace Studies and Military Science, who have completed five years of full-time service at Bowling Green State University, may enroll without payment of the instructional fee either as a full-time or as a part-time student at the University, on the campus or at any off-campus branch or center, provided that (1) the individual is eligible to be considered a personal exemption under the provision of Section 151 of the Internal Revenue Code or (2) in the case of natural or adopted child who is not claimed by the employee for federal tax purposes under IRS regulations, that the earnings of child are less than \$1,000 in any calendar year and the employee-parent provides \$1,200 or more of support in any calendar year. An employee is required to certify in a notarized statement that the eligibility conditions are met under provision (2). The general fee and any other course fees or charges will be paid by the student.

Instructional and general fees are waived for faculty and staff who have formally retired into STPS or PERS and who wish to take courses on a space available basis. In addition, undergraduate instructional fees are waived for dependents of retirees during the time retiree is employed under provisions of the Supplemental Retirement Program.

The President of the University is authorized, effective as of September 1, 1976, to provide for the payment of the instructional fee under circumstances determined to be exceptional and appropriate.

Administrative Staff Council
Dependent Fee Waiver Questionnaire

The Personnel Welfare Committee of the Administrative Staff Council is working on the possibility of reducing the number of years of service to BGSU needed to qualify for the dependent fee waiver. Refer to the dependent fee waiver (DFW) in the Administrative Staff Handbook, p. 24. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 231 Administration Building by _____.

Name:

Title:

Campus Address:

Campus Phone:

Today's Date:

Number of complete years of full-time work at BGSU:

Dependents: _____ Spouse _____ Number of Children _____ Ages of Children

If you have more than 5 years of full-time service to BGSU, please answer the following:

If the DFW had been available upon your employment at BGSU, please estimate how your dependents would have used the benefit:

<u>First year</u>	<u>Undergraduate</u>	<u>Graduate</u>	<u>Part-time</u>	<u>Full-time</u>
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
<u>Second year</u>	<u>Undergraduate</u>	<u>Graduate</u>	<u>Part-time</u>	<u>Full-time</u>
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
<u>Third year</u>	<u>Undergraduate</u>	<u>Graduate</u>	<u>Part-time</u>	<u>Full-time</u>
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
<u>Fourth year</u>	<u>Undergraduate</u>	<u>Graduate</u>	<u>Part-time</u>	<u>Full-time</u>
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
<u>Fifth year</u>	<u>Undergraduate</u>	<u>Graduate</u>	<u>Part-time</u>	<u>Full-time</u>
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____

If you have less than 5 years of full-time service to BGSU, please answer the following:

If the DFW had been available upon your employment at BGSU, please estimate how your dependents would have used the benefit:

Is your spouse employed at EGSU? _____ Yes _____ No

If the above answer is "Yes", how many years of full-time employment has your spouse served at EGSU? _____

Comments on other issues you would like the Personnel Welfare Committee to study:

Thank you.

Administrative Staff Council
Dependent Fee Waiver Questionnaire

The Personnel Welfare Committee of the Administrative Staff Council is working on the possibility of reducing the number of years of service to EGSU to qualify for the dependent tuition fee waiver. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 231 Administration by _____.

Name: _____ Title: _____
 Campus Address: _____ Campus Phone: _____
 Today's Date: _____ Date of Hire: _____
 Number of Dependents: _____ Spouse _____ Number of Children _____
 Ages of Children _____
 Other Dependents (please explain): _____

If a dependent fee waiver had been available upon your employment at EGSU, would your dependents have used the benefit? ☐ Yes ☐ No

If the answer to the above question is "yes", approximately how many courses could your dependent(s) have taken between then and the present date?

Comments on the Dependent Tuition Fee Waiver:

Comments on other issues you would like the Personnel Welfare Committee to study:

Thank you.

Administrative Staff Council
Dependent Fee Waiver Questionnaire

add review policy in handbook p. 23

The Personnel Welfare Committee of the Administrative Staff Council is working on the possibility of reducing the number of years of service to EGSU to qualify for the dependent tuition fee waiver. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 231 Administration by _____.

Name:

Title:

Campus Address:

Campus Phone:

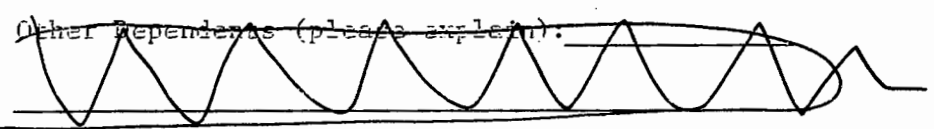
Today's Date:

complete years
No. of ~~years~~ ^{years} of full-time work at EGSU _____

Number of Dependents: _____ Spouse

Number of Children _____

Ages of Children _____

Other Dependents (please explain):


If a dependent fee waiver had been available upon your employment at EGSU, would your dependents have used the benefit? Yes _____ No _____

prior to the end of the 5 year waiting period?

If the answer to the above question is "yes", approximately how many courses would your dependent(s) have taken between then and the present date?

grad undergrad

5 years present
↓ *1st year* *2nd year* *3rd year* *4th year* *5th year*
spouse *children* *grad* *end of the 5 year waiting period?*

Comments on the Dependent Tuition Fee Waiver:

would you be in favor of?

Which of your dependents would have taken it,
— spouse
— children

Comments on other issues you would like the Personnel Welfare Committee to study:

If spouse employed at U & for how long? Would spouse take grad / undergrad courses?

Thank you.

If 5 yrs + ^{approx} how many courses

Administrative Staff Council
Dependent Fee Waiver Questionnaire

The Personnel Welfare Committee of the Administrative Staff Council is working on the possibility of reducing the number of years of service to EGSU needed to qualify for the dependent fee waiver. Refer to the dependent fee waiver (DFW) in the Administrative Staff Handbook, p. 24. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 331 Administration Building by _____.

Name: _____ Title: _____
Campus Address: _____ Campus Phone: _____
Today's Date: _____

Number of complete years of full-time work at EGSU: _____

Dependents: _____ Spouse _____ Number of Children _____ Ages of Children _____

A If you have ~~more than~~ ^{completed} 5 years of full-time service to EGSU, please answer the following: questions IF not in sections immediately CC B.

If the DFW had been available upon your employment at EGSU, please estimate how your dependents would have used the benefit: Again, be accurate

First year	Undergraduate	Graduate	Part-time	Full-time
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
Second year	Undergraduate	Graduate	Part-time	Full-time
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
Third year	Undergraduate	Graduate	Part-time	Full-time
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
Fourth year	Undergraduate	Graduate	Part-time	Full-time
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____
Fifth year	Undergraduate	Graduate	Part-time	Full-time
_____ Spouse	_____	_____	_____	_____
_____ Child(ren)	_____	_____	_____	_____

B If you have less than 5 years of full-time service to EGSU, please answer the following:

If the DFW had been available upon your employment at EGSU, please estimate how your dependents would have used the benefit:

If you have - 5 yrs of service, how would your dep use & DFW if it were lowered → 3 years.

Is your spouse employed at EGSU? Yes No

If the above answer is "Yes", how many years of full-time employment has your spouse served at EGSU?

Comments on other issues you would like the Personnel Welfare Committee to study:

Thank you.

*Change form - spouse
child*

Dependent Fee Waiver
Questionnaire Responses
3-5 yrs. experience

responses = 24

marital status - married - 21

single 3

spouse employed at BG SU - yes - 8
no - 13

If yes, full-time - 7

number of years - 10, 19, 1, 7, 4, 5, 6

would use fee waiver -

spouse - 9

undergraduate - 4

full-time - 2

part-time - 2

graduate - 5

full-time 0

part-time 5

children

undergraduate 2

full-time - 1

part-time - 1

children attending under spouse's fee
waiver - 2

82 responses

years under 1 - 24

1	20
2	13
3	12
4	8
5	4

marital status m = 57 single = 23

spouse at BG: yes = 16
no = 46if yes, FT = 13
PT = 3

yrs if full time

1	(3)
2	(2)
3	(1)
4	(1)
5	(1)
6	(1)
7	(1)
19	(2)

would use

Spouse 32

Underg = 14
FT = 4
PT = 10

Grad = 16
FT = 2
PT = 14

Children 5

Underg. 4
FT = 3
PT = 1

Project ~ 20 FTE
undergrad
~ 14 FTE grad
for contract staff

196 less than 5 yrs. service

82 responses

Questionnaire 34

<u>years</u>	under 1	- 24
1		20
2		13
3		12
4		8
5		4

marital status m = 57 single = 23

spouse at BG: yes = 16
no = 46

if yes, FT = 13
PT = 3

yrs if full time

1	(3)
2	(2)
3	(1)
4	(1)
5	(1)
6	(1)
7	(1)
19	(2)

would use

Spouse 32

Underq = 14
FT = 4
PT = 10

Grad = 16
FT = 2
PT = 14

Children 5

Underq. 4
FT = 3
PT = 1

TUITION FEE WAIVER - DEPENDENTS
ADMINISTRATIVE STAFF POLICY
SURVEY OF STATE UNIVERSITIES IN OHIO
Addendum - December 9, 1985

	Eligible Staff	Waiting Period	Benefit	Courses Covered
Ohio State	F/T (defined as working 50% or more)	After 3 years service	50% of the dollar value of the undergrad instructional & general fees. Each individual is limited to 12 quarters or 200 hours of registration	Graduate & undergraduate (dollar benefit is always 50% of the undergrad instructional and general fee)

Alternate - Vacation Accrual

A maximum of forty days of vacation may be carried forward from the previous year. During the fiscal year accrued vacation may be allowed to exceed forty days; however, terminal payment is limited to forty days. At termination, the date authorized for a replacement will assume the incumbent has accumulated no more than forty days of terminal vacation.

(Change is underscored)

Elton Ringer
10/1/85

SENATE EXECUTIVE COMMITTEE

February 6, 1986
Minutes of the Meeting

Senate Conference Room
140 McFall Center

Members Present: Boren, Chiarelott, Corrigan, Ezell, Hebein, Muego, Newcomb, Stang, Ward, Wolfe, McGreevey

Members Absent: Anderson

Guest: Stoner

Chair Boren convened the meeting at 2:35 p.m.

TAX REFORM
RESOLUTION

Stoner, Chair of Faculty Welfare Committee, presented a resolution opposing changes in the tax law passed by the House of Representatives 12/17/85 (H.R. 3838) which contains legislation particularly detrimental to our profession. These include withdrawal of tax exemption for TIAA-CREF which would result in reduction of benefits to participants; a requirement that educational institutions conform to certain pension plan rules applicable to commercial and industrial firms that would impose costly administrative burdens to the institutions; changes relating to tax deferred annuities reducing the maximum contribution, restricting when and how annuity benefits can be withdrawn and imposing a severe tax penalty on certain case withdrawals. Also opposed was a proposed change in the three-year recovery rule related to withholding taxes on contributions to a pension plan if these already taxed contributions are withdrawn within three years.

FRINGE BENEFITS

Stoner reviewed six recommendations previously submitted and presented three additional ones. He indicated that some of these recommendations were drawn from a recent report of the ad hoc subcommittee on Fringe Benefits, chaired by Darwin Close. FWC recommendations on the other items in the Close report which relate directly to health care or insurance will be submitted later. The recommendations submitted follow:

- 1) That the required waiting period for receiving the benefit of waiver of instructional fees for student dependents of University employees be reduced from five years after date of employment to three years after the date of employment.
- 2) That restrictions be removed on the number of courses in which a faculty member may enroll during a given term without payment of fees.
- [Suggested changes in Charter language (B-II Sec. 4 C Fee Waiver Policy) which reflect these recommendations and also update the wording to be consistent with language submitted by Administrative Council and approved by the Board of Trustees relative to clarification of dependent and re-orders section related to benefits for widow/widower or child of a deceased faculty member were submitted.]
- 3) That a study be made to assess the human and financial cost of re-instating the early retirement program.
- 4) That a system of travel-cost advancements (or equivalent credit-card system) be instituted for faculty to finance travel costs that will be reimbursed through university budgets.
- 5a) That the number of spaces available for faculty parking near the center of the campus be expanded as quickly as possible.
- 5b) That no alterations in the assignment of reserved parking spaces be made without the approval of the Parking Committee
- 5c) That a study be made by the Parking Committee of the assignment

*dependent
tuition
waiver*

FRINGE BENEFITS
(cont.)

and utilization of reserved parking spaces by persons without health impairments

- 5d) That the charge to faculty members of replacing a lost, stolen or destroyed parking decal be the cost of manufacturing the decal
- 5e) That an option be allowed for either a parking sticker or the current parking card
- 5f) That the feasibility of providing a parking ramp for faculty employees be investigated quickly and seriously
- 6) That faculty be given discounts on usage fees at all University recreational facilities equal to or greater in percentage to the discounts provided at non-recreational facilities such as the University bookstore.

Additional recommendations submitted were as follows and resulted from the most recent meeting of FWC:

- 7) That faculty be given a ten percent discount on all cultural events (concerts, plays, etc.) at EGSU. [FWC assumes that the cost of this benefit will not come from the budget of any specific department such as the Theater Department.]
- 8) That the Computer Council explore a mechanism by which the University will subsidize 25% of the cost of a personal computer for faculty.
- 9) That the Office of the VPAA explore all possibilities for reciprocal agreements between EGSU and other universities which would allow faculty, their spouse and children to take courses at other universities at minimum cost.

BENEFITS FOR
RETIREES

Stoner also presented a revision to B-II, Section 3: Faculty Retirement which had been approved by Amendments and ByLaws Committee and which re-ordered the section to place benefits for retirees as the first topic and separates from the topic on Supplemental Retirement Program those options available for all retirees.

FACULTY WELFARE
COMMITTEE
REPORT

Stoner reported that the fringe benefits report is being presented in two parts at the request of Boren so that consideration can be given to some of the recommendations while waiting for the Insurance Committee report. A March deadline is expected to be met by the Faculty Welfare Committee.

Discussion of the FWC report included comments seeking assurance that the fee waiver provision would not restrict student registration. Attention was called to caveats incorporated in Charter language currently. Also clarification was given that intent of the revision was to allow faculty to take unlimited number of courses with reference made to need for such by faculty on leave or if such is desired during a summer session.

SEC comments re recommendations on parking made reference to report on number of location of reserved parking (Report submitted by Parking Services and summary of such were distributed at this SEC meeting.) supporting the need for the recommendation study of reserved spaces.

Stoner responded to inquiry re wording of recommendations for faculty, indicating that FWC is charged with consideration of faculty welfare and does not want to assume responsibilities charged to other committees monitoring welfare of other groups. He also called attention to fact that both administrative staff and classified staff have fixed work schedules while faculty have flexible schedules. He indicated that it seems irrational to claim that parking is a benefit for faculty, when it fact it isn't. He expressed view that faculty are discriminated against. He indicated FWC is not proposing separate types of parking but rather that there is not enough parking spaces.

SENATE EXECUTIVE COMMITTEE -- February 6, 1986 -- page 3

FACULTY WELFARE
COMMITTEE

Comments were made relating the Parking Services report on number of parking decals stolen and the recommendation to lower the cost of the fine for losing a decal. Stoner commented that perception of some is that the \$25 fine represents a slur and that the victim of theft should not be the one to be fined. An inquiry was made as to whether the decision to charge \$25 was made by the Parking Committee or by Parking Services with the implication that policy should be considered by the Parking Committee. A recommendation was made that if a decal is stolen that the number of that stolen decal could be removed from the computer listing and a list of such stolen numbers could be used when monitoring lots. The impact of a substantial fine was noted in altering care of the decal.

Reference also was made to omission of the previously submitted recommendation that faculty be given the option to having either a decal or a sticker. Stoner indicated intent had been to include all that were previously submitted. [Note: This recommendation has been inserted in recommendations listed (5a) for sake of clarity in the record of SEC action on recommendations.]

Professional
Liability
Insurance

Boren reported that an additional recommendation (not listed) had been submitted by FWC regarding professional liability insurance and that consideration of such is being delayed pending further investigation of existing coverage. Boren reported a bill passed by Ohio legislature in December which provides coverage and authorizes Attorney General to represent them.

UNIVERSITY
INSURANCE
COMMITTEE
REPORT

Stoner reported that a recent conversation with the chair of the University standing committee, Insurance, has informed him that the committee has decided to send their report directly to the President rather than to the Senate and that their report is similar to the Close report with the exception that they are recommending full and immediate coverage of family health care rather than phasing it in over three steps. Stoner indicated he did not receive a copy of the report and assumed they would not receive such. Boren indicated efforts would be made to secure a copy. Stoner indicated that he did not believe the action of the committee in not sending a copy of the report to Senate should preclude Senate from meeting the March deadline set by the FSBudget Committee.

FACULTY WELFARE
COMMITTEE

Discussion returned to the fringe benefits report with reference to the recommendation on reciprocal fee waivers with indication that other institutions do provide such, some allowing one-half payment and some private institutions allowing full payment. Reference was made to existing agreements with TU and MCO for faculty. Further clarification of the professional liability coverage was requested. Efforts will be made to secure a copy of the legislation.

Muego moved, Newcomb seconded, that the Tax Reform Resolution, the fringe benefits recommendations, the Charter revisions (B-II, Sec. 3 Faculty Retirement and B-II, Sec. 4 C Fee Waiver) be placed on the Senate agenda for February 13 with the endorsement of SEC. The motion carried.

GSS RESOLUTIONS

Tax Relief
Resolution

Boren reported that one of the resolutions distributed to SEC, the one dealing with housing, was not intended for Senate consideration and it was withdrawn from the discussion. The second resolution dealt with a request that the chief administrators of EGSU take measures to alleviate hardships created by recent federal tax developments re fee waivers and that a task force be created to study and devise measures to better the welfare of all graduate students.

GSS RESOLUTION Discussion focused on the need for the wording to be more positive and stronger, the need for changing the wording to reflect Senate action, and the type of action the President reported would be provided when he, Dr. Katzner, and Dr. Eakin talked to graduate students gathered for a meeting last Friday afternoon. It was reported that University counsel had indicated that only those graduate assistants who had signed contracts after January 1, 1986, would be affected and that provisions would be set up to help these individuals. Concern was expressed for the generality of the wording. It was suggested that if action already is being taken that perhaps the resolution should commend the administration.

Hebein moved, McGreevey seconded, that the resolution be placed on the agenda with SEC endorsement. The motion carried. Consideration was given to the possibility that GSS would introduce a substitute motion with revised wording and that the intent of this motion is to endorse the substance and the intent.

ByLaws A & K Amendments & ByLaws at the request of SEC submitted a revision to ByLaw A so as to insert a new #9 labeled ISSUES AND CONCERNS in the Order of Business of the Senate thus making #10 Adjournment.

The addition of the following new bylaw, ByLaw K also was recommended:
Items not on the agenda may be discussed under Issues and Concerns. A motion on such an item cannot be considered until a 2/3rds vote of the membership present approves a motion to so proceed.

The revision of ByLaw A brings the Order of Business of the Senate bylaw into line with current practice. The new bylaw addresses the matter of handling new items. The question of dealing with such proposals from the floor under New Business can be handled under Robert's Rules by a call for "The Orders of the Day."

Hebein moved that the revision of ByLaw A and the addition of ByLaw K be placed on the Senate agenda for February 18th with SEC endorsement. Ward seconded the motion which carried.

SEC/VPAA
JOINT CONFERENCE
AGENDA

Boren reviewed topics that have been submitted for consideration at the next SEC/VPAA Joint Conference to be held February 13th. He indicated that the Chair of Committee on Academic Affairs also would be present to discuss procedures for meeting their charge for setting academic priorities. Boren expressed hope that this conference could be viewed as a brainstorming of possible approaches to developing such priorities.

Other items on the agenda include the Faculty Development Center with a request for a status report, and Faculty Improvement Leaves. Boren reviewed prior action relative to a recommendation to extend payment for one-year leaves presented by Faculty Development and Faculty Welfare Committees. The need to get a copy of the recommendation and to follow up on concerns in this area were expressed.

McGreevey moved, Hebein seconded, that the agenda be approved. The motion carried.

An inquiry was made as to status of plans for the summer calendar. Boren indicated he would call Anderson to see if this topic could be reported on at the meeting also.

REQUEST FOR A
CHAPTER
INTERPRETATION

Boren reported that he had received a request for a Charter interpretation re the following questions:

- 1) What constitutes "interrupted" or "unfinished" term of office in the chairship of a department? (Article XI, Sec. 3 A-4)
- 2) The Charter reads "the selection process presumes close contact between the dean and the department." Please interpret the word "department." Does it mean all faculty or an elected group?

Boren indicated that President Olscamp has been informed of this request and an SEC/President Joint Conference on Charter Interpretation will be set up as soon as possible.

MINUTES OF
January 30, 1986
SEC/PRESIDENT
JOINT CONFERENCE
ON CHARTER
INTERPRETATION

Boren indicated he wanted to discuss procedures for handling the report of the conference and to allow SEC members an opportunity to review the minutes to determine if they expressed intent of the meeting.

Stang indicated that minutes of the meeting had been prepared to record context of the action and that a separate page had been prepared to indicate action taken with the hopes that if the action page was distributed on paper with holes punched, this page would be placed in Charters. Reports have been received indicating that pages distributed for previous Charter interpretations have not been placed in Charters. The importance of having a record of the context of the action was stressed.

Boren asked if minutes accurately reflect what transpired and if the wording reflects intent. He was concerned with the action item taken on the clarification of the word "absence" in that it appears that it was a Charter amendment. He stressed that the purpose of the joint conference is to interpret and that following such interpretation, Amendments & ByLaws Committee is to revise. Stang expressed concern re the action but in terms of the question being resolved (What is the meaning of "absence"?) not being the question asked by the initiator.

Muego, mover of the motion resulting in action taken, indicated that the intent was to interpret "absence" as being brief and requesting Amendments & ByLaws to formalize the interpretation so that in the future there will be no such conflicts arising from meaning of the term. He expressed view that wording accomplishes this.

Boren requested that any suggestions for revisions of the meeting be sent to the Secretary as soon as possible and that a copy will be sent to the President.

MINUTES OF
January 30, 1986
SEC MEETING

Boren asked to go on record clarifying a statement made during the discussion of Charter interpretation procedures. His reference to preferring to avoid them at all costs was intended to mean that other means of resolving the issue have been exhausted before taking the matter to an interpretation.

ISSUES AND
CONCERNS OF
SEC

With reference to a prior Charter interpretation regarding the role of a chair in tenure decision with respect to sending forward the department decision, Ezell asked SEC whether based on the interpretation given it would be proper procedure for the chair to forward with his rationale a vote contrary to that of the department without sending forth the rationale provided for the department's vote. Discussion by those present at the time of the interpretation focused on the need for the chair to report accurately and recollection that there would be a rationale provided for both the department and chair votes. Ezell commented that he thought this was the case also but that it did not appear in the Charter revision.

ISSUES AND
CONCEPTS OF
SEC

Ecell asked a second question re a previous Charter interpretation related to early tenure. In his explanation he also inquired whether an individual can request a Charter interpretation of an earlier interpretation given such has not been incorporated into the Charter. He commented that given a different group of people serving on SEC the interpretation might be different and if the interpretation had not been incorporated into the Charter, would a second interpretation be possible. Boren expressed view that a question could be asked and Chiarelott commented that SEC could always take the position that the question had been interpreted previously.

Ecell continued his inquiry with reference to the interpretation on early tenure. Discussion focused on revisions made last year re this section of the Charter. Current wording of the pertinent section was reviewed. Ecell expressed view that there remains significant problems within this area. Possible avenues of action were identified including a request for consideration of a Charter revision. Ward commented that with respect to a person in 6 of 7 years that there had been some contradiction to the general principle and these were supposed to have been changed. This area needs to be checked.

Views were expressed that the current wording is favorable for the probationer and that a possible intent of using this wording was to encourage the probationer to remain. Ecell clarified perception of this being a problem area by describing a situation whereby a request for early tenure is turned down on the basis of "not being professionally mature enough" with the view that there will be another opportunity to approve tenure. Such action could lead the probationer to view the situation negatively and seek other employment. He indicated that some have expressed view that it would be better if Charter language required full probationary period to be served to avoid such situations.

A suggestion was made that these individuals should submit a revision to the Charter to Amendments & ByLaws Committee. Muego suggested that it would be interesting to see what the general attitude of probationers would be to this issue. A contrast was made between such being done by a survey or merely by view of their response to a revision on the Senate floor.

Returning to the first question, Ecell was asked to read the Charter interpretation (1/17/85 and 1/24/85 on Part B-I, Sec. 4, p. 5). He indicated that the wording is such that it does not say specifically that the chair has to put in the letter of transmittal (of vote) why the vote was given. However, Ecell called attention to wording re the requirement of a two-thirds vote limits the influence of the Chair....The possible need for a Charter interpretation on this matter was raised as was the possibility of a request for an amendment. Also discussed was the role of the Dean in reversing a departmental decision. Boren suggested one avenue would be for clarification of basis for disagreements when such exists between department/chair/Dean. Besides a request for Charter interpretation or revision, the possibility of appealing to FPCC was raised.

Another concern raised related to consideration of discussing with the VPAA concerns expressed by faculty within a college and pattern of responses. The need for receiving documentation of concerns prior to an informal discussion was raised. Muego agreed to get this information.

CHAPTER REVISION At the January 21, 1986, Senate meeting the following motion was placed on the floor by Calderonello and seconded by Ebell:

Article IV,
Sec. 6 A
SEC

This Committee of 15 shall be composed of the chair, the Vice Chair, the Secretary, TEN FACULTY SENATORS AND TWO STUDENTS, ONE UNDERGRADUATE AND ONE GRADUATE. THE TEN FACULTY MEMBERS SHALL BE ELECTED BY AND FROM THE FACULTY SENATE. TWO EACH SHALL BE CHOSEN FROM AMONG THE FACULTY SENATORS REPRESENTING THE FOLLOWING COLLEGES: ARTS & SCIENCES, BUSINESS, AND EDUCATION & ALLIED PROFESSIONS. THE OTHER FACULTY MEMBERS WILL COME FROM THE REMAINING COLLEGES AND THE INSTRUCTIONAL SUPPORT AREA WITH NO MORE THAN ONE REPRESENTATIVE FROM EACH. THE UNDERGRADUATE STUDENT SHALL BE APPOINTED BY THE USG AND THE GRADUATE STUDENT BY GSS.

This motion was tabled until the February 18th Senate meeting and referred to Amendments & ByLaws Committee for appropriate wording.

Amendments & ByLaws Committee submitted two proposals in response to the referral of the Calderonello motion. Proposal A sets the size of SEC at 13 with 3 faculty members to be elected after the election of Senate officers. Election of faculty members is based on proportion of faculty in a college, 1 per 100. The ratio restriction does not apply to consideration of college of officer. Thus it would be possible for a combination of continuing SEC members and newly elected officers to lead to a ratio larger than one. [Election of the 3 based on proportion could result in all 3 being from the three larger colleges.] Proposal A also re-orders paragraphs 3 and 4 of the current wording and inserts the phrase "shall have the responsibility for the business of the Senate" in the current paragraph 4.

Proposal B sets the size of SEC at 16 with 11 faculty members to be chosen so that two each come from Arts & Sciences, Business and Education & Allied Professions. The remaining five come from the remaining colleges and Instructional Support Services, one each. This differs from the Calderonello motion in that the size is increased by one and this permits one each to be elected from the smaller colleges and Instructional Support Services rather than four elected from the five areas. Proposal B does not re-order the current paragraphs 3 and 4 nor adds the phrase indicated above.

The initial discussion of revision of this section had stemmed from a request to Amendments & ByLaws Committee to reword the Charter to clear up the inconsistency created when reconfiguration established a new college--current wording calls for six faculty members to be elected so that each of the degree-granting undergraduate colleges and the Graduate College are represented.

Discussion in SEC focused on the possible outcomes of election by proportional representation versus efforts to counter disenfranchisement of the smaller colleges.

|| Muego moved, Newcomb seconded, that Proposals A and B be placed on the floor of Senate with SEC endorsement of Proposal B.

|| Ward moved, Chiarelott seconded, to amend the motion by deleting the endorsement.

CHARTER REVISION Discussion focused on the extent to which Proposals A and B reflected the debate on the Senate floor with support for endorsement of B as being more in line with the debate. Muego also called attention to the fact that while the smaller colleges on campus may network this is not possible for Firelands as he spoke in support for a proposal that permits representation for the smaller colleges. Ward spoke to the importance of allowing Senate to view both proposals. Chiarelott commented that the Senate debate had included perception by some that the larger colleges needed more representation on SEC. Boren expressed concern regarding having two motions on the floor and which would have priority. Stang called attention to the fact that Senate action was to table the Calderonello motion until the February 18th meeting and to refer the motion to Amendments and ByLaws for proper wording. They did not do this. Rather they came up with two different proposals. The view that SEC has the responsibility of following through with SEC action on the Calderonello report was expressed with the comment that if another body wished to submit a substantive change by way of a substitute motion they could.

|| The question was called on the motion to amend by deleting endorsement of Proposal B. The motion to amend was defeated with two abstentions.

|| Muego then moved to amend his original motion to place Proposal B on the agenda with endorsement. The seconder, Newcomb, agreed. After further discussion contrasting Proposal B with the Calderonello motion, and whether or not both of Amendments & ByLaws Committee's proposals should be sent out with the agenda or distributed at the time of the meeting, as well as whether or not the Calderonello motion is the one which should be placed on the agenda, and also whether or not Amendments & ByLaws had exceeded their charge by submitting two proposals with substantive changes rather than rewording the motion submitted, and what the responsibilities of SEC are in this instance, Muego withdrew his motion. The seconder agreed in order to allow submission of the Calderonello motion.

|| Stang moved, Muego seconded, that SEC place on the February 18th Senate agenda the Calderonello motion calling for a committee of 15 with 10 faculty Senators. The motion carried.

|| Ward moved that in addition SEC send the report from Amendments & ByLaws Committee be included with the agenda with a cover letter explaining the reason for sending the report being that SEC thought Senators should have the information provided in the report and that SEC action was based on the motion approved at Senate. The motion carried with one abstention and one nay vote.

Further discussion focused on use of a roll call vote, possible Senate procedures re committee reports and discussion of new business and the possibility of returning to the existing wording should none of the proposals be approved. A concern with the relationship between Senate term and SEC term was identified.

Topics pending regarding Com/Com revisions were identified and plans made for getting the topics on appropriate agenda considered. Consideration was given as to when the Salary Market Adjustment Report would be considered. This matter was left to the officers of Senate.

The meeting adjourned at 4:35 p.m.

Respectfully submitted,
Genevieve Stang
Genevieve Stang
Secretary, Faculty Senate

Faculty Welfare Committee recommends that Senate endorse the following resolution.

TAX REFORM RESOLUTION

The Faculty Senate of Bowling Green State University goes on record as opposing the changes in tax law which impact upon the teaching profession and request that such notice be sent to President Reagan and appropriate legislators urging them, as our elected representatives, to support efforts to prevent these and future attempts to modify the tax law such that it will negatively impact upon teaching professionals.

"The Tax Reform Act of 1985" (H.R. 3338) which was passed by the House of Representatives on December 17, 1985 contains legislation that is particularly detrimental to our profession. Specifically:

1. The proposed withdraw of tax exemption accorded to TIAA-CREF for over 65 years. This loss of tax exemption will ultimately result in a reduction of benefits to the participants in this pension plan.
2. The proposed requirement that educational institutions conform to certain pension plan rules that are applicable to commercial and industrial firms. This will impose unnecessary and costly administrative burdens on these institutions. This is particularly distressing coming at a time when federal funds are being reduced for support of education.
3. The proposed changes in the tax law relating to tax deferred annuities. Reductions in the maximum contribution, restrictions on when and how annuity benefits can be withdrawn, and a severe tax penalty on certain cash withdrawals are of concern. Teaching is an underpaid profession both from the standpoint of salaries while employed and in terms of retirement entitlements. The use of tax deferred annuities allows faculty to reduce the tax bite while they are employed in order to supplement their substandard retirement benefits. The proposed changes in the tax law will seriously impact on supplemental retirement income for our faculty. Particularly hard hit will be the older faculty who have a minimal time before retirement in which to build an individualized retirement plan.
4. The proposed change in the three-year recovery rule. Presently taxes are not withheld on withdrawals of one's own contributions to a pension plan if these already taxed contributions are withdrawn within three years. The proposed change would require that tax be withheld from every pension check and in effect spread out the pensioners' withdraw of their already taxed contribution over their expected life. This change has very substantial implications to the retirement planning of the faculty. Those near retirement have built their retirement planning around having tax free pension withdraws for up to three years after they retire. This proposed change would very substantially reduce the after-tax pension withdraws for all of our faculty.

SUMMARY
RESERVED PARKING SPACES

<u>Designation</u>	<u>No. Spaces</u>	<u>No. People</u>
Executive Level	13	10
Medical	10	10
Residence Hall Staff	20	20
Unit Director Staff (Sorority/Fraternity)	26	26
Departmental	94	24 different units including 4 academic departments [includes 55 spaces for Alumni & Development]
	----- 163	

<u>Lot</u>	<u>Reservation Category</u>			
	<u>Executive</u>	<u>Medical</u>	<u>Residence/Unit Staff</u>	<u>Departmental</u>
A	5	2		2
B			1	
D			7	1
E	4		6	3
F		1	9	
G		6		7
H				1
K			4	
N			1	
R				1
S			3	
Y				1
2			9	
3			4	
14				6
17				1
Health Center				1
McFall	1	1		3
Rec. Center				12
TV				7

B-II SECTION 4: OTHER SUBSIDIZED BENEFITS

- A. Benefits in Brief
- B. Insurance Benefits
- C. Fee Waiver Policy

The policy governing these ~~staff~~ FACULTY benefits shall be as follows:

1. Employee

A full-time employee of the University, including an individual employed full time at the University but compensated by another agency (i.e., ROTC, research agency, etc.), one who has emeritus status, and one who has retired formally into STRS or PERS, may enroll in ~~three courses per academic year and one course per summer session~~ on either an audit or credit basis without payment of the instructional or general fees, if

- a. one's ~~administrator~~ DEPARTMENT CHAIR or area administrator certifies that the individual's enrollment will not interfere with the discharge of duties as a University employee;
- b. one's enrollment in the section of the subject is recommended by the appropriate academic Dean or area administrator and approved by the University's VPAA.
- c. one's enrollment will not prevent a regularly registered student from attending the class section;
- d. enrollment for the course occurs in the Office of Registration and Records.

A full-time academic employee is one who is appointed (including leave of absence for a minimum of two semesters of the same fiscal year and whose teaching assignments and/or other assignments are determined by appropriate authorities to constitute a full load.

A full-time nonacademic employee is one who works 40 hours a week on a regular schedule and is employed full time for a minimum of nine months a year--such eligibility to be determined by appropriate authorities.

~~Instructional, facility and general fees are waived for faculty and staff who have formally retired into STRS or PERS and who wish to take a course on a space available basis. In addition, undergraduate instructional fees are waived for dependents of retirees during the time the retiree is employed under provisions of the Supplemental Retirement Program.~~

The President of the University is authorized, effective as of September 1, 1976, to provide for the payment of the instructional fee under circumstances determined to be exceptional and appropriate.

2. Spouse/Child

The cohabitant spouse, and/or child or children of a full-time employee, including faculty, emeritus/RETIRED faculty, and Civil Service (or local equivalent of Civil Service), and employees of the Departments of Aerospace Studies and Military Science, who has completed ~~five~~ THREE years of full-time service at BGSU, may enroll without payment of the instructional fee either as a full-time or as a part-time student at the University, on the campus or at any off-campus branch or center, provided that (1) the individual is eligible to be considered a personal exemption under the provision of Section 151 of the Internal Revenue Code OR (2) IN THE CASE OF NATURAL OR ADOPTED CHILD WHO IS NOT CLAIMED BY THE EMPLOYEE FOR FEDERAL TAX PURPOSES UNDER IRS REGULATIONS, THAT THE EARNINGS OF CHILD ARE LESS THAN \$1,000 IN ANY CALENDAR YEAR AND THE EMPLOYEE-PARENT PROVIDES \$1,200 OR MORE OF SUPPORT IN ANY CALENDAR YEAR. AN EMPLOYEE IS REQUIRED TO CERTIFY IN A NOTARIZED STATEMENT THAT THE ELIGIBILITY CONDITIONS ARE MET UNDER PROVISION (2). The general fee and any other course fees or charges will be paid by the student.

3. Widow/Widower or Child of a Deceased Faculty or Staff Member

The widow/widower or child of a deceased full-time faculty or staff member who has completed ~~five~~ THREE years of full-time service at BGSU, may enroll without payment of the instructional fee whether as a full-time or a part-time student at the University on the campus or at an off-campus branch or center. The general ~~and-facility~~ and other course fees or charges will be paid by the student. This policy does not apply if the faculty or staff member's appointment was terminated for any reason other than by retirement, death, or sickness which led to death. The policy also does not apply to a child who is not eligible to be considered a dependent under the provision of Section 151 of the internal Revenue Code.

Appeals of the application of these procedures should be made to the President of the University.

4. Fee Waivers Agreement Between BGSU and UT

(Remains the same--merely re-numbered)

5. Fee Waivers Agreement Between BGSU and MCO

(Remains the same--merely re-numbered)

SECTION 3: FACULTY RETIREMENT

A. Benefits for Retirees

The following benefits are awarded faculty and staff upon formal retirement into the State Teachers' Retirement System or the Public Employees' Retirement System. These benefits are provided for retirees who have been full-time employees or continuing part-time employees.

1. A permanent ID card which designates the individual as retired faculty or staff;
2. the same library and computer privileges as current faculty;
3. The opportunity to audit or take a course without payment of the instructional facility or general fees, on a space available basis. In addition to this benefit, undergraduate instructional fee grants will be extended to dependents (as defined in the University's existing regulations on employee fee waivers) of those persons retiring during the 1980-81 academic year or thereafter;
4. the same discounts or charging privileges granted to current faculty and staff;
5. provide whenever possible appropriate office space and the requisite support services whenever a retired faculty or staff member is engaged in part-time instruction or other paid services;
6. the person's name placed on the mailing lists for At Bowling Green and Monitor;
7. when requested, the same ticket arrangements and prices for inter-collegiate sports events and musical and drama productions; and
8. when requested, continuing access to the recreational facilities of BGSU on the same basis as current faculty and staff.

B. Retirement Benefit Account Option

A retirement benefit account will be established by the University for each eligible retiree if the retiree chooses to place his or her current accrued vacation and/or sick leave benefit in such an account instead of receiving the funds as a cash payment at the time of retirement. The funds in the retirement account will be expended by the University at the direction of the faculty or administrative staff member to acquire a paid-up life insurance policy and/or a paid-up annuity. This option must be exercised at least 90 days prior to the date of official retirement.

C. Counseling Services Option

The Faculty Development Center will coordinate the counseling and advising services to faculty and administrative staff on pre-retirement and career change alternatives. Services will include information about procedures in applying for STRS/PERS benefits and an examination of available alternatives in paying benefits. Any faculty or administrative staff member may receive these services by scheduling appointments with the Director of the Faculty Development Center.

D. Supplemental Retirement Program for Faculty and Contract Staff

The University sponsors a supplemental retirement program for faculty and contract staff who retire before age seventy and also provides all faculty who retire certain benefits. These policies and benefits are listed below.

1. Eligibility

Faculty or administrative staff must meet the eligibility requirements for the State Teachers' Retirement System or the Public Employees' Retirement System, must be less than seventy years of age at the time of retirement, and must have completed at least ten years of full-time service at BGSU to be eligible to receive the supplemental retirement benefit options outlined below. Faculty or administrative staff who wish to exercise one or more of the options in the program must submit a letter of intent to the VPAA as indicated.

2. Post-Retirement Employment Option

Faculty or administrative staff who retire before the age of seventy are assured of limited employment at the University (one academic semester or equivalent per calendar year) on terms acceptable to BGSU and the retiree for a period of five consecutive years after retirement or until the age of seventy, whichever comes first. The employment contract must conform fully to applicable STRS/PERS regulations.

The adjusted salary of the faculty retiree whose last full-time contract was nine months will be one-fourth times the final contract for those who teach the full supplemental retirement teaching load during the summer session and one-third times the final contract for faculty who teach a full supplemental retirement load during the fall semester; the adjusted salary of the faculty or administrative staff retiree whose last full-time contract was twelve months will be one-fourth times the academic year conversion (nine-elevenths) of the final contract. Retirees choosing the Supplemental Retirement Option shall receive salary adjustments each year they work equal to the percentage of increment in the salary pool given to full-time contract employees. The increments are to be added to the salary earned during the final contract year of full employment. This provision shall be retroactive to the inception of the Supplemental Retirement Plan if possible.

Employment opportunities for faculty will be teaching and employment opportunities for administrative staff will be service, depending on the expertise of the individual and the needs of the University. However, it is expected that a faculty retiree will teach a full instructional load (at least 8 semester hours) for the summer session except that it may be for fall semester if directed by the VPAA. Administrative staff will provide service for fifty-nine working days per year as permitted by PERS and as determined by the area Vice President.

The retiree must select and agree to this option no later than December 1 during the final full-time contract year, effective with the 1981-82 academic year. The retiree must sign an annual contract and perform the services on an acceptable basis thereafter, as approved by the appropriate Dean or Vice President, in order to keep the employment option in force. Failure to sign the initial contract will indicate that the person does not wish to exercise this option; failure to sign subsequent contracts or failure to perform services at acceptable levels negates this option. The University is under no obligation to extend post-retirement employment to the retiree beyond the "five-year" or "age seventy" limits. Retirees selecting the Supplemental Retirement Option must indicate each year at the specified time their intent to teach the succeeding year; however, the individual shall be permitted a one year's leave of absence during the five years of guaranteed employment without jeopardizing future teaching eligibility (except during the last year of eligibility), provided the department approves.

3. Program Implementation

The supplemental retirement program will be coordinated through the Office of the VPAA. Implementation procedures will be announced by the VPAA following consultations with an advisory committee comprised of representatives of the faculty, administrative staff and Deans. An annual report of the program's operations (including costs, replacement policies, etc.) will be prepared by the VPAA and submitted to the Board of Trustees.

4. Tax Sheltered Annuity

Retirees selecting the Supplemental Retirement Option shall have the opportunity to continue payroll deductions to their Tax Sheltered Annuity plans during the part-time employment years with the University.

5. Term Life Insurance Option

Eligible retirees will have the option of continuing their term life insurance program on the same formula as current full-time faculty and administrative staff, i.e., two and one-half times the base salary adjusted for part-time employment. Retirees who agree to post-retirement employment with the University will pay the scheduled annual premium applicable to their new salaries for the life insurance coverage. This option must be exercised at least 90 days prior to the date of official retirement.



Tax Relief Resolution

WHEREAS, recent developments in federal tax law have created an unusually exigent set of circumstances for the budgetary needs of Graduate Assistants, Teaching Fellows, and others similarly situated, and

WHEREAS, said circumstances have an unduly harsh impact upon Ohio residents, and

WHEREAS, said circumstances create an even more intolerable situation for out-of-state graduate students, and

WHEREAS, such circumstances are counterproductive to graduate education, recruitment of graduate students, and otherwise undesirable,

THEREFORE BE IT RESOLVED, that the Graduate Student Senate of Bowling Green State University deems it necessary for chief administrators of this University to undertake timely measures to alleviate the hardships created by recent federal tax developments,

BE IT FURTHER RESOLVED, that a Presidential Task Force should be created by the President to study and devise appropriate measures to better the welfare of all graduate students.

ADMINISTRATIVE STAFF COUNCIL
PERSONNEL WELFARE COMMITTEE REPORT
TUITION FEE WAIVER-DEPENDENTS

During the Fall Semester, 1984, the Administrative Staff Council's Personnel Welfare Committee began to examine the University's policy on tuition fee waiver for dependents. With the assistance of the Office of Administrative Staff Services, thirteen state supported institutions in Ohio were contacted and asked to provide comparative data on the tuition fee waiver policy. The results of this survey are listed below.

FINDINGS: Bowling Green State University, with five years, has the longest waiting period for employees of any school canvassed.

No mandated waiting period:	Akron Cincinnati Kent Medical College Ohio University Wright State Youngstown
One-year waiting period:	Central State University of Toledo
Three-year waiting period:	Cleveland State Miami University Ohio State University
Five-year waiting period:	BGSU

The personnel Welfare Committee also conducted a survey, via questionnaire, to those administrative staff who have been employed less than five years (192). Eighty-two (42%) responded to the questionnaire. Twenty-four or 29% of the respondents indicated that they had been employed between three to five years. Nine respondents, of those employed between three and five years, indicated they would use this benefit for their spouse. Two respondents indicated they would use the benefit for their children. (See attached survey and corresponding results.)

RECOMMENDATIONS: The required waiting period for receiving the benefit of waiver of instructional fees for student dependents of university employees be reduced from five years after date of employment to three years after the date of employment.

RATIONALE: In addition to the direct benefit to recently employed administrative staff, there are indirect benefits, which include attraction and retention of higher quality employees, and increased recruitment of good students.

It is understood that the potential real cost to the university is the loss of instructional fees. Based upon the Administrative Staff survey, a number of dependents who would take courses would be graduate students; and thereby improve the enrollment ratio as directed in the University Role and Mission Statement. If University enrollment falls below the mandated ceiling, increased income is generated by these dependents through subsidy.

The results of the Administrative Staff Survey indicate that although a small number of Administrative Staff would use the fee waiver for their dependents, it would, nevertheless, be a significant benefit for them with minimum cost to the University.

This would make BGSU more competitive with other state supported institutions, more specifically, the University of Toledo.

ADMINISTRATIVE STAFF COUNCIL
DEPENDENT FEE WAIVER QUESTIONNAIRE-RESULTS

Responses:

Total	192
3-5 yrs experience	24

Marital Status:

Married	21
Single	3

Spouse employed at BGSU:

Yes	8
No	13
If yes, full-time	7

If available, would dependent use fee waiver:

Spouse	9
Undergraduate	4
Full-time	2
Part-time	2
Graduate	5
Full-time	0
Part-time	5
Children	2
Full-time	1
Part-time	1

November 5, 1985

Administrative Staff Council
Dependent Fee Waiver Questionnaire

The Personnel Welfare Committee of the Administrative Staff Council is reviewing the dependent tuition fee waiver policy. Please answer the following questions and return the questionnaire to Susan Darrow, University Honors Program, 231 Administration by November 25, 1985.

Name:

Department:

Marital Status: ☐ Single ☐ MarriedIs spouse employed at BGSU? ☐ Yes ☐ NoIf yes ☐ Full-time ☐ Part-time

If a dependent fee waiver had been available upon your employment at BGSU, how many dependents would have taken advantage of it this year? Please indicate number of dependents in each category. (You are limited to only one spouse.)

☐ Spouse☐ Undergraduate☐ Graduate☐ Full-time☐ Full-time☐ Part-time☐ Part-time☐ Children☐ Undergraduate☐ Graduate☐ Full-time☐ Full-time☐ Part-time☐ Part-time

FEE WAIVER POLICY (BGSU Trustees, 1976, Revised July 23, 1982, December 10, 1982).

The policy governing benefits for administrative staff members shall be as follows:

I. Full-Time Employee

- A. **Eligibility.** For the purposes of this policy, a full-time administrative staff member is one who works 40 hours a week on a regular schedule and is employed full-time for a minimum of nine months per year (including an individual employed full-time at the University but compensated by another agency such as ROTC or a granting agency).
- B. **Benefit.** Full-time employees may enroll in 15 credit hours ~~four courses~~ each year, not to exceed 3 credit hours ~~two courses~~ per academic term (semester),* on either an audit or credit basis, without payment of the tuition or general fees if:
 - 1. The employee initiates a request via a fee waiver form. These forms are available in local department offices, the Office of Human Resources (100 College Park Office Building)
 - 2. The employee's supervisor certifies that the employee's enrollment will not interfere with the discharge of duties as a University employee.**
 - 3. The employee's enrollment in the course is approved by the appropriate academic dean or area administrator who will then forward the fee waiver form to the Office of Human Resources for processing.
 - 4. The employee's enrollment will not prevent a regularly registered student from attending the class section.
 - 5. The employee enrolls for the course through the Office of Registration and Records.
- C. **Reciprocity.** An agreement exists between Bowling Green State University (BGSU) and the University of Toledo (UT) whereby full-time employees of one University may take courses, with a fee waiver, at the other University. This arrangement covers full-time employees only and does not include waivers for dependents. The following conditions apply:

1. The employee must be properly admitted as an undergraduate or graduate student at UT before registering for courses.
2. Fee waiver forms must be filed and approved. These forms are available in the Office of Personnel Services.

II. **Part-Time Employee**

- A. **Eligibility.** A part-time administrative staff member is one who works less than 40 hours per week on a regular schedule and whose contract indicates part-time status. Part-time administrative staff who have completed the equivalent of one full year of service at Bowling Green State University (2080 hours or twelve full months) are eligible for an employee fee waiver.
- B. **Benefit.** The fee waiver benefit is prorated according to the percentage of time an employee works. Staff with contracts of 75% - 99% are eligible for 12 credit hours ~~three courses~~ per year; staff with contracts of 50% - 75% are eligible for 8 credit hours ~~two courses~~ per year; staff with contracts of 25% - 49% are eligible for 4 credit hours ~~one course~~ per year.
 1. The fee waiver benefit allows part-time staff members to enroll in courses, not to exceed two per academic term, on either an audit or credit basis without payment of tuition or general fees according to the same restrictions noted for full-time staff.

III. **Spouse/Child of a Full-Time Administrative Staff Employee**

- A. **Eligibility.** The child, children and/or cohabitant spouse of a full-time administrative staff member who has completed three years of full-time service at Bowling Green State University is able to receive fee waiver benefits provided that:
 1. The individual to receive the fee waiver is eligible to be considered a personal exemption under the provision of Section 151 of the Internal Revenue Code.

2. In the case of a natural or adopted child who is not claimed by the employee for federal tax purposes under IRS regulations, the earnings of the child are less than \$1,000 in any calendar year and the employee-parent provides \$1,200 or more of support in any calendar year. An employee must certify in a notarized statement that the eligibility conditions are met under provision (2).
3. An employee must initiate a fee waiver form--available in the Office of Human Resources--to receive benefits for his or her spouse or child.

B. **Benefit.** The child or spouse of an employee may enroll as a full-time or part-time student without payment of tuition fees. The student may attend classes at the main campus or at any off-campus branch or center. The student will pay the general fee and other course fees or charges.

IV. **Widow/Widower or Child of a Deceased Administrative Staff Member**

A. **Eligibility.** The widow/widower or child of a deceased full-time administrative staff member (deceased while working at BGSU) is able to receive fee waiver benefits provided that:

- clarification

- 2.1. The widow/widower or child individual was eligible to be considered a personal exemption under provision of Section 151 of the Internal Revenue Code.
- 3.2. In the case of a natural or adopted child who was not claimed by the deceased employee for federal tax purposes, the earnings of the child are less than \$1,000 in any calendar year and the deceased employee-parent provided \$1,200 or more of support in any calendar year.
- 1.3. The deceased administrative staff member served at Bowling Green State University for three years or more in full-time status.
- ~~4. The deceased administrative staff member's appointment at Bowling Green State University was terminated by retirement, death or sickness which led to death, and for no other reason.~~
- 4.5. The spouse of a deceased administrative staff member has not relinquished status as widow/widower. However, if the spouse remarries, tuition fee waiver benefits will not apply.

- E. **Benefit.** The widow/widower or child of a deceased administrative staff member may enroll as a full-time or part-time student without payment of tuition fees. The student may attend classes at the main campus or at any branch campus or center. The student will pay the general fee and other course fees or charges.

V. Retired Administrative Staff Members

- A. **Eligibility.** A full-time administrative staff member who has formally retired into STRS or PEPS is able to receive fee waiver benefits.
- B. **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.~~

VI. Spouse/Child of a Full-Time Retired Administrative Staff Members

- A. **Eligibility.** The cohabitant spouse, child and or children of a full-time administrative staff member (who has completed 10 years of full-time service at Bowling Green State University) and were dependents of the full-time administrative staff member at the time of retirement, may enroll in classes without payment of tuition fees subject to Section 15D of the Internal Revenue Code.

*Fac. Enroll 10 yrs.
Spouse/Child Full
Time*

VII. Other

- A. **Appeals.** Appeals of the application of these procedures should be made to the President of Bowling Green State University. The President of the University is authorized effective Sept. 1, 1976, to provide for the payment of tuition fees under exceptional and appropriate circumstances.
- B. **Taxing of graduate fee waivers.** In accordance with Section 117 of the Internal Revenue Code (I.R.C.) the University is required to report as taxable compensation graduate level tuition reductions (fee waivers) made on behalf of an employee's spouse or other dependents. This reportable compensation results in additional taxes (Federal, State, City and School); it is not subject to state

retirement contributions. Graduate level fee waivers for employees are exempt from taxes under Section 127 of the I.R.C.

- C. For further information about fee waiver benefits, please contact the Office of Human Resources (100 College Park Office Building).
- D. University employees who have fee waiver benefits and are laid off from employment may continue to have tuition fee waiver benefits for themselves and their dependents in accordance with existing eligibility requirements, for the equivalent of one school year (maximum of two semesters and one summer term) following the effective date of layoff.

* An accounting of courses taken begins with the fall semester; (i.e., from fall semester through the following summer session of each year). Full-time administrative staff members may take a maximum of 15 credit hours ~~four courses~~, not to exceed two courses per academic term when working during the semester, with a waiver of fees. Part-time administrative staff members may take fewer than 15 credit hours ~~four courses~~ on a prorated basis during an academic year.

** In order to avoid interruptions on the job, administrative staff members should, whenever possible, register for classes which meet outside their regular work schedules. When this is not feasible, staff members may, with the approval of their supervisor, enroll for a class during the regular workday. All time taken from the regular workday to attend classes must be made up.

*9 month - 8 credit hrs while working
Then Summer can take all classes
during Summer*
