Meetings with Human Resources 1999-2000

Bowling Green State University. Administrative Staff Council

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Index: ___ Included  ___ Separate  X None

Notes

1. Colored Paper
2. Pencil
3. Colored Ink
4. Photocopies
5. Post-It Notes
Mary Beth Zachary, Claudia Clark and myself met with Rebecca Ferguson this morning to start our dialog about what we feel are our priorities for Human Resources for the coming year...

These are what we took to her...I ran these by the Etec Committee but didn't give very much time to respond so I qualified the list with Rebecca in an email prior to the meeting stating we may make some changes based on feedback from our constituents...

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" hirer 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 1908 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%. These things about merit we must address. One is the generating of unit level discussions setting "super" merit criteria. Two, feeling secure that HP 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 (mercur), we want to make sure HP knows we want a say in this discussion and framing for the BOT.)

3) Performance Evaluation (Follow-thru with survey and outcomes...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 - HP's page, linked to from our page. Who will update it?? We feel HP should but we are certainly prepared to help with this.)

5) Professional Development (Budget from HP...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 HP's accounting for their end of the year report. We see this as another duty of the Professional Development committee.)
Date: Tue, 06 Jul 1999 11:50:50 -0500
Reply-To: lopez@wbgu.bgsu.edu (Paul G. Lopez)
Sender: owner-asc-rps@listproc.bgsu.edu
From: lopez@wbgu.bgsu.edu (Paul G. Lopez)
To: ASC-RPS <arc-rps@listproc.bgsu.edu>
Subject: Update...
X-Gateway: FirstClass Gateway for SMTP/IMTP (Mac681) version 1.0.0

Please share this info with your constituents...

Mary Beth Schary, Claudis Clark and myself met with Rebecca Ferguson this morning to start our dialog about what we feel are our priorities for Human Resources for the coming year...

These are what we took to her...I ran these by the Exec Committee but didn't give very much time to respond so I qualified the list with Rebecca in an e-mail prior to the meeting stating we may make some changes based on feedback from our constituents...

After each numbered item is what we took from the meeting...

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 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.)

Becca says HF will be putting together a list of employees they feel need a market study done on (person affected by salary compression, inversion, persons at their cap). This list will go to the VPs for additions to the list. Once they have the list we will get a look at it. I guess at this point we may have an opportunity to ask for add's?? The study will take place and hopefully we will be able to fund the necessary changes to place our people correctly ($160,000 set aside for this) and move ahead with 100% merit being our driving force for progression.

2) Merit (The BOT have a merit document. We are operationizing 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 HF 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 HF knows we want a say in this discussion and framing for the BOT.)

Becca promised a note to all concerning the need to have unit level discussions to put together merit criteria (which would include merit-30 and "super" merit-above the 30). This will be seriously pushed by the Provost and Beccas at Cabinet meetings, etc. The Library's most recent plan will be available as a template for those looking to not reinvent the wheel. It was implied HF will shapard this thru to completion...getting criteria from all, forming relative conformity, holding units accountable when they award merit.

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

The committee (ASC, HF, IPFA) work moving along, supported by HF funding. There will be a survey coming out from the committee. Please take the time to fill it out and send it back. Looking ahead to probably outcome: "Process" good, "Tool" is not... Need to actualize the BOT clear message of merit tied to performance in supporting the Performance Evaluation "Process" and realizing a Performance Evaluation "Tool(s)".

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

Need to get the web, probably Fall...may have to get by the BOT. It will be at the HF site and we will link to it at our site. Update issue to be a collaborative process...one of
our committees (TED) and HR.

5) Professional Development (Budget from HP...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 HP's accounting for their end of the year report. We see this as another duty of the Professional Development committee.)

Bacca says the money is there and ours to use as we did this past year. Database a good idea and will be a responsibility of the new training position in HP. We will probably start it and hand it over to this person in HR.

Other...
HP has asked for us to give them some feedback on a new employee orientation to the University.
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.)

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Hi all...
I told Becca Ferguson she could have the first 20 minutes of our Exec meeting on the 27th. She will be presenting what they hope will be what the 'new' employee orientation will consist of. She's looking for feedback/blessings...whatever.

She has asked the Classified staff Exec to join us (they have three persons). See ya there... (Student Counseling Center, third floor Student Services, 11:45am, brown bag it).

Paul
BGSU NEW HIRE ORIENTATION

Presented to Administrative and Classified Staff Executive Committees - July 27, 1999

Drafted by: Darlene Whipple
Donna Wittwer
Proposed Bowling Green State University
1999-2000 Staff New Hire Orientation

In order to assist all new employees to become effective and successful, it is important to be able to communicate BGSU’s vision, mission, and core values. It is also important that information regarding employment practices such as payroll needs, benefits, policies, and job expectations are clearly communicated in order to develop a long-term, positive, and mutually beneficial working relationship.

Some of the recognized benefits of a new hire orientation program are:
- Lower turnover
- Improved employee morale
- Reduction of the new employee's anxiety
- Increased productivity
- Facilitation of learning
- Long-term, positive commitment to the university
- Lower recruiting and training costs

Potential Structure

Orientation should provide the new part-time or full-time classified or administrative staff employee with information about their role at BGSU. It should be motivating and informative while answering basic employment questions.

<table>
<thead>
<tr>
<th>Content of a Good Orientation</th>
<th>Justification</th>
<th>Structure</th>
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</thead>
<tbody>
<tr>
<td><strong>WELCOME FROM THE PRESIDENT AND WELCOME RECEPTION</strong></td>
<td>Letter, or video Welcome reception</td>
<td>First opportunity to make a good impression. Let the employee know they are a valuable resource. Confirm their selection. Establish a cohort group for the new hire. Video presentation. Letter from the President in the orientation packet. Welcome speech from senior management representative.</td>
</tr>
<tr>
<td><strong>CURRENT ORGANIZATIONAL STRUCTURE</strong></td>
<td>Organizational chart helps employees know how they fit into the overall structure. At a glance, the employee can see where their job fits in and what the working relationships are among their department and other</td>
<td>Included in the orientation packet is BGSU's overall and the department specific. The general orientation goes over BGSU and the department specific is reviewed with the new employee by the supervisor.</td>
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<td><strong>3. HISTORY OF BGSU</strong></td>
<td>The goal is to give the new hire a sense of identity with BGSU. Each new employee should have an understanding of the University's past accomplishments.</td>
<td>Background information, how was it founded, what are some of the highlights in BGSU's development. What is BGSU known for in the past and now? Video Slide presentation <strong>Needs to be a visual... We would like to see a video.</strong> Note: Make sure that Firelands and BGSU are included.</td>
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<td><strong>4. BGSU PHILOSOPHY</strong></td>
<td>This program needs to cover the philosophies that are valued by BGSU. The program needs to go over the University's culture and an overview of the unique values. This is the time to discuss how and why the culture exists in its current form.</td>
<td>Part of the video. Short presentation by HP Director or Presidential Cabinet member.</td>
</tr>
<tr>
<td><strong>5. MISSION AND CORE VALUES</strong></td>
<td>The intent of going over the mission and vision statement is to inform the new hires how you want to be perceived by the supportive public. It is also about getting the new hire to think about the future and how to bring BGSU forward.</td>
<td>Spell out on power point. Video clip of the President's speech on &quot;putting students first&quot; from the &quot;State of the University&quot; presentation in 1998. Video our University's present employees talking about how they put students first. Give them the core values in a</td>
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<td><strong>6. JOB STRUCTURE</strong></td>
<td>a.) Job Expectations &amp; Clarification&lt;br&gt;Provide job descriptions to identify what is expected from the new hire and how their duties contribute to the success of the department and BGSU.</td>
<td>nicely presented &quot;diploma&quot; folder with their orientation packet</td>
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<td></td>
<td>b.) Performance Evaluation Procedures&lt;br&gt;An employee needs to understand the performance evaluation process and the time period it will occur. Only the basic steps of the process will be included in the general orientation.</td>
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<td></td>
<td>c.) Policies and Procedures&lt;br&gt;Written policy information included in the handbooks, (classified and administrative) are on the web. Should we hand out or refer to the web address?</td>
<td>Verbal presentation of policies and procedures</td>
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<td></td>
<td>We would also need to include position posting, severe weather policy, and academic calendar.</td>
<td>procedures given at general orientation. This could be a breakout of administrative and classified staff. Videotape presentations could be produced for the public records and mandated government policies such as sexual harassment.</td>
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<tr>
<td>d.) Compensation</td>
<td>Covering such information as how often paid, pay periods, overtime pay, comp time, holidays, vacation time (cannot take for a year), paid and unpaid leave, sick time, maternity leave, audits, and re-evaluations.</td>
<td>Breakout sessions of classified and administrative and review specifics at general orientation. Supervisors asked to review their expectations at department specific.</td>
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<td>e.) General Working Guidelines</td>
<td>Would include parking stickers, BGNET account, keys to office, employee identification, library card, hour and time of work, break periods and lunch periods, probationary periods, grievance procedures (refer to handbook).</td>
<td>More specific to the department and should be included in the department check sheet. (Temporary parking ticket in letter sent to new hire from HR)</td>
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<td>7. COMPLETING NECESSARY PAPER WORK</td>
<td>There is certain paperwork that must be completed to work, get paid, and be provide benefits that the employee is eligible for. This includes benefits, beneficiary, and payroll important records information</td>
<td>Depending on the frequency of general orientation, the benefits component would be delivered in a general orientation by representatives of the HR Benefits Department on a rotation basis. This would be a breakout session for full-time only. Records information can be provided on the first day of hire and ask the employee to come to the HR department and complete all necessary paper work with a</td>
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<td>8. IMPORTANT TRAINING SESSIONS</td>
<td>The goal of on-going training is to contribute to the organization's overall goals, as well as to the employee's personal goals. Certain training programs are necessary to complete the required components of the orientation. Other training programs recommended for new employees within the first six months of hire include sexual harassment, customer service, safety, performance appraisal, public records, and supervisor training, if applicable. Dates of training will be identified during general orientation. Sign ups will be collected with confirmation sent to employee and supervisor.</td>
<td>representative from Records. Paperwork has to be completed within three days (I-9's, payroll information, etc). The Records Department is responsible for monitoring the employee's file, which includes performance appraisal, evaluations, letter of increases, and contracts. A Records representative could do a general orientation presentation covering these points.</td>
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<td>9. CAMPUS TOUR</td>
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<td>Further training justifications:</td>
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<td>The primary purpose of training at the beginning of an individual's employment is to bring up to a satisfactory level the knowledge and skills required for effective performance. As the individual continues on the job, training provides opportunities to acquire new knowledge and skills. As a result of the training, the individual may then be more effective on the job and may qualify for jobs at a higher level...succession planning.</td>
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<td>The sooner we know where things are and how they work, the sooner they are more comfortable and productive.</td>
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<td>10. ORIENTATION RECORD KEEPING AND EVALUATION</td>
<td>A database of attendance and department specific check sheets will be developed.</td>
<td>Yearly, a general orientation report will be issued to the Presidential Cabinet for revision and input. Feedback will be issued to constituent groups and Dean's Council for their recommendations.</td>
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<td>As part of the continuous improvement process, the Internal Training Coordinator will evaluate the general orientation process once a year for review and restructuring. Feedback from new hire participants,</td>
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<td>via immediate written evaluations, from department designated orientation coordinators via written evaluations, from supervisors written input and from either sources such as focus groups will assist in the continuous improvement.</td>
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</table>
Wellness Program...memo to Whipple (What's come of this??)

Mercer guidelines for years in position for 3rd quartile and max.?

(Note from executive committee meeting 10/18/99)

Current data run of Mid-point to minimum not acknowledging years of experience prior to BGSU employment.

"Mid-Point of range is the Market"??

If "mid-point is market" then after the range work done by Mercer we will have a "Market" mid-point and with a definition of "years in range expectations" (i.e., 4-6 years to first quartile & 7-10 years to Mid-point) will there be a need for 'like-job/like-institution' market study??

I can tell people the ranges are being looked at by Mercer...what can I tell them about how the people in those ranges are going to be looked at....and what can I tell them about the distribution of the $160,000??

"Market"....definition.

Other determining factors (other than salary compression and inversion) that will be used to determine "market" adjustments?

Why can we make "years of service" adjustments below the mid-point but not above it? (Donna to Sandy, "Don't even go there...")

Timeframe for giving some concrete information about how the $160,000 will be distributed.

Multi-year plan to accomplish the number one recommendation of the "Final Report from the Administrative Staff Compensation Working Group"...(page 4), "Appropriately placing administrative staff within pay grades, according to their years of service..."
Becca Meeting
11/16/99

Additional clarification requested:

"Market" = Mid-point of each range?

We would like, in writing, what you're working on for Administrative staff regarding the President's Compensation Plan.

What is the legitimacy of "years in position" "market" adjustments? Will it pass legal review?

What about persons nearing retirement?

What about appeals to years in position due to "bumps" to next range but bump includes over half% of previous job? To include time in previous position. Percentage of previous job in current job to qualify, TBD.

How about a visit to ASC meeting to answer questions directly? Next meeting December 2nd, then Jan 6th...

PWC proposals for distribution of current $160,000 and future "market" monies
FROM: Sandy Lagro, Joe Luthman

Request for Guidelines
While PWC contemplates (at least) three recommendations for using $160,000 to address those administrative salaries that are too low, we do need some overall guidelines to help in choosing which proposals to eliminate.

A) Is it absolutely out of the question to address salaries that are in the 3rd and 4th quartiles? Proposal 2 below would address all salaries, regardless of quartile.
Justification: Were a system in place 20+ years ago, these meritorious employees would have salaries much greater than current.
Assumption: This would primarily be used to address employees with 20+ years of service who, while in the 3rd quartile, are very near the midpoint.

B) Please take note of the VERI STRONG PREFERENCE below, to use yrs of service to the University, rather than years in position. This preference crosses ***ALL*** the other proposals, for the reason cited. This one was unanimously supported!

-----------------------------------------------------------------------------------
VERI STRONG PREFERENCE: Make adjustments to all positions based on years of service as administrative staff vs. years of service in current job, e.g. an employee who has 15 years of service as an administrative staff employee, but was reevaluated to a different pay grade 6 years ago. Does that employee get adjusted to appropriate placement for 15 years or for 6 years?

Justification: There is an employee who makes $52,445, is in pay grade 19 since 11/1/97 (2 years), started as an administrative employee on 6/4/90 (9 years). If we look at only years in current job, that employee would not be adjusted (since 2 years at grade 19 - the salary should be $52,774). If that employee would not have been moved to grade 19, but stayed at grade 13, that employee would get an adjustment of $1,616 for a total salary of $56,061. So the employee would have been better off to not have been reevaluated!

Problem: Individual position would need to be looked at to know if the employee has been doing grade level 19 work since 6/4/90, if yes then that person could get an
adjustment of $7,499 to be a midpoint in grade level 19 with 9 years of service. If
individual was not doing grade level 19 work until 11/1/97 then the employee should not
receive any adjustment, since they are at 1st quartile in grade level 19. (but the
employee still gets penalized for moving up to grade level 19)

1: Make a percentage adjustment to all targeted employees from minimum to midpoint,
since the $160,000 will not address a 100% adjustment.

-Justification: It gets those employees closer to where they should be.

-Problem: There is somewhat of an assumption here that the employees will
eventually get to 100% at some time, which may never happen due to lack of funds.
Also, it may address those employees who have been here the least amount of time and
penalizes those employees who are close to retirement or who have been here longer and
may create compression problems.

2: Make a percentage adjustment to all targeted employees from minimum to maximum -
using a percentile factor. (If this cannot be done for some reason, PWC would like to see it
in writing).

-Justification: Addresses all employees somewhat more fairly, since everyone is
getting closer to their correct placement and would not create compression problems.

-Problem: Still does not address fully the personnel closer to retirement and
evacuates the problem with the Dep of Labor with across the board percentage
inches. Make adjustments to positions below the midpoint who are not correctly placed
in their range based on years of service.

2: Address targeted employees on a descending order of number of years of service
and take the $160,000 as far as it will go - based on individual positions. This would be
either (1) 1st and 2nd quartiles; or (2) all quartiles, whichever is permissible.

-Justification: Addresses those employees with lower-than-should-be salaries who
have been here the longest, and have therefore given up the most dollars in salary. No
percentage needs to be calculated. Each salary addressed is done so in total - no leftover
work for the next year, for those employees.

Example: Year 1. $160,000 may only address employees with 20 or more years of
service to BGSU.
Year 2. $150,000 (for example) may now address employees with 16 or more
years of service.
Year 3. 10 or more years.... etc...

-Problem: While this may be morally justified, it may not pass legal muster?
PWC Resolution on Wellness

Confirm January 6th visit, what about a float of to be presented plan of distribution of $160,000??

(From previous two meetings)
Additional clarification requested:

"Market" = Mid-point of each range? No but...

We would like, in writing, what you're working from for Administrative staff regarding the President's Compensation Plan. What is the paradigm?

Email to us...which we could sent to listproc.

What is the legitimacy of "years in position" "market" adjustments? Will it pass legal review?

No but...

What about appeals to years in position due to "bumps" to next range but bump includes over half% of previous job? To include time in previous position?

No comment but we communicated.

PWC proposals for distribution of current $160,000 and future "market" monies

She'll take a look
Eileen  
(2/10/2000)

Agenda

*$160K "market adjustments" distribution timeline

*Wellness resolution (what's happening, heard it made it to cabinet)

*"Spirit of BG" award (Looking for funding to make this happen)

*Concern over compensation of individuals who are at their caps
Paul G. Lopez, 08:42 AM 3/17/200, Re: Breakfast with Becca

Date: Fri, 17 Mar 2000 08:42:19 -0500
Subject: Re: Breakfast with Becca
To: mchar@bgnet.bgsu.edu
From: Paul G. Lopez@wbgu.bgsu.edu (Paul G. Lopez)

--- MIMEdoc: Items by SMTP Server on MAIL02/SERV02/BGSU(Railsa 5.0.2b |December 16, 1999) at 03/17/2000 08:38:07 AM, Serializ by POB3 Server on MAIL04/SERV04/BGSU(Railsa 5.0.2b |December 16, 1999) at 03/17/2000 08:45:08 AM

mchar@bgnet.bgsu.edu writes:

> One of the things on our agenda with Becca should be the staff audit that
> HR is doing.
> > What exactly is happening and to what end? (what are they going to do with
> > the information?)
> > Are they just counting bodies?
> > What kind of time line?
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Becca Meeting
3/21/2000

$160K distribution? When/How? Linda (@Provost meeting Monday) and the President (@President's Panel yesterday) said to ask you.

Mercer review of the ranges, results? Linda said they were going to be in this week to start this process?

How will these results effect those at salary cap? I know, we need the results first but I remind you (and I know you don't need to be but I must) this is the key information we are looking for right now from these results.

Staff audit...
What exactly is happening and to what end?
What are you going to do with the information?
Are you just counting bodies?
What kind of time-line?

Paul G. Lopez
Production Manager
Tucker Center for Telecommunications
Bowling Green State University
Bowling Green, Ohio 43402
(419) 372-7027 - FAX (419) 372-7048
lopez@wbgu.bgsu.edu
Becca Meeting
3/21/2000

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“Staff audit”...
What exactly is happening and to what end?
What are you going to do with the information?
Are you just counting bodies?
What kind of time-line?
Minutes from Appeals Committee Meeting, April 7, 2000

The Committee, along with Becca, Donna, and myself, identified those who may have special situations and were not included on the list for receiving any additional compensation.

Criteria the committee identified as worthy of receiving additional money

- Years in Current Position

Years in current position cannot include these factors occurring during this period.

- Departmental Change
- Salary increase (beyond normal yearly pay raises and adjustments)
- Title Change
- Change from Classified to Administrative
- Interim to Permanent Status
- Hired into a New Position (i.e., interviewed and was the successful candidate)
- Hire Date to the Institution has to be January 1, 1991 or before
- Must have a Job Analysis Questionnaire for the Current Position

Everyone should receive a letter if they were hired on or prior to January 1, 1995

It was decided that individuals would have thirty days to appeal the decision

Appeals Process

Individuals would have to come and pick up an appeals packet from the Office of Human Resources. Human Resources will monitor how many people and who came in for them

Included in the Packet

- Overview of the Plan
- Instructions
- Process

- Form to Appeal
- Deadlines
- Copy of the Criteria
Appeals Committee

- Need a copy of the Appeals Packet
- Need a form for resolution documenting their findings
- Can ask the Office of Human Resources for more information if needed
- Human Resources will process a Criteria sheet for each appeal
- Appeals will be done on an anonymous basis

Action Plan for getting listed individuals their adjustments

- Human Resources to talk to Payroll about deadlines and how to provide the additional monies to the listed individuals
- Human Resources to talk to Paul and Mary Bath about putting plan on the Administrative Staff Council web page.
- Human Resources to write plan, finalize letter, finalize appeals criteria and draw up a written action plan.

Reminders

Next Meeting, Thurs. Morning 10:00 A.M., Office of Human Resources
Becca Meeting
4/18/2000

- $160K distribution? Official (Linda Hamilton sent me email the day
several persons I know received letters talking about addendums to
their contracts but I've heard nothing from the "official" ranks)??
Details of distribution (9+ years moved to the mid-point of their
respective range?? What is the "snapshot date??")

- Mercer review of the ranges, anything? How does it impact those at
cap? Will there be a cap this year? If so, how will those at the cap
be compensated for Merit they've earned in the last year? Can we
have a list of those that will be at cap?

- Compensation plan year two, year three? In writing, the specifics?

- Salary inversion/compression issues. Process of identifying and
dealing with them?

- Teach compensation (issues of admin)

- Wilkins

HelpsHP \

Cup data

Who's not in class
GUIDELINES FOR USE OF LETTER OF APPOINTMENT

Individual hired on a Letter of Appointment must be in assignments that satisfy the following:

- Assignments are defined as "employee" (according to the "Definitions of Employee and Consultant") but do not relate to faculty, administrative staff, classified staff, or student status.
- Individuals work on special projects for a limited period of time, but in no case longer than one year.

The following procedures should be used in issuing a Letter of Appointment:

1. A job description should be developed. Neither the job description nor the job title should correspond to faculty, administrative staff, classified, or student positions.

2. The Contracting Officer for the area determines if the requirements for a Letter of Appointment are met. The Affirmative Action Office and Human Resources may be consulted in making this determination. Departments in the Academic area should notify the Academic Area Budgets Office.

3. It is not necessary to advertise or publicly recruit for the position. Individuals may be identified by the hiring department of all Letters of Appointment.

4. The rate of pay may be an hourly or monthly rate, or a total amount for a short term project. The period of employment should be the inclusive dates of employment. The schedule should specify the exact dates of service, and, when appropriate, the number of hours/days per week or the total hours/days of service.

5. The Letter of Appointment specifies if the individual will be compensated on a bi-weekly or monthly basis.
   a. Bi-weekly - if the individual is to be paid an hourly rate of pay, hours are turned in to Payroll on time sheets.
   b. Monthly - if the individual is to be paid a per-determined amount per month for the completion of a project, a payroll authorization must be processed for Payroll either on a monthly basis or reflecting the terms of the duration of the appointment.

6. Once the Letter of Appointment is completed and signed by appointee, initiator, and contracting officer, the copies should be distributed as follows:
   a. White copy - to Human Resources (for review and notification of appropriate departments)
   b. Yellow copy - to Appointee
   c. Pink copy - to Contracting Officer
   d. Gold copy - to Initiator

7. Appointee will be identified with an object code different from faculty, administrative staff, classified staff, or students. Payments for Letters of Appointee are charged to the Operating Budget designated on the Letter.

8. Appointees will be given an orientation in Human Resources to place them on the payroll and explain benefits and conditions of employment.
BOWLING GREEN STATE UNIVERSITY
LETTER OF APPOINTMENT
(NON-STUDENT ASSIGNMENTS)
FOR

______________________________________ ("Appointee")

It gives us great pleasure to offer you an appointment as ____________________________ in the department
of ____________________________ at Bowling Green State University ("University"). A description of your
duties and responsibilities is attached. It is understood that you will render temporary service during your period of
employment under this agreement, and that the University shall compensate you for such services at the rate of
________________________________ per _____________________________. Your period of employment will be

________________________________. Your schedule will be _____________________________.

You will be paid on a ( ) bi-weekly, ( ) monthly basis. Deductions will be made from your compensation for federal, state
and local taxes and Medicare contributions. Unless you are eligible to be exempt from membership in the retirement system,
deductions will also be made from your compensation to cover PERS/STRS contributions.

Appointees are considered temporary employees of the University and shall adhere to all University policies and procedures
relating to employment. The University shall have the right to terminate the service of the appointee at any time during the
appointment period for any reason including, but not limited to for cause, unsatisfactory performance, lack of funds, reorga-
nization, or elimination of the position. Compensation under this appointment shall continue through the termination date or
last date the appointee worked. The University will provide the appointee with Worker's Compensation coverage and, unless
exempt from membership in the retirement system, PERS/STRS benefits. One parking decal will be provided.

This agreement and the services rendered hereunder are subject to the provisions of the Constitution and the Revised Code
of Ohio and of the official regulations of the Board of Trustees of the University. Any specific provision found to be contrary
to the Constitution or Laws of the State of Ohio is to be considered void without invalidating other provisions of this
appointment. This agreement may be terminated by either party at any time upon notice by one party to the other.

Please return the signed Letter of Appointment to __________________________________________

no later than _________________.

Signature of Appointee

__________________________________________

BGSU ID#

__________________________________________

Date

__________________________________________

Budget/Cost

__________________________________________

White - Administrative Staff Personnel Copy
Pink - Contracting Officer Copy

Yellow - Appointee Copy
Gold - Initiator Copy
Hi Group:
Again - thank you to all of you for agreeing to work on this issue. Having
now heard from the majority of the group I have set our first meeting date
for Wednesday, May 30 at 9:30 a.m. in Class Room 1 of College Park.

Please bring your calendars so we can set future meeting dates.

The agenda for the first meeting will be:
1) Introductions
2) Review the Committee Charge
3) FMLA a Historical Perspective
4) Develop a time line/set dates for future meetings

I look forward to seeing all of you on May 30th call or e-mail me if you
have any questions. Becca
Rebecca Ferguson
Assistant Vice President for Human Resources
100 College Park
Bowling Green State University
Bowling Green, Ohio 43403
1.011.419.372.2259 (office)
1.011.419.372.2920 (fax)

The Office of Human Resources - Working as a team within the office and
throughout the University. Recruits the Best, Retains the Best, and assists
employees as they Reinvest in their future.
HR, Becca - 6/27/00

Can one request a market review of a position on an individual?

How will we work the range evaluation this year?

What help will you need on the CUPA/Mid level cupa data collection? With whom will the committee work? What expressed goal/s do you have for the identification of market?

[Handwritten notes and diagrams]

5-9 will be taken care

July -

Letter is not in July

in August def. to structure to Guac

ITS positions

No ITS no development

TIP - functional area - positions that are classified by the market shift from range
<table>
<thead>
<tr>
<th>Hiring Period</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions with Internal Applicants</th>
<th>Total Number Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
</tr>
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<tr>
<td>7/1/97 to 6/30/98</td>
<td>35</td>
<td>10</td>
<td>5</td>
<td>50%</td>
</tr>
<tr>
<td>7/1/98 to 6/30/99</td>
<td>51</td>
<td>9</td>
<td>6</td>
<td>78%</td>
</tr>
<tr>
<td>7/1/99 to 6/30/00</td>
<td>63</td>
<td>12</td>
<td>8</td>
<td>67%</td>
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</tbody>
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<th>Hiring Period</th>
<th>Total Number of Positions Filled</th>
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<th>% Filled by Internal Applicants</th>
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<tr>
<td>7/1/98 to 6/30/99</td>
<td>96</td>
<td>79</td>
<td>52</td>
<td>66%</td>
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<tr>
<td>7/1/99 to 6/30/00</td>
<td>123</td>
<td>113</td>
<td>82</td>
<td>73%</td>
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<tr>
<td>7/1/99 to 6/30/00</td>
<td>52</td>
<td>25</td>
<td>16</td>
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<th>% Filled by Internal Applicants</th>
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<tbody>
<tr>
<td>7/1/97 to 6/30/98</td>
<td>107</td>
<td>78</td>
<td>44</td>
<td>56.41%</td>
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<tr>
<td>7/1/98 to 6/30/99</td>
<td>147</td>
<td>88</td>
<td>58</td>
<td>65.81%</td>
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<td>Date Range</td>
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<td>Passed</td>
<td>Failed</td>
<td>Pass Rate</td>
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<tr>
<td>7/1/99 to 6/30/00</td>
<td>238</td>
<td>150</td>
<td>106</td>
<td>70.67%</td>
</tr>
</tbody>
</table>
Subject: Percentage of internal hires
To: jclark@bgnst.bgsu.edu, marylyn@bgnst.bgsu.edu, mzachary@bgnst.bgsu.edu, mwillie@bgnet.bgsu.edu, lrosebr@bgnet.bgsu.edu, atracy@bgnet.bgsu.edu
Cc: Rebecca C. Ferguson
From: fergusb@bgnet.bgsu.edu

Hi gang:
A couple of years ago we had conversations with CSC and ASC regarding numbers of positions filled with internal candidates. Attached you will find the report that we now generate every year for the Leadership Teams. The report continues to show when we have internal candidates for positions in all categories (Administrative, Classified - Full-time and part-time) greater than 50% of the time the internal candidate is selected for the position.

Also, you will notice an increase in total numbers of positions we have filled from last year to this year. Over the next few years we anticipate this number will continue to be high or rise. As you all know our employee populations (especially in the classified staff ranks) are within the retirement window over the past two and the next three - five years.

If you have any questions about the attachment, please let me know. Thanks Becca (see attached files: Positions filled Totals & Percentages.xls)

Rebecca C. Ferguson
Assistant Vice President for Human Resources
Bowling Green State University
Office: (419) 372-2259
Fax (419) 372-2920

"The Office of Human Resources - Working as a team within the office and throughout the University - Recruits the Best, Retains the Best, and assists employees as they reinvest in their future."

Attachment Converted: "C:\audora\attach\Positions filled Totals & Percentages.xls"
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<table>
<thead>
<tr>
<th>Administrative Staff Hires</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Period</td>
<td>7/1/97 to 6/30/98</td>
<td>56</td>
<td>10</td>
<td>5</td>
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<tr>
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<td>7/1/98 to 6/30/99</td>
<td>51</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>7/1/99 to 6/30/00</td>
<td>63</td>
<td>12</td>
<td>8</td>
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</tbody>
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<tr>
<th>Classified Staff Hires</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
</tr>
</thead>
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<td>71</td>
<td>68</td>
<td>39</td>
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<tr>
<td></td>
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<td>73</td>
<td>52</td>
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<td>7/1/99 to 6/30/00</td>
<td>123</td>
<td>113</td>
<td>82</td>
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<tr>
<th>Part Time Classified Staff Hires</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
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<tbody>
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<td>52</td>
<td>25</td>
<td>16</td>
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<table>
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<tr>
<th>Total Positions Filled all Types</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
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<tbody>
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<td>44</td>
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<td></td>
<td>7/1/99 to 6/30/00</td>
<td>238</td>
<td>150</td>
<td>106</td>
</tr>
</tbody>
</table>


Rebecca Ferguson, 02:03 PM 4/23/2001, Re: Employment Follow up

X-Sender: ferguson@mailstore.bgsu.edu
X-Mailer: QUITCOMM Windows Eudora Version 4.3.2
Date: Mon, 23 Apr 2001 14:03:26 -0600
To: "Mary E. Zachary" <mzachar@bgnet.bgsu.edu>
From: Rebecca Ferguson <fergusab@bgnet.bgsu.edu>
Subject: Re: Employment Follow up
CC: jclark2@bgnet.bgsu.edu

MBZ:
I understand what you are saying - let me see if this approach helps. You are stopped where you are in the process, for example:
1) If the position has not been advertised - advertisement may not occur without VP recommendation and Presidential Approval.
2) If the position has been advertised but interviews are not scheduled - interviews may not occur without VP recommendation and Presidential Approval.
3) If interviews have been scheduled or are in process you may continue the interviews but may not extend an offer without VP recommendation and Presidential Approval.

So depending on where you are in the process the hiring department would be writing a memo of justification to go up through the chain of command to the VP for recommendation to the President for approval. If you are pre-stage one or at stage one you would be seeking approval to advertise, interview and offer.

Our office is also concerned about the positions in process - especially those that are just closed or interviewing. We have supplied a list of open positions to all of the VPs and we are having conversations to assist in the communication to candidates in open positions.

For individuals with open positions I would recommend they communicate with their chair, dean, director, or VP to see what decision is being made regarding their positions.

Does this answer your questions? If not please let me know and I will try again. Becca
At 10:27 AM 4/23/2001 -0600, Mary E. Zachary wrote:
>Becca,
>>I'm sure you're swash in questions ad phone calls about Friday's announcement of a hiring freeze. I wonder if we could have a follow up statement with a tad more detail about searches in progress. For instance,
>>Could we know at what point in a search we are stopping? If folks have submitted applications, are we continuing with the process up to identifying a candidate and then telling them we're at a freeze? or will we let current applicants know what's happening?
>>I know this is a toughy of sorts but we actually could lose individuals because they're waiting without hearing...even internal candidates could need to have information.
>>Thanks,
>>MBZ
>>*****************************************************************************
>>Mary Beth Zachary
>>Head, Access Service
>>Wm. T. Jerome Library
>>Telephone (419)372-2054
>>Fax (419)372-6877
>>mzachar@bgnet.bgsu.edu

Rebecca C. Ferguson
Assistant Vice President for Human Resources
100 College Park
Bowling Green State University
Bowling Green, Ohio 43403
1.011.419.372.2259 (office)
1.011.419.372.2920 (fax)

The Office of Human Resources - Working as a team within the office and throughout the University, Recruits the Best, Retains the Best, and assists

Printed for "Mary E. Zachary" <mzachar@bgnet.bgsu.edu>
HR/Becca 10/31/00

Soft talks do we?
Where are we in the process for year 3?

Any non-renewals this year? Die.

Advertising positions that are grant-funded – how do you know? How do applicants know?

Letting individuals know about vacation use during their first-year? (Once it shows up for classified... admin?)

President’s Panel (JC and MBZ update)

P-T
informal Seminars -
Clean-up longer term / simplicity, simplicity, simplicity issue.

devisions -
better +

Mid-year personnel -
90% done.

Current 97g/98 budget costs.

Total year's personnel
FREQUENCY OF NEW HIRES
1997-98 and 1998-99

<table>
<thead>
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<th>Month</th>
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<td>19</td>
</tr>
<tr>
<td>September</td>
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<td>3</td>
</tr>
<tr>
<td>October</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>November</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>December</td>
<td>0</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>87</strong></td>
<td><strong>116</strong></td>
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</table>

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

<table>
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<tr>
<th>Year</th>
<th>1997-98</th>
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<th>1999-00</th>
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<tbody>
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<td>December</td>
<td>20</td>
<td>31</td>
<td>February</td>
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<tr>
<td>January</td>
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<td>11</td>
<td>June</td>
</tr>
<tr>
<td>April</td>
<td>9</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>21</td>
<td>27</td>
<td>August</td>
</tr>
<tr>
<td>June</td>
<td>26</td>
<td>27</td>
<td>November</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>87</strong></td>
<td><strong>116</strong></td>
<td></td>
</tr>
</tbody>
</table>
Driver Insurability Policy Statement

Bowling Green State University requires that all employees who operate state vehicles be insurable by the University’s insurance provider. The purpose of the policy is to reduce the exposure and liability of the University to high-risk drivers and provide a safe working environment for the students, faculty, staff and visitors.

University employees and off-campus applicants who apply for a position that will require driving a state vehicle must sign a ‘Motor Vehicle Record Statement’ authorizing a University official to request a driver record check. The record check will be repeated yearly as long as the employee is in a position that requires operation of a state vehicle.

An employee may be transferred, suspended, demoted or dismissed if he or she loses insurability due to a poor driving record. Loss of insurability may result from violations in the last 3 years that consist of any combination of accidents and moving violations which total 6 or more points. Point assignment is determined by the Office of Risk Management and can be viewed at their website: www.bgsu.edu/offices/risk/mgmt.

Reduction of 3 points may be granted for successful completion of the University’s defensive driving training course. This reduction does not apply to new hires.
<table>
<thead>
<tr>
<th>Hiring Period</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions with Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/97 to 6/30/98</td>
<td>36</td>
<td>10</td>
<td>5</td>
<td>50%</td>
</tr>
<tr>
<td>7/1/98 to 6/30/99</td>
<td>51</td>
<td>9</td>
<td>6</td>
<td>78%</td>
</tr>
<tr>
<td>7/1/99 to 8/18/99</td>
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<td>1</td>
<td>100%</td>
</tr>
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</table>

<table>
<thead>
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<th>Hiring Period</th>
<th>Total Number of Positions Filled</th>
<th>Total Number of Positions with Internal Applicants</th>
<th>Total Number of Positions Filled by Internal Applicants</th>
<th>% Filled by Internal Applicants</th>
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</thead>
<tbody>
<tr>
<td>7/1/97 to 6/30/98</td>
<td>71</td>
<td>63</td>
<td>39</td>
<td>57%</td>
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<tr>
<td>7/1/98 to 6/30/99</td>
<td>96</td>
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<tr>
<td>7/1/99 to 8/10/99</td>
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<td>13</td>
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### ADMINISTRATIVE STAFF HIRED 7/1/97 TO 6/30/98

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<tr>
<th>F/T POS</th>
<th>P/T POS</th>
<th>A/FT</th>
<th>A/PT</th>
<th>GFFT</th>
<th>GFPT</th>
<th>INT APPS</th>
<th>EXT APPS</th>
<th>FILLED INT</th>
<th>FILLED EXT</th>
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### ADMINISTRATIVE STAFF HIRED 7/1/98 TO 6/30/99

<table>
<thead>
<tr>
<th>F/T POS</th>
<th>P/T POS</th>
<th>A/FT</th>
<th>A/PT</th>
<th>GFFT</th>
<th>GFPT</th>
<th>INT APPS</th>
<th>EXT APPS</th>
<th>FILLED INT</th>
<th>FILLED EXT</th>
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### ADMINISTRATIVE STAFF HIRED 7/1/99 TO DATE

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<th>A/FT</th>
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<th>GFFT</th>
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<th>INT APPS</th>
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<th>FILLED EXT</th>
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<td>Percentage Hired Internally</td>
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<td>7/1/98 TO 6/30/99</td>
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<td>66%</td>
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<td>7/1/99 TO DATE</td>
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<td>78%</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
To: Rebecca Ferguson <fergusb@bgnet.bgsu.edu>
From: Mary Beth Zachary <mzachar@bgnet.bgsu.edu>
Subject: Re: Enrollment Form

Rebecca Ferguson, 09:25 AM 10/24/01 -0700, Re: Enrollment Form

Thanks for answering in such a timely fashion.

I guess that the phrase has been in effect since 1994 doesn’t alter my concerns. I think we haven’t had to re-enroll if there were not any changes to our health care dependents, etc. Could this be why the issue hasn’t been raised? It’s my understanding that everyone must now sign this form. Perhaps we need a better understanding of who that “other person” might be and why “without limitation” is a necessary component of this statement. I don’t think I want anyone’s notes, transcripts of sessions with a counselor, general notes about a conversation with my doctor or summaries not related to any medical care being entered into a database. Yes, certainly diagnosis, and treatment provided for payment purposes, however, the phrase still gives me great concern whether anyone has raised the concern or not.

(If anyone wants to opt out of this conversation say so and I’ll delete names. mbz)

MBZ

At 09:04 AM 10/24/01 -0400, Rebecca Ferguson wrote:

Mary Beth:

The sentence you have highlighted has been on our medical enrollment form since 1994. It is a necessary sentence to allow the processing and payment of claims. We did modify the form slightly to reflect our status as a self-funded plan. We thought the old statement emphasized MDU as the Plan Sponsor and Administrator and not BGSU. With language such as: “applying to MDU for coverage.” The old paragraph on the old form read:

“I hereby apply to Medical Mutual of Ohio (MMO) for the coverage indicated above. I authorize my employer/organization to deduct from my pay and remit any required contribution for the cost of said coverage. I authorize any medical professional, hospital, clinic, or other medical or medically related facility, government agency, or other persons to provide to MMO information including copies of records concerning advice, care or treatment provided to me and/or my dependents including, with out limitation, information relating to mental illness or use of drugs or alcohol. I understand that the kind of coverage for which I am taking application contains coordination of benefits, workers’ compensation, and subrogation provisions and acknowledge MMO’s right to enforce these provisions. I have read the above statements and represent that the information provided is true complete to the best of my knowledge. I understand that the provisions of false information on this application may result in termination of my benefits and my subject me to legal action by MMO. I understand I must notify MMO within 30 days of occurrence of any changes in statutes.”

As you can see the sentence in question has not changed. Again, this sentence is necessary to allow the processing and payment of claims. I have bolded what has changed:


Printed for Mary Beth Zachary <mzachar@bgnet.bgsu.edu>
Rebecca Ferguson, 09:25 AM 10/24/01 -0700, Re: Enrollment Form

"I certify the above completed information is true and correct to the best of my knowledge and understand that any misstatement constitutes fraud and may result in termination of my benefits and may subject me to legal action by MM and BGSU. I authorize BGSU to deduct from my pay any required contribution for said coverage. I authorize any medical professional, hospital, clinic, or other medical or medically related facility, government agency or other person to provide MM information including copies of records concerning advice, care or treatment provided to me and/or my dependent including, without limitation, information relating to mental illness or use of drugs or alcohol. I understand that this health care coverage I am enrolling in contains coordination of benefits, workers' compensation and subrogation provisions and acknowledge MM's right to enforce these provisions. Any employee who receives money from the Health Care Plan to which he or she is not entitled will be required to fully reimburse the Plan. I also understand that I must notify BGSU within 31 days of occurrence of any changes in status."

I hope this e-mail will calm your concerns. Thanks Becca

At 05:23 PM 10/23/01 -0700, MaryBeth Zachary wrote:

Becca, et al.

At Executive Committee today, we had our first look at the BGSU HealthCare (sic) Enrollment and Change Form. I have significant and grave concerns about portions of the release statement directly above the individual employee signature as do the members of the ASC Executive Committee.

Understanding the shortened time line for the enrollment process, I am including representatives of the constituent groups to speed communication.

For those who have not seen the statement I will include the statement in its entirety with the questionable portion in bold.

"I certify the above completed information is true and correct to the best of my knowledge and understand that any misstatement constitutes fraud and may result in termination of my benefits and may subject me to legal action by MM and BGSU. I authorize BGSU to deduct from my pay any required contribution for said coverage. I authorize any medical professional, hospital, clinic, or other medical or medically related facility, government agency or other person to provide MM information including copies of records concerning advice, care or treatment provided to me and/or my dependent including, without limitation, information relating to mental illness or use of drugs or alcohol. I understand that this health care coverage I am enrolling in contains coordination of benefits, workers' compensation and subrogation provisions and acknowledge MM's right to enforce these provisions. Any employee who receives money from the Health Care Plan to which he or she is not entitled will be required to fully reimburse the Plan. I also understand that I must notify BGSU within 31 days of occurrence of any changes in status."

I am gravity concerned at the breadth of the waiver of rights to privacy. The statement seems extraordinarily broad to the extent that you could ask my banker what medical advice he gave me or my children, that MM/BGSU could request or require notes of counselors, psychologists, not required for payment for treatment, that MM/BGSU could require notes of discussions not relating to treatment of a specific disorder, but of potential treatments. I am concerned that conversations in the examining room are no longer private under the statement provided in the photocopy of the enrollment form.

Who might be the “other person” in the statement? Any medical record released by clerical workers in a medical facility is already covered in the statement, in addition, I am concerned about the use of “without limitation” in a release statement of this sort. I understand the need for appropriate information.
Rebecca Ferguson, 09:25 AM 10/24/01 -0700, Re: Enrollment Form

from medical facilities for appropriate payments, however, the scope of the waiver is beyond my understanding.

Hope to hear from you soon.

Mary E. Zachary
Head, Access Services
Wm. T Jerome Library
Bowling Green State University
Bowling Green, OH 43402
Voice - (419) 372-2054
Fax: (419) 372-8877

Rebecca C. Ferguson
Assistant Vice President, Human Resources
100 College Park
Bowling Green State University
Bowling Green, Ohio 43403

Office Phone 419.372.2259
Fax: 419.372.2020

"The Office of Human Resources working as a team within the office and throughout the university:
"Recruits the Best
"Retains the Best
"And assists employees as they reinvest in their future."

Mary E. Zachary
Head, Access Services
Wm. T Jerome Library
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Bowling Green, OH 43402
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Fax: (419) 372-8877
Brain

Intensity ± Car, gas experience. –
Change score = change list.
Level of change = line of
your written analysis.

Data – rear in pain, the other leg is okay.
After climb – you’re in question –
ineligible.

After 34 •

Color of milk more, experience longer.

Cups, like two things

Draft, beer

Based on usage, relative / disadvantage – really.