Personnel Welfare Committee - Correspondence 1985-1986

Bowling Green State University. Administrative Staff Council

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Notes

1. Colored Ink
2. Photocopies
MEMORANDUM

To: Gregg DeCrane,
Chair, ASC

From: Paul Yon,
Chair, PWC

RE: Fee Waiver Policy

Date: July 8, 1985

Please find enclosed the Committee's recommendation for revising the Fee Waiver Policy for the Administrative Staff Handbook. I think you will find the revision easier to read and to interpret without having to challenge policy. My suggestion is to present this to Administrative Council for its approval. Since it does not pertain to policy, I do not think it is necessary to bring it before the entire council.

If you have any comments, etc., please give me a call.

PY/jm

cc. Susan Caldwell
Encl.
Fee Waiver Policy (BGSU Board of Trustees, 1976, Revised: ____
______________________________)

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 a 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 four courses each year, not to exceed two courses per academic term, on either an audit or credit basis, without payment of the instructional or general fees if:

1. The employee initiates a request via a fee waiver form. These forms are available in the Office of Administrative Staff Personnel Services (911 Administration 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 Office of Administrative Staff Personnel Services 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 Administrative Staff 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.

II. PART-TIME EMPLOYEE

A. ELIGIBILITY. A 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. 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 three courses per year; staff with contracts of 50% - 75% are eligible for two courses per year; staff with contracts of 25% - 49% are eligible for 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 instructional or general fees according to the same restrictions noted for full-time staff. (cf. conditions * **)

III. SPOUSE/CHILD

A. ELIGIBILITY. The child, children, and/or cohabitant spouse of a full-time administrative staff member who has completed five 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 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, 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 Administrative Staff Personnel Services—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 instructional 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 is able to receive fee waiver benefits provided that:

1. the individual was eligible to be considered a personal exemption under provision of section 151 of the Internal Revenue Code or

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.

3. The deceased administrative staff member served at Bowling Green State University for five years or more.

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.

B. 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 instructional 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 PERS 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 instructional fees while the retirees participate in the Supplemental Retirement Program. Please note that the retiree must be properly enrolled under the provisions of the Supplemental Retirement Program to receive the fee waiver benefit for dependents.

VI. 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 September 1, 1976, to provide for the payment of instructional fees under exceptional and appropriate circumstances.

B. For further information about fee waiver benefits, please contact the Office of Administrative Staff Personnel Services (911 Administration Building).

* 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 four courses, not to exceed two courses per academic term, with a waiver of fees. Part-time administrative staff members may take fewer than 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 of their regular work schedules. When this is not feasible, staff members may, with the approval of their supervisors, enroll for a class during the regular work day. All time taken from the regular work day to attend classes must be made up.
MEMORANDUM

TO: Paul Yon, Director
    Center for Archival Collections

FROM: Shirley Colman, Coordinator
    Contract Personnel Information

SUBJ: Fee Waiver Statistics

July 23, 1985

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
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<th>ACADEMIC YEAR</th>
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Dear Paul:

The ad hoc Committee on Salary Increments Policy has met twice to consider the reactions of the Vice Presidents which you passed on to us several weeks ago. Among the major questions raised, and our responses to them, are the following:

1) Q: Does the proposal pertain to university administrative personnel?
   A: No, it does not. The committee understood its task to be the development of a proposal for a faculty salary increments policy. Throughout its deliberations it thought only in those terms. There were no representatives of the administrative staff (aside from two with basic academic functions) on the committee, nor was the committee conversant with the process and criteria currently used to evaluate administrative personnel. The committee believes that it may be well to establish a separate committee, with appropriate membership, to develop a salary increments proposal for administrative personnel.

2) Q: Is the three-stage process of evaluation in the proposed policy so complex as to make it difficult to manage in a reasonable time period?
   A: The committee believes that once the system is in place and understood across the campus, the process of evaluation should be facilitated, not made more difficult. Of course, it may require some additional time to put it in place.

3) Q: Where do promotions fit into the whole scheme?
   A: Policy on promotions is not a part of this document. The committee supports continuation of the current policy/procedure on promotions.

4) Q: Does the failure of a "special achievement award program" tried for one year a decade ago cause serious concern about the proposed "University merit" (bonus) category in our proposal?
A: The committee believes there are a number of differences between the 1974-75 program and what is proposed as part of this policy. In 1974-75, the program included all sorts of university personnel (administrative staff, faculty, civil service employees, etc.); the levels of screening were unclear; the bases of recognition were not systematic so far as the faculty could discern; and the evaluating committee included a number of off-campus persons. The committee appreciates the "warning signal" given to it, but sees its proposal for university merit as being altogether different from the special achievement awards of a decade ago.

5) Q: Is there any way to clarify/simplify the proposal so that the various "levels" of merit are not confusing to the faculty?

A: The committee made a major change in terminology which it believes will be helpful. It has replaced what was initially labeled Category I, Category II (Levels A and B), and Category III merit with what it now calls departmental merit (basic and special), collegiate merit, and university merit.

The committee discussed a variety of other things, chief among them the question whether, if we assign a $400 figure to the "merit units" described in the proposal, the total effect of the policy will, in reality, be to distribute as much (or more) money across-the-board as we currently do, or put more dollars into special merit. Certainly we favor the latter. After much deliberation, we determined to let things as they are, but we suspect this will be a topic of discussion as the proposal is shared with the university community. There will no doubt be others as well, perhaps including some that we have not foreseen. But we now deem the proposal ready to move to the next stage in the deliberation process.

Cordially,

William R. Rock
Professor
Chairman, Ad Hoc Committee on
Salary Increments Policy

WRR: cw
Introduction to Proposed Faculty Salary Increments Policy for BGSU

This draft proposal for a faculty salary increments policy at BGSU has been prepared by a seven-member committee appointed by President Otscamp in the fall of 1984. The committee wrestled long and hard with a variety of schemes and found all of them to have varying strengths and weaknesses. It discovered, in the process of its deliberation, that there is considerable diversity of perceived mission and professional expectation among collegiate and departmental units on the campus; and it recognizes that the devising of a single policy that will be agreeable to all segments of the university is a very large order.

The committee believes that its policy proposal represents change from current practice in a number of ways. Chief among them are these:

1) The policy is based wholly on merit. There is no "automatic" salary increment irrespective of a person's performance.

2) The designation of a "unit increment" for merit provides faculty the opportunity for equal reward for performance independent of rank.

3) Some differential among departments, in terms of the total merit money awarded within them, is possible.

4) There is increased participation by the Deans and the Vice President for Academic Affairs in the merit evaluation process.

5) The idea of maintaining a 60/40 (or some other) percentage "break" in the distribution of salary money is eliminated. Money for departmental special merit and collegiate merit will be identified first. The amount of money available for departmental basic merit will be the residual of the total salary pool after the money to be distributed in the other categories has been identified.

6) Greater year-to-year consistency in the merit awards made for specific kinds of performance will be achieved.

7) The award of a bonus (university merit) recognizes exceptional performance but does not incorporate continuing recognition for a single accomplishment into the base salary.

8) Market-inequity adjustments are recognized as exceptional and must be accommodated outside of annual salary increments.

This proposal provides a scheme for the distribution of merit money on the basis of established criteria. It does not create new criteria or influence those that are currently in place. Such criteria remain the responsibility of departmental and collegiate units.

The proposal is submitted for your review and deliberation. After general discussion by the university community, it will be presented to the Faculty Senate for action.
An effective faculty compensation structure must be designed on the principles of equity, rationality, competitiveness in the marketplace, retention of quality faculty, recognition of excellence, responsiveness to economic conditions, and potential for career growth. Consequently, the goals of the proposed faculty salary increments policy for Bowling Green State University are as follows:

1. To establish a relationship between job performance and salary through the rewarding of meritorious performance.
2. To strive for fair and equitable treatment among individual faculty and among academic units through time.
3. To assist the institution in maintaining quality faculty and a competitive position among universities of comparable size, academic configuration, and mission.
4. To reduce faculty uncertainty regarding the allocation of salary increments.

**OPERATIONAL GUIDELINES**

In order to implement the proposed faculty salary increments policy, the following guidelines should be observed:

1. The salary increments policy at BGSU shall be based entirely on merit.
2. Merit shall be divided into the categories of departmental, collegiate, and university merit:

   **Departmental Merit**

   There shall be two kinds of departmental merit, basic and special.

   a. **Basic merit** is related to job performance during the preceding calendar year in that the faculty member shall have demonstrated a reasonable level of effort and accomplishment deemed to be satisfactory in terms of the professional obligations and responsibilities customarily associated with the position. This may not be construed as an automatic increase. Those faculty who, based on peer evaluation, do not satisfactorily carry out their assigned responsibilities shall not be eligible for basic merit.
Basic merit monies shall be derived from the residual salary increment pool, i.e., the monies remaining in the total university salary pool after the monies needed for all other categories of merit have been identified. These monies shall be distributed as follows:

1. One-half of the money in the residual salary pool shall be allocated to qualified faculty as a percentage of their base salary.

2. One-half of the money in the residual salary pool shall be used to provide an identical dollar increment to all qualified faculty.

b. Special merit shall be allocated to faculty whose performance in the previous calendar year is clearly above and beyond the norm, in accordance with merit policies established at the department/college level.

A faculty member may receive one to four units (each unit carrying an equal dollar amount) of merit increase according to the quality of his/her performance.

Decisions on both kinds of departmental merit shall be made at the department/school level and be overseen by the respective college deans.

Collegiate Merit

Collegiate merit, constituting one or two units (of a dollar amount equal to the units of departmental merit), shall be awarded by the dean of the college.

The dean shall utilize a college-wide committee to assist in developing criteria for collegiate merit, to review the performance records of persons recommended by departments/schools for collegiate merit, and to recommend those most deserving of collegiate merit.

In order to qualify for collegiate merit, a faculty member shall normally have received four units of merit from the department and be forwarded by the department as a candidate for collegiate merit.

University Merit

University merit shall represent a noncumulative monetary reward (bonus).

University merit shall be allocated to faculty:

1) Who have made exceptional contributions during the preceding calendar year or
2) Who have made special and continuing contributions over a longer period of time. (This shall permit continuing recognition of faculty members who have achieved national/regional recognition and shall encourage continued productivity.)

University merit shall be allocated by the Vice President for Academic Affairs, who shall utilize a university-wide committee to assist in developing criteria for university merit, to review the performance records of persons recommended for university merit, and to recommend those most deserving of university merit.

In order to qualify for university merit, a faculty member shall normally have received two units of collegiate merit and be recommended by the dean as a candidate for university merit.

The university shall dedicate a fund to support university merit allocation initially. Once the fund is established as a budget item, no new budgetary allocation will be required because the awards will be made on a one-time basis and shall not become part of the base salary of the recipient.

3. Individual departments/schools shall establish and publish criteria for departmental merit in the areas of teaching, research, and service consistent with college and university criteria. Individual departments also shall review annually faculty performance records and identify faculty who shall receive money from the two categories of departmental merit.

4. The dean of each college shall review and approve departmental criteria, giving attention to the issue of inter-departmental consistency. The criteria then shall be submitted to the Vice President for Academic Affairs for informational purposes and for review regarding reasonable consistency of criteria throughout the university.

5. After a three-year interval, university officials, in conjunction with the Faculty Senate, shall evaluate the salary system and modify it as necessary.

6. If the amount of new money available to the university for merit increases and departmental basic merit falls below 30% of the total salary pool, the monies in that category shall be allocated as a percentage of base salary; no identical dollar increments shall be provided.

7. Salary inequity and market adjustment issues shall be handled through designated university procedures.

8. The salary increment allocation process shall be tied directly to an effective faculty evaluation system.
Salary Policy Simulation

The attached materials provide an example of possible results from the implementation of the proposed salary policy. They incorporate the major provisions of the proposed policy and are basically illustrative in character.

This simulation utilizes selected benchmark data which approximates recent historical experience, i.e., a 7% merit pool and the average salary for university faculty in the three ranks of assistant, associate, and full professor. The selection of the assigned values used to illustrate the implementation of the policy (for example, the dollar value of merit units) as well as the size and distribution of the pool among the merit categories is arbitrary and would require implementation decisions to be made at the appropriate time.

This simulation is designed to provide an approximation of the consequences of the implementation of this policy for faculty at various ranks, various levels of performance, various salary levels, and at various times over a ten-year period. Although the model assumes consistent performance for each of the modeled faculty and does not explicitly attempt to handle varying performance levels by any one faculty member or expected matriculation through ranks, it reflects the major consequences of the proposed policy.

Salary adjustments other than normal merit type increases (e.g., market or inequity) are to be accommodated outside the annual salary increment mechanisms.

Some basic assumptions essential to interpreting the simulation (and understanding the policy proposal) follow:

1) 7% incremental funds, totaling $2,100,000, are available; the number of full-time faculty is 730; basic department merit is $838 plus 2.04% of base salary.

2) A "unit" of merit is $400. This figure was based on actual monies available for faculty salary increments during the past several years and what the committee perceived to be an appropriate division of those monies between departmental and collegiate merit. The figure may fluctuate from year to year depending upon the total amount of the salary pool available, but it is hoped that the figure will remain relatively steady in order to achieve the objective of year-to-year consistency in the merit awards made for specific kinds of performance.

3) Units of merit allocated to departments for the determination of departmental special merit are equal to 2.5 times the number of continuing faculty; and units of merit allocated to colleges for the determination of collegiate merit are equal to .5 times the number of full-time continuing faculty. These figures have been arrived at on the basis of the committee's best judgment as to the most equitable distribution system and the number of faculty who would be likely to qualify for awards in these categories in a given year.
4) The university merit award (bonus) is $2000. This is received by no more than 10% of the faculty in a given year. Thus the fund to be established as a continuing university budget item (and not funded from incremental monies) is approximately $140,000 so long as the size of the faculty remains stable.

5) The policy proposal is workable (i.e. fair and equitable) when the annual salary increment money available falls somewhere between 4% and 9%. If the amount available falls outside this range, the whole model is called into question and would have to be reviewed.
### Simulations of Faculty Profiles: Faculty Merit Category

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<tr>
<th>Salary</th>
<th>Dept. Basic</th>
<th>Dept. SP + COL</th>
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<th>Total Sal.</th>
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| B       | 30000       | 1450           | 800  | 2250        | 32250      | 7.50     |                     |
| DEPT.SP | 2           |                |      |             |            |          |                     |
| C       | 30000       | 1450           | 1600 | 3050        | 33050      | 10.17    |                     |
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| D       | 30000       | 1450           | 2400 | 3850        | 33850      | 12.83    |                     |
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| E       | 30000       | 1450           | 2400 | 2000        | 33850      | 12.83    |                     |
| DEPT.SP+COL | 6        |              |      |            |            |          |                     |
| Univ YES |             |                |      |             |            |          |                     |

| **Full Professor** |             |                |      |             |            |          |                     |
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| C       | 38000       | 1614           | 1600 | 3214        | 41214      | 8.46     |                     |
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| D       | 38000       | 1614           | 2400 | 4014        | 42014      | 10.56    |                     |
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| E       | 38000       | 1614           | 2400 | 2000        | 42014      | 10.56    |                     |
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### New Base Year 0-10:
- **Year 0**: Base $YR 0-10$ Merit Change $\$ BASE CHANGE$.
MEMORANDUM

TO:        Paul Yon
            Chair, ASC Personnel Welfare Committee

FROM:  Gregg DeCrane
            Assistant Vice President for Student Affairs
            Student Activities and Orientation

DATE:     August 29, 1985

SUBJECT: Appointment of Norma Stickler

Please accept this formal notice of the appointment of Norma Stickler as a member of the Personnel Welfare Committee. Norma's work with and devotion to the Administrative Staff Council has been exceptional. She will make a great addition to your already fine committee.

GD:dkh

cc: Norma Stickler
    ASC Exec.
Library Faculty Meeting Agenda*
September 10, 1985
10:00 a.m. Room 126

1. Approval of Minutes

2. Draft report of the ad hoc Committee on Salary Increments (attached)

3. Other

*Note: Because of this item's pertinence throughout Libraries and Learning Resources, all faculty within LLR are invited to this meeting.
MEMORANDUM

TO: Deans and Chairs
FROM: Paul J. Olscamp, President

Enclosed please find a copy of the draft report of the ad hoc Committee on Salary Increments Policy at Bowling Green State University, which I appointed a year ago and which is chaired by Professor William Rock. I have enclosed a roster of the committee membership as it was given in my general address to the Faculty on August 26.

As you can see, this is a draft proposal. I have also appended a letter from Professor Rock dated July 25 in which he summarizes the reactions of the committee members to some questions raised by the vice presidents, who examined the draft proposal at my request.

I believe this draft proposal for faculty salary increments is very interesting indeed; both provocative and in some ways ingenious. It is also seems to me to answer many of the questions traditionally raised about a merit policy. Before reaching a final position, and before asking the committee to formulate a final draft of their proposal for submission to the Faculty Senate and the relevant committees thereof, I would appreciate it very much if you would distribute copies of this draft proposal to the Faculty in your departments and collegiate units, and discuss the pros and cons of the proposal in depth. I would appreciate your forwarding through the deans of your colleges, or directly to me, your reactions to the proposal so that the Rock Committee can consider them in the formulation of its final version.

By copy of this memorandum I am also forwarding a courtesy copy of the draft proposal to the Senate Executive Committee for their information.

"An Environment for Excellence"
I believe that compensation policy, meaning salary and benefits, will be a topic of high priority for consideration by the Faculty Senate and the administration this coming year. I do hope that you will take the time to give serious consideration to this proposal, and to make known your reactions to it.

Many thanks.

PJO:mg
Attachments
Ad Hoc Committee on Salary Increments Policy

Dr. Kendall Baker
College of Arts and Sciences

Dr. Eloise E. Clark
Vice President for Academic Affairs

Dr. Paul Mueller
Finance and Insurance

Dr. Leo Navin
Economics

Dr. Reginald Noble
Biological Sciences

Dr. Martha Tack
Education

Dr. William Rock, Chair
History
Introduction to Proposed Faculty Salary Increments Policy for BGSU

This draft proposal for a faculty salary increments policy at BGSU has been prepared by a seven-member committee appointed by President Olscamp in the fall of 1984. The committee wrestled long and hard with a variety of schemes and found all of them to have varying strengths and weaknesses. It discovered, in the process of its deliberation, that there is considerable diversity of perceived mission and professional expectation among collegiate and departmental units on the campus; and it recognizes that the devising of a single policy that will be agreeable to all segments of the university is a very large order.

The committee believes that its policy proposal represents change from current practice in a number of ways. Chief among them are these:

1) The policy is based wholly on merit. There is no "automatic" salary increment irrespective of a person's performance.

2) The designation of a "unit increment" for merit provides faculty the opportunity for equal reward for performance independent of rank.

3) Some differential among departments, in terms of the total merit money awarded within them, is possible.

4) There is increased participation by the Deans and the Vice President for Academic Affairs in the merit evaluation process.

5) The idea of maintaining a 60/40 (or some other) percentage "break" in the distribution of salary money is eliminated. Money for departmental special merit and collegiate merit will be identified first. The amount of money available for departmental basic merit will be the residual of the total salary pool after the money to be distributed in the other categories has been identified.

6) Greater year-to-year consistency in the merit awards made for specific kinds of performance will be achieved.

7) The award of a bonus (university merit) recognizes exceptional performance but does not incorporate continuing recognition for a single accomplishment into the base salary.

8) Market-inequity adjustments are recognized as exceptional and must be accommodated outside of annual salary increments.

This proposal provides a scheme for the distribution of merit money on the basis of established criteria. It does not create new criteria or influence those that are currently in place. Such criteria remain the responsibility of departmental and collegiate units.

The proposal is submitted for your review and deliberation. After general discussion by the university community, it will be presented to the Faculty Senate for action.
FACULTY SALARY INCREMENTS POLICY FOR BOWLING GREEN STATE UNIVERSITY

GOALS

An effective faculty compensation structure must be designed on the principles of equity, rationality, competitiveness in the marketplace, retention of quality faculty, recognition of excellence, responsiveness to economic conditions, and potential for career growth. Consequently, the goals of the proposed faculty salary increments policy for Bowling Green State University are as follows:

1. To establish a relationship between job performance and salary through the rewarding of meritorious performance.

2. To strive for fair and equitable treatment among individual faculty and among academic units through time.

3. To assist the institution in maintaining quality faculty and a competitive position among universities of comparable size, academic configuration, and mission.

4. To reduce faculty uncertainty regarding the allocation of salary increments.

OPERATIONAL GUIDELINES

In order to implement the proposed faculty salary increments policy, the following guidelines should be observed:

1. The salary increments policy at BGSU shall be based entirely on merit.

2. Merit shall be divided into the categories of departmental, collegiate, and university merit:

   Departmental Merit

   There shall be two kinds of departmental merit, basic and special.

   a. Basic merit is related to job performance during the preceding calendar year in that the faculty member shall have demonstrated a reasonable level of effort and accomplishment deemed to be satisfactory in terms of the professional obligations and responsibilities customarily associated with the position. This may not be construed as an automatic increase. Those faculty who, based on peer evaluation, do not satisfactorily carry out their assigned responsibilities shall not be eligible for basic merit.
Basic merit monies shall be derived from the residual salary increment pool, i.e., the monies remaining in the total university salary pool after the monies needed for all other categories of merit have been identified. These monies shall be distributed as follows:

1. One-half of the money in the residual salary pool shall be allocated to qualified faculty as a percentage of their base salary.

2. One-half of the money in the residual salary pool shall be used to provide an identical dollar increment to all qualified faculty.

b. Special merit shall be allocated to faculty whose performance in the previous calendar year is clearly above and beyond the norm, in accordance with merit policies established at the department/college level.

A faculty member may receive one to four units (each unit carrying an equal dollar amount) of merit increase according to the quality of his/her performance.

Decisions on both kinds of departmental merit shall be made at the department/school level and be overseen by the respective college deans.

**Collegiate Merit**

Collegiate merit, constituting one or two units (of a dollar amount equal to the units of departmental merit), shall be awarded by the dean of the college.

The dean shall utilize a college-wide committee to assist in developing criteria for collegiate merit, to review the performance records of persons recommended by departments/schools for collegiate merit, and to recommend those most deserving of collegiate merit.

In order to qualify for collegiate merit, a faculty member shall normally have received four units of merit from the department and be forwarded by the department as a candidate for collegiate merit.

**University Merit**

University merit shall represent a noncumulative monetary reward (bonus).

University merit shall be allocated to faculty:

1) Who have made exceptional contributions during the preceding calendar year or
2) Who have made special and continuing contributions over a longer period of time. (This shall permit continuing recognition of faculty members who have achieved national/regional recognition and shall encourage continued productivity.)

University merit shall be allocated by the Vice President for Academic Affairs, who shall utilize a university-wide committee to assist in developing criteria for university merit, to review the performance records of persons recommended for university merit, and to recommend those most deserving of university merit.

In order to qualify for university merit, a faculty member shall normally have received two units of collegiate merit and be recommended by the dean as a candidate for university merit.

The university shall dedicate a fund to support university merit allocations initially. Once the fund is established as a budget item, no new budgetary allocation will be required because the awards will be made on a one-time basis and shall not become part of the base salary of the recipient.

3. Individual departments/schools shall establish and publish criteria for departmental merit in the areas of teaching, research, and service consistent with college and university criteria. Individual departments also shall review annually faculty performance records and identify faculty who shall receive money from the two categories of departmental merit.

4. The dean of each college shall review and approve departmental criteria, giving attention to the issue of inter-departmental consistency. The criteria then shall be submitted to the Vice President for Academic Affairs for informational purposes and for review regarding reasonable consistency of criteria throughout the university.

5. After a three-year interval, university officials, in conjunction with the Faculty Senate, shall evaluate the salary system and modify it as necessary.

6. If the amount of new money available to the university for merit increases and departmental basic merit falls below 30% of the total salary pool, the monies in that category shall be allocated as a percentage of base salary; no identical dollar increments shall be provided.

7. Salary inequity and market adjustment issues shall be handled through designated university procedures.

8. The salary increment allocation process shall be tied directly to an effective faculty evaluation system.
Salary Policy Simulation

The attached materials provide an example of possible results from the implementation of the proposed salary policy. They incorporate the major provisions of the proposed policy and are basically illustrative in character.

This simulation utilizes selected benchmark data which approximates recent historical experience, i.e., a 7% merit pool and the average salary for university faculty in the three ranks of assistant, associate, and full professor. The selection of the assigned values used to illustrate the implementation of the policy (for example, the dollar value of merit units) as well as the size and distribution of the pool among the merit categories is arbitrary and would require implementation decisions to be made at the appropriate time.

This simulation is designed to provide an approximation of the consequences of the implementation of this policy for faculty at various ranks, various levels of performance, various salary levels, and at various times over a ten-year period. Although the model assumes consistent performance for each of the modeled faculty and does not explicitly attempt to handle varying performance levels by any one faculty member or expected matriculation through ranks, it reflects the major consequences of the proposed policy.

Salary adjustments other than normal merit type increases (e.g. market or inequity) are to be accommodated outside the annual salary increment mechanisms.

Some basic assumptions essential to interpreting the simulation (and understanding the policy proposal) follow:

1) 7% incremental funds, totaling $2,100,000, are available; the number of full-time faculty is 730; basic department merit is $838 plus 2.04% of base salary.

2) A "unit" of merit is $400. This figure was based on actual monies available for faculty salary increments during the past several years and what the committee perceived to be an appropriate division of those monies between departmental and collegiate merit. The figure may fluctuate from year to year depending upon the total amount of the salary pool available, but it is hoped that the figure will remain relatively steady in order to achieve the objective of year-to-year consistency in the merit awards made for specific kinds of performance.

3) Units of merit allocated to departments for the determination of departmental special merit are equal to 2.5 times the number of continuing faculty; and units of merit allocated to colleges for the determination of collegiate merit are equal to .5 times the number of full-time continuing faculty. These figures have been arrived at on the basis of the committee's best judgment as to the most equitable distribution system and the number of faculty who would be likely to qualify for awards in these categories in a given year.
4) The university merit award (bonus) is $2000. This is received by no more than 10% of the faculty in a given year. Thus the fund to be established as a continuing university budget item (and not funded from incremental monies) is approximately $140,000 so long as the size of the faculty remains stable.

5) The policy proposal is workable (i.e. fair and equitable) when the annual salary increment money available falls somewhere between 4% and 9%. If the amount available falls outside this range, the whole model is called into question and would have to be reviewed.
## Simulations of Faculty Profiles: Merit Category

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President Paul J. Olscamp  
Bowling Green State University

Dear Paul:

The ad hoc Committee on Salary Increments Policy has met twice to consider the reactions of the Vice Presidents which you passed on to us several weeks ago. Among the major questions raised, and our responses to them, are the following:

1) Q: Does the proposal pertain to university administrative personnel?

   A: No, it does not. The committee understood its task to be the development of a proposal for a faculty salary increments policy. Throughout its deliberations it thought only in those terms. There were no representatives of the administrative staff (aside from two with basic academic functions) on the committee, nor was the committee conversant with the process and criteria currently used to evaluate administrative personnel. The committee believes that it may be well to establish a separate committee, with appropriate membership, to develop a salary increments proposal for administrative personnel.

2) Q: Is the three-stage process of evaluation in the proposed policy so complex as to make it difficult to manage in a reasonable time period?

   A: The committee believes that once the system is in place and understood across the campus, the process of evaluation should be facilitated, not made more difficult. Of course, it may require some additional time to put it in place.

3) Q: Where do promotions fit into the whole scheme?

   A: Policy on promotions is not a part of this document. The committee supports continuation of the current policy/procedure on promotions.

4) Q: Does the failure of a "special achievement award program" tried for one year a decade ago cause serious concern about the proposed "University merit" (bonus) category in our proposal?
A: The committee believes there are a number of differences between the 1974-75 program and what is proposed as part of this policy. In 1974-75, the program included all sorts of university personnel (administrative staff, faculty, civil service employees, etc.); the levels of screening were unclear; the bases of recognition were not systematic so far as the faculty could discern; and the evaluating committee included a number of off-campus persons. The committee appreciates the "warning signal" given to it, but sees its proposal for university merit as being altogether different from the special achievement awards of a decade ago.

5) Q: Is there any way to clarify/simplify the proposal so that the various "levels" of merit are not confusing to the faculty?

A: The committee made a major change in terminology which it believes will be helpful. It has replaced what was initially labeled Category I, Category II (Levels A and B), and Category III merit with what it now calls departmental merit (basic and special), collegiate merit, and university merit.

The committee discussed a variety of other things, chief among them the question whether, if we assign a $400 figure to the "merit units" described in the proposal, the total effect of the policy will, in reality, be to distribute as much (or more) money across-the-board as we currently do, or put more dollars into special merit. Certainly we favor the latter. After much deliberation, we determined to let things as they are, but we suspect this will be a topic of discussion as the proposal is shared with the university community. There will no doubt be others as well, perhaps including some that we have not foreseen. But we now deem the proposal ready to move to the next stage in the deliberation process.

Cordially,

William R. Rock
Professor
Chairman, Ad Hoc Committee on Salary Increments Policy

WRR: cw
From Linda Hamilton: (Elton Ringer)

University Budget 440,000
601,000

Feb 5:

Undergraduate 1580/yr.
Spouse 1580/yr.
Graduate Student 2160/yr.
September 10, 1985

TO: Paul Von
   Administrative Staff Council

FROM: Diane Regan
   Coordinator of Library Circulation

RE: Rate Changes for Life Insurance Coverage

The recent memo from Dr. Eskin (8-30-85) announcing the rate changes in the insurance coverage for full-time faculty and administrative staff concerns me.

The increase for my family (1 faculty member and 1 administrative staff member) is $214.00. The cost of the term life insurance for my family for next year will be $712.00. This seems to me to be an expensive fringe benefit.

As University employees, we have no choice about our participation in this program and we must absorb all cost increases in full. I am uncertain if, at this annual cost and under these conditions, this insurance can be called a 'benefit.' I am not sure but that I could obtain comparable coverage at a cheaper rate from my private insurance company.

I would urge the Personnel Welfare Committee to do what it could to see that our current fringe benefit package is reviewed and recommendations made for warranted changes.
Effective for the period beginning September 1, 1985, it will be necessary to return to the group life insurance rates in effect prior to a 30% rate reduction in 1981. This adjustment in group life insurance rates is required by an unusually bad claim experience since September 1, 1983, which has eliminated our group's annually anticipated dividends and exhausted the carrier-required and previously established Claim Stabilization Reserve. Since September 1, 1983, our group has experienced a total of nine deaths. Premiums for 1984-85 and 1985-86 are as shown in the following table:

<table>
<thead>
<tr>
<th>SALARY RANGE</th>
<th>TERM LIFE INSURANCE</th>
<th>ANNUAL PREMIUM 1984-85</th>
<th>ANNUAL PREMIUM 1985-86</th>
<th>1985-86 PAYROLL DED. NINE</th>
<th>1985-86 PAYROLL DED. TWELVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below $12,000</td>
<td>$30,000</td>
<td>$129.00</td>
<td>$184.00</td>
<td>$15.34</td>
<td>$20.44</td>
</tr>
<tr>
<td>$12,000 - $16,999</td>
<td>$40,000</td>
<td>$147.00</td>
<td>$210.00</td>
<td>$17.50</td>
<td>$23.33</td>
</tr>
<tr>
<td>$17,000 - $21,999</td>
<td>*</td>
<td>$189.00</td>
<td>$270.00</td>
<td>$22.50</td>
<td>$30.00</td>
</tr>
<tr>
<td>$22,000 - $26,999</td>
<td>*</td>
<td>$219.00</td>
<td>$313.00</td>
<td>$26.08</td>
<td>$34.78</td>
</tr>
<tr>
<td>$27,000 and over</td>
<td>**</td>
<td>$279.00</td>
<td>$399.00</td>
<td>$33.25</td>
<td>$44.33</td>
</tr>
</tbody>
</table>

* = Two and one-half times annual salary.
** = Two and one-half times annual salary to a maximum of $150,000.

Considerable concern has been expressed about the present life insurance program. Mercer-Meidinger, the University consultant on fringe benefits has recommended that the program be changed. For the past several months the University Insurance Committee has reviewed all aspects of the fringe benefit program, including life insurance, and a report is expected soon. The earliest that a change could be made, however, is Fall, 1986.

Additionally, inflation and claims experience of the group health insurance program during the contract period from September 1, 1984 through August 31, 1985, and as projected for the ensuing twelve months, will require a 4.95% increase in the employee's contribution toward family coverage for hospitalization and major medical. This increase in deductions will be effective for coverage starting September 1, 1985 and will be deducted beginning with the September 20 pay check. The revised premiums applicable to family coverage are as follows:

<table>
<thead>
<tr>
<th>MONTHLY DEDUCTION</th>
<th>12 PAY BASIS</th>
<th>9 PAY BASIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOSPITALIZATION</td>
<td>$57.84</td>
<td>$77.12</td>
</tr>
<tr>
<td>MAJOR MEDICAL</td>
<td>$18.03</td>
<td>$24.04</td>
</tr>
</tbody>
</table>

Please note that rates applicable to the University's contribution towards single coverage for the employee have increased accordingly by the same percentage.
state university

To Paul:

Dear Dean:

Paul:

I wished to the question of the "human rights" criteria in the performance evaluation reports. The feeling of the administrative council is that this is an item (absenteeism, courtesy, etc.) that is understood and expected of everyone—

it wasn't clear to us if the same types of evaluation are the same criteria.

Susan

1-30-72
September 17, 1985

MEMORANDUM

TO: Wayne Colvin, Chair
Evaluation and Merit Committee

FROM: Richard R. Eakin
Vice President for Planning and Budgeting

President Olscamp and the Administrative Council have reviewed the report of your committee relative to administrative staff evaluations. Overall the response to the report was quite positive. The vice presidents have agreed to proceed with evaluations according to the strategies outlined in your report. One exception to this approval centers on redundancy among the criteria listed under item #3 in your report. Namely, university involvement, university and professional service and service to the university community appear to deal with the same issues. Thus, the vice presidents and the president were most emphatic that the criteria be refined to eliminate duplications. I am confident this matter can be handled with relative ease. Another exception is related to the item labeled "the support of human rights". It is the feeling of the president and vice presidents that this item is too vague to permit evaluation as stated and, in any event, represents an inherent expectation of all employees at the university to abide by university policies in this particular area. It is our judgment that this item should not be included among evaluative criteria.

Finally there is considerable support among the vice presidents for the concept of goal setting and for evaluations of employees based upon achievement of agreed-upon goals.

Thank you for your splendid work on this important matter. If you have any questions, please feel free to call me.

RRE: sf

copy: President Olscamp
Administrative Council
Susan Caldwell
Gregg DeCrane
Final Report of the Evaluation and Merit Committee

Based upon review of data compiled from the Administrative Contract Staff Survey on Evaluation, the Committee makes the following recommendations:

1. All administrative contract staff should be evaluated primarily on the basis of:
   
   * Performance of primary duties
   * Performance of occasional duties
   * Attainment of agreed upon goals

2. It is strongly recommended that each vice president establish a committee composed of all the Administrative Staff Council representatives of that area to develop a format for written evaluations for the area. Each vice president and Administrative Staff Council representatives should agree to the format. All formats for written evaluation will include these criteria:
   
   * Performance of primary duties
   * Performance of occasional duties
   * Attainment of agreed upon goals

3. Within each department or area, a staff member may be evaluated on additional criteria appropriate to the position and agreed to in advance by the staff member and the supervisor. These criteria may include, but are not limited to:

<table>
<thead>
<tr>
<th>Supervisory skills</th>
<th>Learning new skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovations</td>
<td>University and professional service</td>
</tr>
<tr>
<td>University Involvement</td>
<td>Peer relationships</td>
</tr>
<tr>
<td>Professional development</td>
<td>Research/publications/presentations</td>
</tr>
<tr>
<td>Support of human rights</td>
<td>Communication skills</td>
</tr>
<tr>
<td>Counseling</td>
<td>Student evaluations</td>
</tr>
<tr>
<td>Awards/honors</td>
<td>Service to university</td>
</tr>
<tr>
<td>Teaching</td>
<td>constituency</td>
</tr>
<tr>
<td>Service on governance bodies</td>
<td></td>
</tr>
<tr>
<td>Facility Management</td>
<td></td>
</tr>
</tbody>
</table>

4. The evaluation process should occur in two steps.

   A. The staff member and supervisor should meet and accomplish the following:

   * Review and determine staff member's job description and goals for the next contract period and make any necessary changes to the basic job description.

   * Based on the above agreements, determine evaluation criteria that will be used to assess the staff member's performance.
* The staff member supervisor will confirm the job description, goals and evaluation criteria in writing.

A. Before the beginning of the next contract period, the supervisor will provide the staff member with a written evaluation based on the previous agreements and will discuss the evaluation with the staff member. The employee may respond in writing to the evaluation, and this reply will become part of the evaluation.

5. The supervisor will send copies of the written evaluation to the Administrative Staff Personnel office and to the staff member.

Respectfully submitted,

Wayne S. Colvin, Chair
Nan Edgerton
Norma Stickler
Joan Morgan
Evaluation Committee
MEMORANDUM

TO: Dr. Richard R. Eakin
    Vice President for Planning & Budgeting

FROM: Joe Martini, Chair
       Administrative Staff Council

       Susan Caldwell, Director
       Administrative Staff Personnel Services

SUBJ: Report of ASC Committee on Evaluation

June 13, 1985

As you know, during the past year the Administrative Staff Council has been reviewing the evaluation process used for administrative staff at Bowling Green State University. A survey was conducted of all administrative staff members to assist in determining the content and process for evaluation.

After extensive deliberations and discussion at ASC meetings, the final report of the Evaluation Subcommittee was adopted on May 2, 1985. We have enclosed copies of the report and request that you present it to the Administrative Council for review and approval. Both the Administrative Staff Council and the Office of Administrative Staff Personnel Services are prepared to assist the President and Vice Presidents in implementing this performance evaluation program. We feel the program establishes a consistent procedure for evaluation while providing flexibility in the format and criteria for evaluation.

We would be happy to discuss this report with you at your convenience.

vf
Enclosure

XC: Gregg DeCrane, Chair-elect, ASC

Wayne Colvin, Chair, Evaluation and Merit Committee
MEMORANDUM

TO:  Susan Caldwell
     Pat Fitzgerald
     Norma Stickley
     Susan Darrow
     Ron Stoner

FROM: Paul Yon

RE: Personnel Welfare Committee.

DATE: September 23, 1985

I have extended to Elton Ringer an invitation to speak to the Committee about fee waiver funds and etc. at the 8 October meeting at 10:00 a.m. in the Archives, Fifth Floor, Jerome Library. Please plan to attend. Thanks.

"An Environment for Excellence"
To: President Olscamp  
From: Phil Mason  
Subject: Grievance & Hearing Procedures for Contract Staff

The grievance procedures contained in the contract staff handbook were reviewed during a recent discussion with Attorney Mattimoe. While it is not entirely clear, it appeared to Attorney Mattimoe that this procedure envisions that the hearing panel has authority to make the final decision in the grievance process. This would be in contrast to the faculty grievance procedure wherein the hearing panel can only make a recommendation.

Since it is known that the intent is not to give the hearing panel authority to make the final decision, my concern is not that we would be held to a decision which may be viewed as inappropriate rather my concern is that the policy as it is now written may create some confusion. Specifically, under Grievance and Hearing Procedures, Section II-E Resolution —

"The hearing panel will give written notice of its recommended disposition of the complaint ..." Then under Section II-F, -- "The decision of the hearing panel may be appealed in writing within seven calendar days ..." I hasten to reiterate that there should not be reason for serious concern but there may be potential for some misunderstanding; therefore, I recommend the following amendment to the contract staff handbook:

(pp 16) Grievance and Hearing Procedures, Sections II-E and II-F

The Director of Affirmative Action will facilitate the process for resolution of the complaint and will insure that THE appropriate administrative administrator MAKES A DECISION in a timely manner.

F. Appeal

The decision RECOMMENDATION of the hearing panel AND THE DECISION OF THE APPROPRIATE ADMINISTRATOR may be appealed in writing within seven calendar days of the decision, to the President of the University. The President (or designee) will respond in writing to all parties—complainant, respondent, chair of the hearing panel, Director of Affirmative action, and the appropriate vice president—concerning final disposition of the appeal within fourteen calendar days after receiving the appeal. The President's (or designee's) decision is final.

A copy of the Grievance and Hearing Procedures is attached for your convenience.

Attachment "An Environment for Excellence"
A public employee who is making contributions for full credit under division (B), (C), or (E) of section 145.33 of the Revised Code shall be ineligible to make concurrent contributions and receive concurrent credit under division (A) of section 145.32 of the Revised Code.

Sec. 145.397. (A) As used in this section, "Employing Unit" means a county, municipal corporation, park district, conservancy district, sanitary district, health district, township, metropolitan housing authority, public library, county law library, union cemetery, joint hospital, or other political subdivision or unit of local government; or, with respect to state employees, any state department, any part of a state department designated by the department as an employing unit, any state university, or any individual state board, bureau, commission, council, committee, agency, or administrative body.

In the case of an employee whose employing unit is in question, the employing unit is the unit through whose payroll the employee is paid.

(B) An employing unit may establish a retirement incentive plan for its eligible employees. In the case of a county, decisions on whether to establish a retirement incentive plan and on the terms of the plan shall be made by the board of county commissioners.

All terms of a retirement incentive plan shall be in writing.

A retirement incentive plan shall provide for purchase by the employing unit of service credit for eligible employees who elect to participate in the plan and for payment by the employing unit of the entire cost of the service credit purchased.

The document establishing the retirement incentive plan shall specify the length of time the plan shall remain in effect; every plan shall remain in effect for at least one year; every retirement incentive plan shall include provisions for the timely and impartial resolution of grievances and disputes arising under the plan.
NO EMPLOYING UNIT SHALL HAVE MORE THAN ONE RETIREMENT
INCENTIVE PLAN IN EFFECT AT ANY TIME.

(C) ANY CLASSIFIED OR UNCLASSIFIED EMPLOYEE OF THE
EMPLOYING UNIT WHO IS A MEMBER OF THE PUBLIC EMPLOYEES RETIREMENT
SYSTEM SHALL BE ELIGIBLE TO PARTICIPATE IN THE RETIREMENT
INCENTIVE PLAN ESTABLISHED BY HIS EMPLOYING UNIT IF HE MEETS THE
FOLLOWING CRITERIA:

(1) THE EMPLOYEE IS NOT AN ELECTED OFFICIAL, A MEMBER OF A
BOARD OR COMMISSION, OR A PERSON ELECTED OR APPOINTED TO SERVE A
TERM OF FIXED LENGTH;

(2) THE EMPLOYEE WILL BE ELIGIBLE TO RETIRE UNDER SECTION
146.32, 146.33, OR 145.34 OF THE REVISED CODE ON OR BEFORE THE
DATE OF TERMINATION OF THE RETIREMENT INCENTIVE PLAN WITH THE
ADDITIONAL SERVICE CREDIT THAT WOULD BE PURCHASED FOR THE
EMPLOYEE UNDER THE PLAN AND OTHER SERVICE CREDIT THE EMPLOYEE IS
ELIGIBLE TO PURCHASE UNDER THIS CHAPTER.

(3) THE EMPLOYEE AGREES TO RETIRE WITHIN NINETY DAYS AFTER
RECEIVING NOTICE FROM THE PUBLIC EMPLOYEES RETIREMENT SYSTEM THAT
SERVICE CREDIT HAS BEEN PURCHASED FOR HIM UNDER THIS SECTION.

PARTICIPATION IN THE PLAN SHALL BE AVAILABLE TO ALL
ELIGIBLE EMPLOYEES EXCEPT THAT THE EMPLOYING UNIT MAY LIMIT THE
NUMBER OF PARTICIPANTS IN THE PLAN TO A SPECIFIED PERCENTAGE OF
ITS EMPLOYEES WHO ARE MEMBERS OF THE PUBLIC EMPLOYEES RETIREMENT
SYSTEM ON THE DATE THE PLAN GOES INTO EFFECT. THE PERCENTAGE
SHALL NOT BE LESS THAN FIVE PER CENT OF SUCH EMPLOYEES. IF
PARTICIPATION IS LIMITED, EMPLOYEES WITH A GREATER SUM OF TOTAL
SERVICE CREDIT AS DEFINED IN DIVISION (H) OF SECTION 145.01 OF
THE REVISED CODE AND CREDIT THE EMPLOYEE IS ELIGIBLE TO PURCHASE
UNDER THIS CHAPTER HAVE THE RIGHT TO ELECT TO PARTICIPATE BEFORE
EMPLOYEES WITH A LESSER SUM OF TOTAL SERVICE CREDIT AND CREDIT
THE EMPLOYEE IS ELIGIBLE TO PURCHASE UNDER THIS CHAPTER. IN THE
CASE OF EMPLOYEES WITH THE SAME AMOUNT OF SERVICE WITH THE
EMPLOYING UNIT HAVE THE RIGHT TO ELECT TO PARTICIPATE BEFORE
A RETIREMENT INCENTIVE PLAN THAT LIMITS PARTICIPATION MAY PROVIDE THAT AN EMPLOYEE WHO DOES NOT NOTIFY THE EMPLOYING UNIT OF HIS DECISION TO PARTICIPATE IN THE PLAN WITHIN A SPECIFIED PERIOD OF TIME WILL LOSE PRIORITY TO PARTICIPATE IN THE PLAN AHEAD OF OTHER EMPLOYEES WITH LESS SENIORITY. THE TIME GIVEN TO AN EMPLOYEE TO ELECT TO PARTICIPATE AHEAD OF OTHER EMPLOYEES SHALL NOT BE LESS THAN THIRTY DAYS AFTER HE RECEIVES WRITTEN NOTICE THAT HE MAY PARTICIPATE IN THE PLAN.

(D) A RETIREMENT INCENTIVE PLAN SHALL PROVIDE FOR PURCHASE OF THE SAME AMOUNT OF SERVICE CREDIT FOR EACH PARTICIPATING EMPLOYEE, EXCEPT THAT THE EMPLOYER MAY NOT PURCHASE MORE SERVICE CREDIT FOR ANY EMPLOYEE THAN THE LEASER OF THE FOLLOWING:

(FIVE YEARS OF SERVICE CREDIT;)

(TWO) AN AMOUNT OF SERVICE CREDIT EQUAL TO ONE-FIFTH OF THE TOTAL SERVICE CREDITED TO THE PARTICIPANT UNDER SECTIONS 145.01 TO 145.58 OF THE REVISED CODE.

FOR EACH YEAR OF SERVICE CREDIT PURCHASED UNDER THIS SECTION, THE EMPLOYING UNIT SHALL PAY AN AMOUNT EQUAL TO THE ADDITIONAL LIABILITY RESULTING FROM THE PURCHASE OF THAT YEAR OF SERVICE CREDIT, AS DETERMINED BY AN ACTUARI EMPLOYED BY THE PUBLIC EMPLOYEES RETIREMENT BOARD.


THE EMPLOYING UNIT SHALL PAY THE COST OF THE SERVICE CREDIT TO BE PURCHASED TO THE PUBLIC EMPLOYEES RETIREMENT SYSTEM ON THE DATE AGREED TO BY THE EMPLOYEE AND THE EMPLOYING UNIT.
PAYMENT SHALL BE MADE IN ACCORDANCE WITH RULES ADOPTED BY THE PUBLIC EMPLOYEES RETIREMENT BOARD, AND THE BOARD SHALL NOTIFY THE MEMBER WHEN HE IS CREDITED WITH SERVICE PURCHASED UNDER THIS SECTION. IF THE EMPLOYEE DOES NOT RETIRE WITHIN NINETY DAYS AFTER RECEIVING NOTICE THAT HE HAS BEEN CREDITED WITH THE PURCHASED SERVICE CREDIT, THE SYSTEM SHALL REFUND TO THE EMPLOYING UNIT THE AMOUNT PAID FOR THE SERVICE CREDIT.

NO PAYMENT MADE TO THE PUBLIC EMPLOYEES RETIREMENT SYSTEM UNDER THIS SECTION SHALL AFFECT ANY PAYMENT REQUIRED BY SECTION 145.48 OF THE REVISED CODE.

Sec. 145.298. IN THE EVENT OF A PROPOSAL TO CLOSE A STATE CORRECTIONAL FACILITY, A STATE INSTITUTION FOR THE MENTALLY ILL, OR A STATE INSTITUTION FOR THE ADOPTIVE, TREATMENT, AND TRAINING OF THE MENTALLY RETARDED OR TO LAY OFF FIFTY OR MORE EMPLOYEES OF ANY EMPLOYING UNIT OR TEN PER CENT OR MORE OF THE EMPLOYEES OF ANY EMPLOYING UNIT WITHIN A SIX-MONTH PERIOD, THE EMPLOYING UNIT OF THE EMPLOYEES AFFECTED SHALL OFFER A RETIREMENT INCENTIVE PLAN. THE PLAN SHALL BE CONSISTENT WITH THE REQUIREMENTS OF SECTION 145.297 OF THE REVISED CODE EXCEPT THAT THE PLAN SHALL GO INTO EFFECT AT THE TIME THE LAYOFFS OR PROPOSED CLOSINGS ARE ANNOUNCED AND SHALL REMAIN IN EFFECT UNTIL THE DATE OF THE LAYOFFS OR CLOSINGS. IF THE EMPLOYING UNIT ALREADY HAS A RETIREMENT INCENTIVE PLAN IN EFFECT, THE PLAN SHALL REMAIN IN EFFECT AT LEAST UNTIL THE DATE OF THE LAYOFFS OR CLOSINGS. THE EMPLOYING UNIT MAY REVISE THE EXISTING PLAN TO PROVIDE GREATER BENEFITS, BUT IF IT REVISES THE PLAN, IT SHALL GIVE WRITTEN NOTICE OF THE CHANGES TO ALL EMPLOYEES WHO HAVE ELECTED TO PARTICIPATE IN THE ORIGINAL PLAN, AND IT SHALL PROVIDE THE GREATER BENEFITS TO ALL EMPLOYEES WHO PARTICIPATE IN THE PLAN, WHETHER THEIR ELECTIONS TO PARTICIPATE WERE MADE BEFORE OR AFTER THE DATE OF THE REVISION.

Section 2. That existing section 145.01 of the Revised Code is hereby repealed.
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 Kinger
10/1/85

1-14-86
Incorporated
with Galen
Mr. Wayne Colvin  
Residential Services  
Student Services Building 425  
Campus  

Dear Mr. Colvin:

Attached is a copy of our recent Library Council deliberations regarding smoking within the Jerome Library building. It is the feeling of the Council that smoking within public areas of the building, in addition to being unpleasant, presents serious health hazards to students and employees because of our unified air handling system within the building. All smoke is simply blended in with the existing air, and for the most part existing air is recirculated rather than being vented to the outside, especially in the winter time. Therefore this smoke is breathed and rebreathed by all individuals in the building.

In addition to its effects on people the smoke cannot have any good effect on the library materials we already house, many of which are old, fragile, and already deteriorating under the undesirable heating and lighting conditions within our building.

We understand that, as Chair of the University Safety Committee, you are looking into the question of smoking in campus buildings with a view toward an eventual recommendation to the BCSU Board of Trustees regarding a university-wide policy on this issue. We would like to go on record as supporting the notion that smoking ought to be banned from common public areas in university buildings, including bathrooms in those buildings, and we attach a copy of the Ohio Revised Code which seems to indicate that the university has a clear right to make such a regulation.

Please let me know if I or the Library Council can be of further assistance to you in your deliberations.

Sincerely,

[Signature]
William Miller  
Acting Dean

XC: Library Council members  
Paul Yon, Administrative Staff Welfare Committee  
Faculty Welfare Committee  
Dan Parratt
(A) As used in this section, "Place of public assembly" means:  
(1) Enclosed theaters, except the lobby; opera houses, auditoriums; classrooms; elevators; rooms in which persons are confined as a matter of health care, including but not limited to a hospital room and a room in a rest home serving as the residence of a person living in such rest home;  
(2) All buildings and other enclosed structures owned by the state, its agencies, or political subdivisions, including but not limited to hospitals and state institutions for the mentally retarded and the mentally ill; university and college buildings, except rooms within those buildings used primarily as the residences of students or other persons affiliated with the university or college; office buildings; libraries; museums; and vehicles used in public transportation. That portion of a building or other enclosed structure that is owned by the state, a state agency, or a political subdivision and that is used primarily as a food service establishment is not a place of public assembly.  
(3) Each portion of a building or enclosed structure that is not included in division (A) (1) or (A) (2) of this section is a place of public assembly if it has a seating capacity of fifty or more persons and is available to the public. Restaurants, food service establishments, dining rooms, cafes, cafeterias, or other rooms used primarily for the service of food, as well as bowling alleys and places licensed by the department of liquor control to sell intoxicating beverages for consumption on the premises, are not places of public assembly.  
(B) For the purpose of separating persons who smoke from persons who do not smoke for the comfort and health of persons not smoking, in every place of public assembly there shall be an area where smoking is not permitted, which shall be designated a no smoking area, provided that no more than one-half of the rooms in any health care facility in which persons are confined as a matter of health care may be designated as smoking areas in their entirety. The designation shall be made before the place of public assembly is made available to the public. In places included in division (A) (1) of this section, the local fire authority having jurisdiction shall designate the no smoking area. In places included in division (A) (2) of this section that are owned by the state or its agencies, except the statehouse, the director of administrative services shall designate the area, and if the place is owned by a political subdivision, its legislative authority shall designate an officer who shall designate the area. The house rules committee shall designate the no smoking areas in all statehouse spaces used by the house of representatives; the senate rules committee shall designate the no smoking areas in all statehouse spaces used by the senate, the legislative service commission, and the legislative reference bureau; the director of administrative services shall designate the no smoking areas in all other spaces in the statehouse. In places included in division (A) (3) of this section, the person having control of the operations of the place of public assembly shall designate the no smoking area. In places included in division (A) (2) of this section, the officer who has authority to designate the area in places licensed to sell intoxicating beverages for consumption on the premises shall designate the no smoking area. A no smoking area may include the entire place of public assembly. Designations shall be made by the placement of signs that are clearly visible and that state "no smoking." No person shall remove signs from areas designated as no smoking areas.  
(C) No person shall smoke in any area designated as a no smoking area in accordance with division (B) of this section.  
(D) Whoever violates this section is guilty of a minor misdemeanor.  
HISTORY: 132 v S 96 (Eff 8-31-76); 137 v S 212. E 8-17-77.

Research Aids  
Non-smoking areas; miscellaneous regulations:  
G-Jur3d: Blgs § 24

§ 3791.04 Submission of plans; approvals, prohibition; penalties.  
Before entering into contract for or beginning the construction, erection, or manufacture of any building to which section 3781.06 of the Revised Code is applicable, including all industrialized units, the owner thereof shall, in addition to any other submission of plans or drawings, specifications, and data required by law, submit the plans or drawings, specifications, and data prepared for the construction, erection, and equipment thereof, or the alteration thereof or addition thereto, which plans or drawings, and specifications shall indicate thereon the portions that have been approved pursuant to section 3781.12 of the Revised Code, for which no further approval shall be required, to the municipal, township, or county building department having jurisdiction if such department has been
MEMORANDUM

TO:    Susan Darrow
       Pat Fitzgerald
       Norma Stickler
       Paul Yon

FROM:  Susan Caldwell, Director
       Administrative Staff Personnel Services

October 15, 1985

Just a quick note to provide you with additional statistics on years of service of administrative staff. At our October 8 meeting, interest was expressed in knowing how many staff members have 0, 1, 2, 3, 4, or 5 years of service. I have prepared the following summary:

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Full-time Administrative Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>5 years</td>
<td>11</td>
</tr>
<tr>
<td>4 years</td>
<td>37</td>
</tr>
<tr>
<td>3 years</td>
<td>14</td>
</tr>
<tr>
<td>2 years</td>
<td>14</td>
</tr>
<tr>
<td>1 year</td>
<td>36</td>
</tr>
<tr>
<td>0 years</td>
<td>49</td>
</tr>
</tbody>
</table>

*These figures indicate that a full-time staff member has completed the number of years specified.

Please note that the service figures I prepared and distributed to you earlier included both full-time and part-time staff. I have adjusted the figures above to include only full-time staff since they are the only staff eligible for the dependent fee waiver. These statistics are based on July 1985 data; today there would probably be more staff in the "0 years" category.

In addition the average age of administrative staff members is roughly 38.5 years.

I hope you will find this information helpful. Let me know if I can provide any additional statistics.

SC:mmb
To: Paul Yon  
From: Pat Fitzgerald  
re: grievance policy change.

This little memo was dropped on us at the last exec meeting of the ASC. Greg and the committee officially referred it to the Welfare Committee for action. Will you please put it on the agenda for our next meeting.
To: President Olscamp

From: Phil Mason

Subject: Grievance & Hearing Procedures for Contract Staff

The grievance procedures contained in the contract staff handbook were reviewed during a recent discussion with Attorney Mattimoe. While it is not entirely clear, it appeared to Attorney Mattimoe that this procedure envisions that the hearing panel has authority to make the final decision in the grievance process. This would be in contrast to the faculty grievance procedure wherein the hearing panel can only make a recommendation.

Since it is known that the intent is not to give the hearing panel authority to make the final decision, my concern is not that we would be held to a decision which may be viewed as inappropriate rather my concern is that the policy as it is now written may create some confusion. Specifically, under Grievance and Hearing Procedures, Section II-E Resolution —

"The hearing panel will give written notice of its recommended disposition of the complaint..." Then under Section II-F — "The decision of the hearing panel may be appealed in writing within seven calendar days..." I hasten to reiterate that there should not be reason for serious concern but there may be potential for some misunderstanding; therefore, I recommend the following amendment to the contract staff handbook:

> (pp 16) Grievance and Hearing Procedures, Sections II-E and II-F

The Director of Affirmative Action will facilitate the process for resolution of the complaint and will insure that THE appropriate administrative action is taken ADMINISTRATOR MAKES A DECISION in a timely manner.

F. Appeal

The decision RECOMMENDATION of the hearing panel AND THE DECISION OF THE APPROPRIATE ADMINISTRATOR may be appealed in writing within seven calendar days of the decision, to the President of the University. The President (or designee) will respond in writing to all parties—complainant, respondent, chair of the hearing panel, Director of Affirmative action, and the appropriate vice president—concerning final disposition of the appeal within fourteen calendar days after receiving the appeal. The President's (or designee's) decision is final.

A copy of the Grievance and Hearing Procedures is attached for your convenience.

is

Attachment

"An Environment for Excellence"
MEMORANDUM

TO: Phil Mason
   Executive Assistant to the President

FROM: Gregg DeCrane
       Chair, Administrative Staff Council

DATE: November 5, 1985

SUBJECT: Grievance and Hearing Procedures for Contract Staff

As indicated in our earlier phone conversation, the Administrative Staff Council's Personnel Welfare Committee has been given your recommendation for a change in the Administrative Staff Handbook. I will keep you informed as to the actions of this committee in regards to the changes you proposed. The committee may wish to meet with you and if so chair Paul Yon will be in contact.

cc: Paul Yon

GD:dkh

MEM/68
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 STRS 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 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 _____ Married

Is spouse employed at BGCU? _____ Yes _____ No

If yes _____ Full-time _____ Part-time

If a dependent fee waiver had been available upon your employment at BGCU, 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
ADMINISTRATIVE STAFF COUNCIL

PERSONNEL WELFARE COMMITTEE REPORT

TUITION FEE WAIVER-DEPENDENTS

During the Fall Semester, 1964, 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 has the longest waiting period for employees (5 years) of any school examined.

No mandated waiting period:
- Akron
- Cincinnati
- Kent
- Medical College
- Ohio University
- Wright State
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 potential real costs 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 help move the enrollment ratio in the direction of 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 indicates 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 BSU more competitive with other state supported institutions, more specifically the University of Toledo.
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 Ohio supported institutions were contacted and asked to provide comparative data on the tuition fee waiver policy. The results of this survey are enclosed.

FINDINGS: Bowling Green State University has the longest waiting period for employees (45 years). Seven schools; Akron, Cincinnati, Kent, Medical College, Ohio University, Wright State, and Youngstown do not have mandatory waiting periods. Two schools have a one-year waiting period; Central State and University of Toledo. Three schools have a three-year waiting period; Cleveland State, Miami University, and Ohio State University.

The Personnel Welfare Committee also conducted a survey via questionnaire to those employees who have been employed less than five years. Eighty-two (42%) responded to the questionnaire. Twenty-four or (29%) indicated that they had been employed between three to five years. Nine respondents, 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.

RECOMMENDATIONS:

1. 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. [This would make DSU more competitive with the University of Toledo.]

RATIONALE: It is understood that potential real costs to the university is the loss of instructional fees. [However, if the University enrollment without these dependent students is less than the state mandated ceiling, this benefit increases University income through the generation of state subsidies.]
If university enrollment falls below the mandated level, increased tuition is generated by these dependent through guarantees. Security.

Based upon the many co-opuring of depentets who would take courses, would the graduates students a theory help more the excellent not in the direction of the theories: have this been staledet.
Dependent Fee Waiver
Questionnaire Responses
3-5 yrs. experience
responses=24/192  82/192
marital status- married -21
single 3
spouse employed at BGSU -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
ADMINISTRATIVE STAFF COUNCIL

PERSONNEL WELFARE COMMITTEE REPORT

TUITION FEE WAIVER-DEPENDENTS

During the Fall Semester, 1964 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 (13) Ohio supported institutions were contacted and asked to provide comparative data on the tuition fee waiver policy. The results of this survey are disclosed.

FINDINGS: Bowling Green State University has the longest waiting period for employees than any school canvassed, five years. Seven schools; Akron, Cincinnati, Kent, Medical College, Ohio University, Wright State, and Youngstown do not having mandatory waiting periods. Two schools have a one year waiting period; Central State and University of Toledo. Three schools have a three year waiting period; Cleveland State, Miami University, and Ohio State University.

The Personnel Welfare Committee also conducted a survey via questionnaire to those employees who have been employed less than five years (192). Eighty-two (42%) responded to the questionnaire. Twenty-four or (22%) indicated that they had been employed between three to five years. Nine respondents, 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.

RECOMMENDATIONS;

1. 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.

RATIONAL: 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. This would make BGSU more competitive with the University of Toledo.

RATIONAL: It is understood that potential real costs to the university is the loss of instructional fees. However, if the University enrollment without these dependant students is less than state mandated ceiling, this benefit increases University income through generation of state subsidies. To this committee knowledge no revenues have ever been lost due to dependants displaceing "cash paying" students.
<table>
<thead>
<tr>
<th>Year</th>
<th>FTE</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983-1984</td>
<td>360</td>
<td>300</td>
</tr>
<tr>
<td>1984-1985</td>
<td>315</td>
<td>500</td>
</tr>
<tr>
<td>1985-1986</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1125 students (non-resident)

Linda Hamilton

About 500
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 (13) Ohio supported institutions were contacted and asked to provide comparative data on the tuition fee waiver policy. The results of this survey are enclosed.

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The Personnel Welfare Committee also conducted a survey via questionnaire to those employees who have been employed less than five years (19%). Eighty-two (42%) responded to the questionnaire. Twenty-four or (29%) indicated that they had been employed between three to five years. Nine respondents, 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.

RECOMMENDATIONS:

1. 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. This would make BGSU more competitive with the University of Toledo.

RATIONALE: It is understood that potential real costs to the university is the loss of instructional fees. However, if the University enrollment without these dependent students is less than the state mandated ceiling, this benefit increases University income through the generation of state subsidies.
During the Fall Semester, 1984 the Administrative Staff Council's Personnel Welfare Committee was asked to review Bowling Green State University's vacation policy for non-academic contract employees in an effort to determine its position with other regional and in-state publicly supported universities. With the assistance of the Office of Administrative Staff Services, more specifically Susan Caldwell, ten Ohio supported universities, the Medical College of Ohio, and one Michigan university (Central Michigan) were contacted and asked to furnish data on current vacation policy for non-academic contract employees. Co-operating institutions were asked to address three areas of their vacation policy. These areas include: 1) the annual rate of accrual, 2) the maximum accrual, and 3) the number of vacation days paid at termination.

The vacation policy for contract/non-academic staff has been extensively discussed for decades. These discussions are reflected in the minutes of the Personnel Services Advisory Committee. President Ralph McDonald, in a memorandum sent to university employees/administrators on 4 May 1975 set the total number of vacation days for "other Full-time Twelve-months employees" at twenty days. Later, on 20 March 1973 the Personnel Services Advisory Committee recommended to President Moore and Vice President J.J. Scheuerman changes in the Administrative Staff's vacation/sick/and leave of absence policy. In short, the recommendation called for an increase in vacation days based on the number of years of service. This recommendation was to be submitted to the Board of Trustees for their consideration at the following April or May meeting; however, it apparently died in committee. Later, in 1981 the Personnel Services Advisory Committee again addressed vacation benefits for Administrative Staff. The committee again recommended that vacation for the abovementioned staff be based upon longevity or "at least grant five (5) weeks vacation to those employees who have completed twenty-five (25) years of service." This time the committee also addressed the question of maximum vacation accrual. They recommended that the total number of weeks accrual should be determined by the total number of years of service (enclosed). Again, no apparent action was taken.

As of February 1986 all full-time twelve-month administrative staff earn vacation time at the rate of twenty days (20) for each year of service. A maximum of forty days of vacation may be accumulated at any one time. The maximum amount of vacation days that will be paid at termination/death is forty (40). (The current policy, as indicated in the 1985-86 Administrative Handbook, is included.)

Findings: ANNUAL RATE OF ACCRUAL. At 20 days vacation, BGSU ranks in the lower thirty percent (30%) behind the University of Toledo (24), Akron (22), Cincinnati (22), Cleveland State (22), Miami (22), Ohio State (22), Ohio University (22), Wright State (22), and Youngstown (22). Only BGSU, MCO, Central Michigan, and Kent State have an equal amount of days.
MAXIMUM ACCRUAL. At forty (40) days vacation, the BGSU position is in sixth place and shares that position with MCO and Miami University. Although five schools record fewer maximum accrual days; BGSU, nevertheless, trails the University of Toledo (72), Cincinnati (66), Kent State (60), Cleveland State (44), and Wright State (44) by as much as thirty-two (32) days.

PAYMENT AT TERMINATION. At forty (40) days vacation BGSU is tied for fifth with Miami University. However, BGSU continues to trail Cincinnati (66), Kent State (60), University of Toledo (48), and Wright State (44).

RECOMMENDATIONS:

1. That the annual rate of vacation accrual be increased from twenty (20) to twenty-four (24) days per year.

2. That the maximum accrual days be based on accumulative full-time years of service and be revised as follows:*  
   
   0-5 years of service 40 days  
   6-10 years of service 45 days  
   11-15 years of service 50 days  
   16-20 years of service 55 days  
   21-25 years of service 60 days  
   26+ years of service 65 days

3. That payment at retirement, termination, or death remain at forty (40) vacation days.

*No more than forty days vacation may be taken within a twelve consecutive month period.

JUSTIFICATION:

1. Typically, Administrative Staff work more than forty hours per week and do not receive overtime, compensatory time, or other paid benefits for these extra hours. A more generous vacation policy will help prevent professional "burnout" by allowing more flexibility in scheduling.

2. There will be no anticipated increased costs to the University.
3. Increasing the annual rate of accrual and the maximum accrual will coincide with the current University Role and Mission Statement by serving as an incentive to attract the most qualified administrative staff to assist with and support the attainment of the goals of productive research, quality education, and scholarly achievement.

4. By increasing the annual rate of accrual and the maximum accrual, BSU will be more competitive not only within the state but within Northwest Ohio, more specifically with the University of Toledo.

5. Increasing the maximum accrual would serve as a concrete way of rewarding and encouraging administrative staff who have been employed at BSU for more than five years, as well as those employed less than five years (196 or 54%). It would strengthen the employee’s commitment, increase morale, and serve as a long term incentive in those who have become more valuable with experience. It also may serve to reduce the amount of administrative staff turnover, which is currently 11.08 percent per year.

It is proposed that the policy be implemented on 1 July 1986. This policy also would be applicable to employees who have accrued vacation during 1985-1986.
UNIVERSITY POLICY ON VACATIONS

1. The amount of vacation time for each employee shall be computed by the administrative officer of the department in which he is employed, on the following basis:

Group I. Members of the teaching faculty. Employees whose duties consist primarily of teaching have approximately three weeks of vacation time available during the Thanksgiving, Christmas, and spring holiday recesses in the academic year.

Group II. Classified employees. This category includes all Civil Service workers and all local employees engaged in the same kind of work as classified employees under State Civil Service law. Each employee in this group is entitled to vacation time of two calendar weeks a year, in addition to legal holidays. Employees who have less than one year of service are entitled to one working day of vacation leave for each month of service during the calendar year.

Group III. Other full-time twelve-months employees. This category includes all year-round employees of the University who are working on a full-time basis, other than teaching faculty members and classified employees.

Subgroup A. Administrative officers, head residents of University residence halls, librarians with faculty rank, managers of University dining halls, and all other specifically designated professional personnel whose regular duties involve varied and extended overtime service without added compensation. Each employee in this group is entitled to four calendar weeks of vacation a year, in addition to legal holidays.

Subgroup B. Other employees in Group III. Each person in this subgroup is entitled to two weeks of vacation a year, in addition to legal holidays.

Group IV. Persons employed on a full-time basis for less than one year. A person in this category is entitled to a portion of the full year's vacation leave corresponding to the portion of the calendar year he is employed. For example, a person employed full time for ten months is entitled to ten-twelfths of the regular yearly vacation allowance made for persons doing the same kind of work on a year-round basis.

Group V. Persons employed on a per-diem basis. An employee in this category is entitled to one day of vacation leave for each 24 days worked.
Group VI. Persons employed on an hourly basis. One day of vacation leave is granted for each 192 hours worked by such an employee; provided, however, that the total vacation leave for such employee shall not exceed two calendar weeks during the year.

3. The vacation year for employees in Groups III and IV shall be from September 1 through the following August 31. The vacation year for employees in Groups II, V, and VI shall be from January 1 through December 31.

3. Vacation time earned during the vacation year shall be taken by the employee during that year; such vacation time is not cumulative from one vacation year to the next. The justification for paid vacations lies in the fact that the quality of service to the University is enhanced as a result of the employee's rest and relaxation. Therefore, administrative officers shall insist upon each employee taking a vacation leave during the vacation year as indicated above. Exceptions to this policy shall be made only with the specific approval of the President of the University.

4. The vacation dates for an employee shall be determined by the administrative officer in charge of the department in which he is employed, subject to approval by Mr. Bunn for all persons employed in departments under his supervision, and subject to the approval of Dean Harshman for all employees in other University departments except the President's Office.

5. The administrative officer shall arrange for the vacation of each employee at a time when the employee's absence involves least interference with the work of the department in which he is employed. Ordinarily, vacation leave for persons employed in departments other than Maintenance shall be taken during the period from June 1 to September 1 or during the Christmas and spring recess periods. Exceptions to this policy of concentrating vacations in the summer months and academic recess periods shall be made only with the specific approval of the President of the University.

6. Vacation schedules for all employees shall be determined as far in advance as possible. All vacations to be taken by present employees before September 1, 1955, shall be planned and approved before June 1, 1955.

7. Administrative officers shall transmit duplicate copies of vacation schedules for all employees under their supervision by June 6, 1955, to Messrs. Bunn and Harshman, who will in turn approve and transmit one set of copies of such schedules to the Business Office. These schedules should show also the number of vacation days each employee has already taken during his current vacation year.

8. Any employee wishing to have his pay check delivered to him in other than the usual manner during his vacation leave shall transmit such request through his supervising administrative officer at the time his vacation leave is approved.
5. For each legal holiday officially set aside by the University occurring during an employee's vacation period, one day shall be added to his total vacation leave.

10. The regular recesses in the academic calendar—Thanksgiving, Christmas, spring holidays, etc.—are vacation time for teaching staff members only. Time taken off by other employees during such periods shall be counted as a part of their regular vacation allowances.

11. An employee of the University shall be fully compensated at his regular rate of pay for all vacation time taken in accordance with the policies set forth in the preceding paragraphs.

April 18, 1955

Ralph W. McDonald
President
UNIVERSITY POLICY ON VACATIONS

The following amendments and interpretations are supplementary to the basic policy as outlined in the memorandum of April 12, 1955.

1. "Two weeks of vacation" is intended to mean twelve working days; "three weeks" is intended to mean eighteen working days; "four weeks" is intended to mean twenty-four working days. Since the University has a five-and-one-half day working week, this means that a person with two weeks of vacation would have one additional day of vacation beyond two calendar weeks; that a person with four weeks of vacation would have two additional vacation days beyond four calendar weeks.

2. Employees in Group II, ordinarily entitled to two calendar weeks of vacation a year, shall be entitled to three weeks of vacation a year after twelve years of full-time service in the University (or after a total of fifteen years of full-time employment by the State of Ohio, including service in other State agencies as well as in the University).

3. An employee in Group II, V, or VI, whose vacation year is from January 1 through December 31, may take his vacation anytime during that year or anytime up to the following September 15, if the administrative officer in charge wishes to make such an arrangement.

4. An employee in Group III or IV, whose vacation year is from September 1 through August 31, may take his vacation during that year or up through the following September 15, if the administrative officer in charge wishes to make that arrangement.

5. In any individual case where unusual circumstances, previous commitment, the welfare of the University program, or personal hardship may indicate the desirability of a more flexible arrangement regarding vacation, the administrative officer in charge shall indicate the circumstances in a memorandum to the President and request approval for an appropriate adjustment. Any reasonable adjustment will be carefully considered, and all such adjustments that are in general accord with the broad intent of the University vacation policy will be approved. Specific approval by the President's office of each such exception is necessary, however, in order that practices throughout the many departments of the University may be reasonably comparable and adequate records maintained regarding all exceptions.

Ralph W. McDonald  
President  
May 4, 1955
MEMORANDUM

TO: Dr. Hollis A. Moore  
Mr. J. C. Scheuerman

FROM: Personnel Services Advisory Committee

SUBJECT: Recommended Policies for Vacation, Sick Leave and Leave of Absence

On October 26, 1973, the Personnel Services Advisory Committee was appointed by the President to establish several policies and procedures for unclassified employees (contract, non-academic). The minutes of all committee meetings to date have been forwarded to your office, including recommendations concerning insurance and other benefits.

Attached herewith are three additional recommendations:

1. Vacation policy
2. Sick Leave policy
3. Leave of Absence policy

The following notes may provide helpful background information:

1. In keeping with the Affirmative Action Program, these recommendations are in general agreement with those presently applicable to classified employees.

2. It is assumed that because of the nature of contract responsibilities, most contract employees will work considerably more than an average 40-hour work week. In recognition thereof, for many years the minimum vacation earned has been four weeks per year.

3. Until recently, all classified employees received only two weeks of vacation, regardless of the number of years of service. However, in accordance with recent changes in the state law, classified employees now receive three weeks of vacation after ten (10) years of service, and four weeks of vacation after twenty (20) years.

4. Therefore, it is also recommended that contract employees earn vacation based upon similar years of service at BGSU as proposed in the vacation policy.
If your office (or others) desires additional information, please advise. The current vacation policy was adopted in 1955 (copy attached); however, it was not approved by the Board of Trustees (verified by Dr. McFall's office).

Committee Members:

F. E. Beatty  
Roy Clark  
Paul R. Nusser  
John D. Hayes  
Ray Malone  
Robert McKay  
Carol Payne  
Richard Stoner  
Marilyn Shepherd  
Ray Whittaker  
Charles Gallagher, Ex Officio  
Elton Ringer, Chairman
RECOMMENDED VACATION POLICY FOR NON-ACADEMIC CONTRACT EMPLOYEES

All full-time, twelve-month, non-academic contract employees earn annual vacation in accordance with the following schedule:

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Vacation Per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year of service</td>
<td>No Vacation*</td>
</tr>
<tr>
<td>One year, but less than 10 years</td>
<td>20 work days</td>
</tr>
<tr>
<td>Ten years, but less than 20 years</td>
<td>25 work days</td>
</tr>
<tr>
<td>Twenty years or more</td>
<td>30 work days</td>
</tr>
</tbody>
</table>

*Employees with less than 1 year of service may take (borrow) 5 days vacation after each three months of service. However, if an employee terminates employment before completing one year of service, his/her termination check shall be reduced by the amount of vacation taken.

Employees are expected to utilize their vacation annually and at a time approved by the area supervisor. Absences chargeable to vacation are to be reported to the employee’s area administrator (or his designee) who will maintain vacation records.

Vacation is computed from initial date of employment. Accumulated vacation up to a total of that earned in two years may be carried into a new contract year. Upon termination of employment, compensation for accrued vacation will be paid in a lump sum.

If an employee has interrupted service with the University (other state agencies excluded), his/her prior full-time employment period with the University shall be counted for determination of vacation earned.

Days designated as holidays shall not be charged against vacation.

Vacation is earned while an employee is on an active pay status; it is not earned while on unpaid leave of absence.

Vacation pay is not granted in lieu of vacation except at termination of employment.
In case of death, unused vacation will be paid in accordance with Section 2113.04 of the Ohio Revised Code.

This policy excludes Medical Doctors, Residence Hall Directors, Housemothers and other employees whose contract period is for less than twelve months inasmuch as they have time off with pay during shut-down periods between quarters, holidays, or summer.
VACATION BENEFITS
(Detailed in Separate Exhibit)

Classified Employees.

Vacation benefits for classified employees are determined by the State. Vacation is earned on the basis of longevity, with a maximum of 5 weeks upon completion of 25 years of service:

- 1 - 7 Years: 2 Weeks
- 8 - 14 Years: 3 Weeks
- 15 - 24 Years: 4 Weeks
- 25 Years and Over: 5 Weeks

Contract Employees.

Contract employees receive 4 weeks of vacation, regardless of longevity; however, Library employees receive several additional days of vacation.

The Personnel Services Advisory Committee recommended that contract employees should also earn vacation based upon longevity—or to at least grant 5 weeks to those completing 25 years of service (which would be consistent with the classified policy). To avoid possible inequities, perhaps the 5 weeks policy and the Library differential should be reviewed again.

Maximum Vacation Accrual.

Similarly, the maximum vacation accrual is considerably more liberal for classified employees (a maximum of 15 weeks after 25 years of service—as listed below), as compared with 4 weeks beyond one’s anniversary date for all contract employees regardless of the number of years of service:

- 1 - 7 Years: 6 Weeks
- 8 - 14 Years: 9 Weeks
- 15 - 24 Years: 12 Weeks
- 25 Years and Over: 15 Weeks

To partially close the differential, perhaps after 15 years (or 25 years), contract employees might be given an additional 4 weeks of accrual.
VACATION POLICY (Current)

All full-time, twelve-month, administrative staff members earn vacation time at the rate of twenty days for each year of service. During the first year of employment, the twenty days are accrued but may not be used until the first year's employment is completed. For example, if employment begins on July 1, 1982, the employee would be eligible to take twenty days of vacation on July 1, 1983 -- but not before. After the first year of employment, vacation is earned and may be utilized on a monthly pro-rata basis, i.e., 1 2/3 days per month. Records of vacation should be maintained by the staff member's supervisor or a designee on a monthly basis, with accrual, use and balance noted.

Vacation is earned while a staff member is in an active-pay-status with Bowling Green State University. It is not earned while on an unpaid leave of absence or while employed elsewhere.

Staff members are expected to utilize their vacation annually and at a time approved by the area supervisor. A maximum of forty days for vacation may be accumulated at any one time. It is expected, however, that no single vacation leave taken will exceed 20 consecutive working days unless approved in advance by the supervisor.

For the convenience of scheduling vacations at the most appropriate time, area supervisors with the approval of the President, Dean, or a Vice President, may authorize vacation leave in advance of accumulated leave, provided that should the staff member terminate employment, the termination check shall be reduced by the amount of used but unearned vacation.

Vacation pay is not granted in lieu of vacation except at termination of employment and such terminal compensation will be paid in a lump sum. The maximum amount of terminal compensation will be forty days. In case of death, unused vacation will be paid in accordance with Section 2112.04 of the Ohio Revised Code.

This policy excludes medical doctors, residence hall directors, unit directors, and employees whose contract period is for less than twelve months and who have time off with pay during academic recess between semesters, during breaks, holidays, or summer. Administrative staff members who are contracted for 12 months but who work only part of each week earn vacation on a prorated basis. For example, an employee contracted to work fifty-percent for 12 months and works part of each week, earns vacation at one-half the normal rate. Part-time 12-month administrative staff members who have completed the equivalent of one full year of service at Bowling Green State University are eligible to utilize earned vacation. At the time of separation from employment with the University, part-time administrative staff are not eligible for payment of unused vacation credit.

The President or Vice Presidents shall be responsible for implementing this policy, for authorizing modifications for unusual circumstances, and for establishing procedures for the maintenance of current vacation leave records.

At the end of each fiscal year, every staff member will submit to Administrative Staff Personnel Services a form approved by the immediate supervisor summarizing vacation use, accrual, and balance for July-December and January-June for that year. That form is placed in the staff member's personnel file located in the Office of Administrative Staff Personnel Services.

Questions about the vacation policy and procedures should be addressed to the Office of Administrative Staff Personnel Services.
### ANNUAL RATE OF ACCRUAL
(Thirteen Schools Examined)

<table>
<thead>
<tr>
<th>Days</th>
<th>School Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>22</td>
<td>Akron, Cincinnati, Cleveland, Miami, Ohio State, Ohio University, Wright State, Youngstown</td>
</tr>
<tr>
<td>20</td>
<td>BGSU, Central Michigan, Kent (25 days after 25 yrs), Medical College of Ohio</td>
</tr>
</tbody>
</table>

### MAXIMUM ACCRUAL
(Thirteen Schools Examined)

<table>
<thead>
<tr>
<th>Days</th>
<th>School Name</th>
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<tbody>
<tr>
<td>72</td>
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<tr>
<td>66</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>60</td>
<td>Kent State University</td>
</tr>
<tr>
<td>44</td>
<td>Cleveland State, Wright State</td>
</tr>
<tr>
<td>40</td>
<td>BGSU, Medical College of Ohio, Miami University</td>
</tr>
<tr>
<td>33</td>
<td>Ohio University, Youngstown</td>
</tr>
<tr>
<td>30</td>
<td>Ohio State University</td>
</tr>
<tr>
<td>22</td>
<td>Akron University</td>
</tr>
<tr>
<td>20</td>
<td>Central Michigan</td>
</tr>
</tbody>
</table>
**PAYMENT AT TERMINATION**  
*(Thirteen Schools Examined)*

<table>
<thead>
<tr>
<th>Days</th>
<th>Number</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>66</td>
<td>1</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>60</td>
<td>1</td>
<td>Kent State</td>
</tr>
<tr>
<td>48</td>
<td>1</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>44</td>
<td>1</td>
<td>Wright State</td>
</tr>
<tr>
<td>40</td>
<td>2</td>
<td>BGSU, Miami</td>
</tr>
<tr>
<td>30</td>
<td>2</td>
<td>Ohio University, Ohio State University</td>
</tr>
<tr>
<td>22</td>
<td>2</td>
<td>Akron, Cleveland State</td>
</tr>
<tr>
<td>20</td>
<td>2</td>
<td>Central Michigan, Medical College of Ohio</td>
</tr>
<tr>
<td>0</td>
<td>1</td>
<td>Youngstown (extend termination date)</td>
</tr>
<tr>
<td></td>
<td>BGSU</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td>Dep</td>
<td>Emp</td>
</tr>
<tr>
<td>1.</td>
<td>Dependents &amp; employees</td>
<td>Yes</td>
</tr>
<tr>
<td>2.</td>
<td>What is waiting period</td>
<td>5 yrs-F/T</td>
</tr>
<tr>
<td>3.</td>
<td>What is benefit (# courses)</td>
<td>Can be F/T Students</td>
</tr>
<tr>
<td>4.</td>
<td>Is there reciprocity?</td>
<td>No</td>
</tr>
<tr>
<td>5.</td>
<td>How much does the University pay?</td>
<td>Instruc. Fees</td>
</tr>
<tr>
<td>6.</td>
<td>Are F/T, P/T Staff covered?</td>
<td>F/T</td>
</tr>
<tr>
<td>7.</td>
<td>Is coverage for graduate and undergraduate courses?</td>
<td>Yes, if Dependent</td>
</tr>
</tbody>
</table>

TUITION FEE WAIVER
<table>
<thead>
<tr>
<th></th>
<th>TOLEDO</th>
<th>OHIO U.</th>
<th>NCOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Dependents &amp; employees</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>2. What is waiting period</td>
<td>Immediate</td>
<td>Immediate</td>
<td>Immediate</td>
</tr>
<tr>
<td>3. What is benefit (# courses)</td>
<td>Children 6 hr/qtr</td>
<td>Can be F/T Job related</td>
<td>Up to $1500 75% 1st course</td>
</tr>
<tr>
<td>4. Is there reciprocity?</td>
<td>No</td>
<td>Yes-BG</td>
<td>No</td>
</tr>
<tr>
<td>5. How much does the University pay?</td>
<td>Children/100%</td>
<td>100% Instruc.</td>
<td>No. Gen Fee</td>
</tr>
<tr>
<td>6. Are F/T, P/T Staff covered?</td>
<td>F/T</td>
<td>F/T</td>
<td>F/T</td>
</tr>
<tr>
<td></td>
<td>P/T 50%</td>
<td>P/T 1/2 time</td>
<td>F/T Prorated</td>
</tr>
<tr>
<td>7. Is coverage for graduate and</td>
<td>No grad. Courses</td>
<td>Both</td>
<td>Both</td>
</tr>
<tr>
<td>undergradate courses?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MEMORANDUM

TO: Gregg DeCrane, Chair
   Administrative Staff Council

FROM: Susan Caldwell, Director
   Administrative Staff Personnel Services

SUBJ: Turnover Statistics

Gregg: As you requested, I have completed a brief review of turnover statistics for administrative staff at BGSU and other state universities for the fiscal year 1984-85. For the purpose of this study, turnover is based on the number of resignations over the period July 1, 1984 - June 30, 1985 as a percent of total staffing. Only full-time administrative staff were included. Retirements, because they typically represent a "reason for leaving" different from a resignation, were not included. Using exit interview files maintained in this office and personnel changes reported to the Board of Trustees, I have recorded 37 resignations for 1984-85 and an approximate total full-time administrative staff of 335. This represents an 11.08% turnover rate. This figure differs from the 33% turnover rate reported in the minutes of the October 3 ASC meeting. I believe this higher figure represents the total number of new administrative staff hired between August 1984 and August 1985. There are several possible reasons for the difference between this figure and the turnover rate of 11.08% which I have calculated:

1. The reporting periods were different. The 33% was probably based on the 13-month period August 1, 1984 - August 31, 1985. The 11.08% was based on the 12-month period July 1, 1984 - June 30, 1985.

2. New administrative staff members counted in the 33% figure include those replacing vacancies created by resignations or retirement, those filling newly created positions, and those changing from classified to contract status. Only resignations were counted in the 11.08%.

3. Both part-time and full-time staff were included in the 33% figure, while only full-time staff were counted in the 11.08% figure.

I hope this clarifies the difference in these two statistics. It is my belief that 11.08% represents the true turnover rate based on resignations from the University.
In a telephone survey of the other state universities in Ohio, I requested similar turnover information for their administrative staff members. The following table summarizes the results:

<table>
<thead>
<tr>
<th>University</th>
<th>Approximate # F/T Staff</th>
<th>1984-85 Turnover Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Akron</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>BGSU</td>
<td>335</td>
<td>11.05%</td>
</tr>
<tr>
<td>Central State</td>
<td>114</td>
<td>20%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>250</td>
<td>11.6%</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>1,285</td>
<td>11%</td>
</tr>
<tr>
<td>Kent</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>Medical College</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>Miami</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>Ohio State</td>
<td>no response to survey</td>
<td></td>
</tr>
<tr>
<td>Ohio University</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>Toledo</td>
<td>160</td>
<td>9%</td>
</tr>
<tr>
<td>Wright State</td>
<td>no statistics maintained</td>
<td></td>
</tr>
<tr>
<td>Youngstown</td>
<td>no statistics maintained</td>
<td></td>
</tr>
</tbody>
</table>

As you can see, many schools do not maintain statistics on turnover and were not able to retrieve such information for me. In addition, turnover did not appear to be a concern to them. Four universities shared turnover rate information with me -- Cleveland, Cincinnati, and Toledo were close to our rate, while Central was much higher. Although not an exhaustive study, I think this information indicates that our turnover statistics are within the norm. Please let me know if I can provide you with any further clarification or assistance on this subject.

SC:mmb
MEMORANDUM

TO: Gregg DeCrane, Chair
Administrative Staff Council

FROM: Susan Caldwell, Director
Administrative Staff Personnel Services

SUBJ: Demographic Statistics on Administrative Staff

Gregg: As you requested, I have compiled the following statistics on the demographic profile of administrative staff.

AGE: Average age is approximately 33.5 years

SEX: Full-time - 192 male 165 female
Part-time - 7 male 21 female

(These statistics are based on staffing as of 11-18-85)

MARITAL STATUS: Full-time - 229 married 108 single
Part-time - 22 married 4 single

(These statistics are based on a report dated 7-24-85)

INSURANCE COVERAGE: Full-time only

Hospitalization - 125 family 197 single
Major Medical - 130 family 191 single
Surgical - 206 family 116 single

29 administrative staff members have waived insurance because they are covered by the family plan of a spouse who is either faculty, administrative staff, or classified staff at BGSU (12 male, 16 female)

Number of dependent children claimed for insurance purposes:

1 child - 73 staff
2 children - 66 staff
3 children - 26 staff
4 children - 3 staff

(These statistics are based on Insurance Office records reviewed 11-27-85)
Because these statistics are based on different reports generated at different times over the past several months, total staff figures differ. It is probably more relevant to compare the relative percentage of total staff in each category, instead of the actual numbers.

Under the insurance program, the University pays the premium for single coverage for hospitalization and major medical; and it pays the family coverage for the surgical benefit. Therefore, more staff enroll in the family coverage for surgical benefits than for hospitalization and major medical. Spouses working outside the University may have family hospitalization and major medical coverage so the BGSU staff member does not have to pay for it.

The statistics on dependent children includes only the number of children presently claimed for insurance purposes, and not necessarily the total number of children the staff member has.

I hope these statistics will be helpful to you. Please let me know if you need additional information.

SC:mmb
xc: Diane Shamp
Merit and Across-the-Board Increases for New Administrative Staff

Each year salary increases for University-funded administrative staff include merit and across-the-board increase components. Continuing University-funded full-time and part-time staff members on fiscal or academic year contracts with more than one calendar year of service are eligible for consideration for both an across-the-board percentage increase and a merit increase. Those staff members employed for one calendar year or less will be considered for increases as follows:

1. Across-the-board increases will be pro-rated to the nearest complete month of service. e.g. a person with 7 1/2 months of service would receive 7/12ths of the percentage increase.

2. Meritorious work can occur regardless of the length of time an employee has been working for the University and thus could be awarded regardless of length of employment. However, because due evaluation of employees is part of recommendations for merit, it is highly unlikely that an employee who has been employed less than six months would qualify for merit increase.
Met with Deb Heineman and Deb McLaughlin concerning what would be needed and appropriate for maternity benefits. Their suggestions are as follows:

Susan Caldwell in her capacity as director of Administrative Staff Personnel Services should conduct orientation sessions for newly hired administrative staff members four times a year. The purpose of such sessions would be to inform staff members on their benefit package.

The administrative staff maternity benefits should parallel those of the classified staff at Bowling Green State University with the addition of a six week minimum leave for maternity and a four month leave being customary and usual. They also suggested that the University cover insurance benefits during such maternity leaves (In most cases, the insurance is already covered since the employee is using sick leave and vacation - it's a case in which the University can look like they are being nice but, in fact, it costs very little.) Whether or not the full four months are taken should be up to the employee, not her supervisor.

We did not know what to do with the paternity area -- whether both parents should be allowed to take maternity/paternity leave. Adoption should read the same as maternity.

Within the four month "usual and customary" leave, no physician verification should be needed. That should be reserved for the exceptions to the normal pregnancy, childbirth (either natural or C-section) and to the normal, healthy baby(ies) in which the woman needs addition time past the four month leave.

The time that a woman intends to take for maternity leave should be decided, unless the pregnancy becomes something other than normal, before the leave is started. Such intentions should be in writing and the agreement signed by the employee and supervisor.
MEMORANDUM

TO: Gregg DeCrane, Chair
    Administrative Staff Council

FROM: Susan Caldwell, Director
    Administrative Staff Personnel Services

SUBJ: University Budget Process

Gregg: As you are aware, the University is well into the budget planning process for 1986-87 through 1988-89. It is my understanding that each of the staff representative councils (Faculty Senate, Administrative Staff Council and Classified Staff Council) may, if they so choose, present annual salary increase recommendations for their respective constituencies to the University Budget Committee and the Faculty Senate Budget Committee. If the Administrative Staff Council should choose to make such a recommendation for next year's salary increase pool, it should be made in writing to the two budget committees.

This question arose recently from the Classified Staff Council. Dick Rehmer and I conferred with Phil Mason concerning the process outlined above. I wanted to make sure that the Administrative Staff Council is aware that this avenue of representation is available. If you decide to prepare any recommendations, I suggest that you contact Chris Dalton, Chair of the Faculty Senate Budget Committee, and Betsy Clark, Chair of the University Budget Committee, for assistance.

SC:mmb.
xc: Dr. Eloise Clark
    Dr. Christopher Dalton
December 11, 1985

MEMORANDUM

TO: Sharon Stuart, Chair, Classified Staff Council
Greg DeCrane, Chair, Administrative Staff Council
Donald Boren, Chair, Faculty Senate

SUBJECT: Toledo Industrial Recreation and Employee Services Council (T.I.R.E.S.)

For your information, Administrative Council has approved complete participation
in the T.I.R.E.S. Program.

The purpose of the above referenced organization is to bring together representa-
tives of business and professional organizations within a specific geographical
areas to organize, promote, and administer employee services and recreational ac-
tivities for the employees of the represented organizations.

In accordance with the philosophy of T.I.R.E.S. member and non-member organi-
izations, on a continuing or sporadic basis, offer discounts of their products or
services. While the number of participants and discounts available are quite
lengthy, the following information relates in a small way what is available.
However, we do have a T.I.R.E.S. promotional booklet in our office for all em-
ployees to review. A sample of the discounts are as follows:

- Big Country Floor and Wall Covering - 15% discount
- George Bellas Buick - $150 discount over dealer cost on new cars
- E.B. Brown Optical - 15% discount on all eye wear
- Brown Pontiac-Honda-Merde - $125 over dealer invoice on new cars
- Charlie's Dodge - $125 over dealer invoice on new cars and trucks
- Christopher Chrysler - $100 over cost on new trucks
- Hickory Farms - Discounts
- Paine-Webber - Discount on commissions over $45
- Tire Man Auto Centers - 10% off regular price on tires
- Torrance Alert & Security - 15% off on home and business alarms
- Will Fram It - 10% off on custom picture framing
- Lee Winters Florist - 10% discount
- Carpet Connection - 10% discount
- City Auto Radiator Company - 10% discount
- Vin Devers Dodge - $75 over dealer cost
- Dyanlite Corp. - 10% discount

In supporting participation in T.I.R.E.S., Personnel Support Services has set
forth the following guidelines:

1) The University will disclaim any relationship to any agreement
between any staff member and a T.I.R.E.S. sponsor.

An Equal Employment - Affirmative Action Employer
2) The University will not endorse any product or services rendered by T.I.R.E.S. or its members.

3) The promotional booklet explaining products and services is available only in Personnel Support Services.

4) Staff members should use either their University ID or Insurance ID for identification to participating members of T.I.R.E.S.

Richard J. Rehner
Director, Personnel Support Services

xc: A.I. Milliron
    Karl Vogt
    Marcia Sweeney
MEMORANDUM

TO: All Faculty & Staff (Full-Time & Part-Time)

FROM: Richard R. Eakin
Vice President for
Planning and Budgeting

SUBJ: TAXING OF GRADUATE FEE WAIVERS

In accordance with Section 117 of the Internal Revenue Code, which became effective July 1, 1985, the University is required to report as taxable compensation all graduate level tuition reductions (fee waivers) made on behalf of an employee, an employee's spouse or other dependents. The IRS Code provides an exception to this reporting requirement for calendar year 1985 when the fees waived for graduate students are related to teaching or research. Thus, Graduate Assistants, Research Assistants, Teaching Fellows, and Research Fellows are not affected in 1985 by this requirement. Non-Service Fellowships also are not subject to this requirement.

The 1985 Form W-2, to be issued in January 1986, will include this additional reportable compensation, if applicable, for the current Fall semester. This reportable compensation will result in additional taxes (Federal, State and City) for 1985; it will not be subject to State retirement contributions.

Employees for whom additional compensation is to be reported on the 1985 Form W-2 will receive a report prior to December 31, 1985 of the amount of fee waiver compensation to be included.

Early in 1986, additional information will be provided to all employees relative to tax implications of fee waivers received for enrollments in calendar year 1986.

RRE:slf
January 13, 1986

MEMORANDUM

TO: Richard L. Conrad

FROM: Rich Zera

SUBJECT: Administrative Staff Council Proposal

The purpose of this memorandum is to question the proposed policy on "Merit and Across-the-Board Increases for New Administrative Staff" being circulated for comments.

The proposed policy itself is not a major issue; the timing of its implementation, should it be passed, is of great concern. Specifically, I recently hired a new Systems Analyst before the end of the calendar year 1985, with the assumption that the practice of full allocation of across-the-board and merit increases for employees hired before 1/1/86 would be in effect. I would find it most distressing if the discussions I had with the employee as part of the contract negotiations, as well as my own budgetary planning, were superseded by a new policy.

If the proposed policy is adopted by the Administrative Staff Council, I strongly encourage a provision to exempt employees hired in 1985 from its coverage. To change the rules under which an employee was hired would be inconsistent with ethical hiring practices.

Thank you for your consideration.
January 17, 1986

Susan Caldwell, Director
Administrative Staff Personnel Services
Campus

Dear Susan,

I acknowledge receipt of your request for a new position description and will do my best to meet your February 28th deadline. I also acknowledge your reminder about administrative staff vacation records. In fact, it is the latter that prompts my writing to you.

You may recall my phone call to you in which I questioned the interpretation of the limit of the accrual of 40 days vacation on a monthly basis: "the maximum vacation that can be accumulated in any month is 40 days" as you phrased it in your Jan. 13th memorandum. I still do not know the source of this monthly interpretation or when it was instituted. My own understanding of the policy was based on a yearly rather than on a monthly basis. Indeed, my understanding of the policy was reinforced further when I neglectfully amassed 45 1/2 vacation days in 1983 and my supervisor, Dean Baker had to reduce the total by 5 1/2 days in order to comply with university policies. This seemed proper at the time, and I was in agreement with and sympathetic to his having to reduce the total from 45 1/2 to 40. Dean Baker is the kind of person who wants to do the right thing, and I respect him for that. Please note, however, that Dean Baker's interpretation was also based on the yearly interpretation of vacation accrual, and to my knowledge, we have been following this ever since. I enclose a copy of his memorandum for your information.

It is on this basis that I am formally requesting the return of 3 1/3 vacation days to my vacation balance for the months of March and April of 1984-85. I enclose xerox copies of work sheets for your information. Please forward this request to the person with the authority to review and grant this request.

A related issue is that I, as well as a number of other staff personnel I am sure, also teach classes. I taught a seminar last fall, and I am also teaching one this spring. These duties, along with summer pre-registration advising and other yearly responsibilities, make the "window of opportunity" to take time off before the monthly balance reaches 40 days small. Indeed, my ability to adhere to the monthly interpretation of vacation accrual is remote, if not impossible. I would like this issue brought up at the Administrative Staff Council, because I am sure there may be others who share my concerns who have been with the university as long as I have.

I would sincerely appreciate any help (relief?) you can provide me in these matters. Please let me assure you that it is not my intention to become rich in vacation time at the university's expense. On the other hand, I do not want to keep losing vacation days because the timing of what I do throughout the year is at variance with the accounting procedures, either.

Sincerely,

G. Lee Caldwell

xc: Dean Baker

"An Environment for Excellence"
January 24, 1986

MEMORANDUM

TO: Paul Yon
Archival Collections

FROM: Richard L. Conrad
University Computer Services

Concerning the Administrative Staff Handbook, please reference page 9, item 3; it appears to be an incomplete sentence.

Thank you.

sr

“An Environment for Excellence”
Recommendations from Faculty Welfare Committee on Faculty Benefits

Faculty Welfare Committee submits the following set of recommendations to Senate Executive Committee and to Faculty Senate. These recommendations deal with a subset of faculty benefit items from the recent report of the ad hoc Subcommittee on Fringe Benefits chaired by Dr. Darwin Close, which is attached. FWC recommendations on the other items in the report, which relate directly to health care or insurance, will be submitted later.

RECOMMENDATION 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.

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

The potential real cost to the university is the loss of instructional fees when a dependent student displaces a student who would otherwise pay all fees. Assuming 30 dependents of university employees in the fourth and fifth year of University employment take advantage of this new benefit, the anticipated potential cost could be approximately $50,000. However, if the University enrollment without these dependent students is less than the state-mandated ceiling, this benefit increases University income through generation of state subsidies. This latter factor may explain why there is no waiting period for receipt of this benefit at other state universities whose enrollments are below their mandated ceilings.

Suggested changes in the language of the Academic Charter for implementation of this Recommendation 1 and the following Recommendation 2 are attached.

RECOMMENDATION 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.

Rationale: This benefit will be helpful to faculty members seeking to improve skills or academic credentials, especially by allowing full course loads during summer terms when they have no other University obligations. The attached implementation language contains safeguards to prevent abusive use of this benefit. Increased course enrollments generated through this benefit should generate income to provide for any potential increase in cost.
GENERAL STATEMENT OF
AD HOC COMMITTEE ON FRINGE BENEFITS

It is the consensus of this committee that the following specific recommendations be considered within the context of the following general objectives.

1. This committee was not formed for the purpose of reducing or eliminating any of the benefits currently provided.

2. No current members of this faculty should suffer from any modification. (A person whose health would put him/her in an uninsurable category should not be required to give up life insurance, for example).

3. The approach of the committee was to insist on, encourage a collegial approach. Since it is impossible to balance precisely the value of a specific benefit to a specific person this committee endorses an attitude in which individual faculty members are encouraged not to seek strict parity relative to sex, age, marital status, etc. but to consider these benefits in light of the greatest good for the greatest number.

4. The emphasis on medical coverage must be to encourage preventive medical procedures. We refer to such activities as general campus promotion of healthful activities and specifically:

a. Provision for increased faculty and staff use of the recreational facilities of the university. Including simplification of procedures for use of the student rec center as a part of a deliberate health maintenance program.

b. The administration should schedule regular on-campus screening activities such as high blood pressure tests, Papp tests and rectal cancer tests.

c. The cost of regular (annual) health examinations should be covered in full.

Within this general framework this committee recommends the following changes to the current system. This listing is not meant to be considered as a recommendation of changes in a descending order of importance.

A. Parking - The ability to park within a reasonable distance of a person's place of employment is essential. The current system is rife with exception and special privilege and is totally inadequate. The administration must actively plan to develop additional new parking facilities.

B. Dependent fee waiver - It is suggested that the waiting period be reduced from five years to three.

C. There should be no limit on the number of courses which a faculty member is able to take without charge. (For example an off duty member should be able to take a full summer load).
MEMORANDUM

January 29, 1986

To: Donald Boren, Chair of Faculty Senate
    Faculty Senate Executive Committee

From: Faculty Welfare Committee
      Ron Stoner, Chair

Subject: Faculty Fringe-benefit Recommendations

The attached pages respond to your telephoned request for a set of recommendations from Faculty Welfare Committee (FWC) on selected items in the recent report of the ad hoc Subcommittee on Fringe Benefits (chaired by Darwin Close) -- namely those items that do not relate directly to health-care or insurance. We understand that you hope to place the remainder of the items (i.e. those that are related to health care and insurance) on the agenda of SEC and Faculty Senate at a later time, after receipt of a report from the Insurance Committee.

Also in accord with your request, we are providing statements of rationale and, where possible, estimated costs associated with the individual recommendations of the ad hoc Committee.

copies: FWC members
        Darwin Close
        Suzanne Crawford
Recommendations from Faculty Welfare Committee on Faculty Benefits

Faculty Welfare Committee submits the following set of recommendations to Senate Executive Committee and to Faculty Senate. These recommendations deal with a subset of faculty benefit items from the recent report of the ad hoc Subcommittee on Fringe Benefits chaired by Dr. Darwin Close, which is attached. FWC recommendations on the other items in the report, which relate directly to health care or insurance, will be submitted later.

RECOMMENDATION 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.

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

The potential real cost to the university is the loss of instructional fees when a dependent student displaces a student who would otherwise pay all fees. Assuming 30 dependents of university employees in the fourth and fifth year of University employment take advantage of this new benefit, the anticipated potential cost could be approximately $50,000. However, if the University enrollment without these dependent students is less than the state-mandated ceiling, this benefit increases University income through generation of state subsidies. This latter factor may explain why there is no waiting period for receipt of this benefit at other state universities whose enrollments are below their mandated ceilings.

Suggested changes in the language of the Academic Charter for implementation of this Recommendation 1 and the following Recommendation 2 are attached.

RECOMMENDATION 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.

Rationale: This benefit will be helpful to faculty members seeking to improve skills or academic credentials, especially by allowing full course loads during summer terms when they have no other University obligations. The attached implementation language contains safeguards to prevent abusive use of this benefit. Increased course enrollments generated through this benefit should generate income to provide for any potential increase in cost.
GENERAL STATEMENT OF
AD HOC COMMITTEE ON FRINGE BENEFITS

It is the consensus of this committee that the following specific recommendations be considered within the context of the following general objectives.

1. This committee was not formed for the purpose of reducing or eliminating any of the benefits currently provided.

2. No current members of this faculty should suffer from any modification. (A person whose health would put him/her in an uninsurable category should not be required to give up life insurance, for example).

3. The approach of the committee was to insist on/encourage a collegial approach. Since it is impossible to balance precisely the value of a specific benefit to a specific person this committee endorses an attitude in which individual faculty members are encouraged not to seek strict parity relative to sex, age, marital status, etc. but to consider these benefits in light of the greatest good for the greatest number.

4. The emphasis on medical coverage must be to encourage preventive medical procedures. We refer to such activities as general campus promotion of healthful activities and specifically:

   a. Provision for increased faculty and staff use of the recreational facilities of the university. Including simplification of procedures for use of the student rec center as a part of a deliberate health maintenance program.

   b. The administration should schedule regular on-campus screening activities such as high blood pressure tests, Papp tests and rectal cancer tests.

   c. The cost of regular (annual) health examinations should be covered in full.

Within this general framework this committee recommends the following changes to the current system. This listing is not meant to be considered as a recommendation of changes in a descending order of importance.

A. Parking - The ability to park within a reasonable distance of a person's place of employment is essential. The current system is rife with exception and special privilege and is totally inadequate. The administration must actively plan to develop additional new parking facilities.

B. Dependent fee waiver - It is suggested that the waiting period be reduced from five years to three.

C. There should be no limit on the number of courses which a faculty member is able to take without charge. (For example an off duty member should be able to take a full summer load).
Proposed Schedule for Reviewing the Administrative Staff Handbook

Revisions/Additions for 1986-87

by early December Personnel Welfare Committee review handbook and compile list of editorial changes and possible policy recommendations.

before Christmas Finalize editorial changes

by January ASC meeting Prepare first draft of Handbook

by February ASC meeting Finalize policy recommendations and editorial changes

by mid-February Forward final draft of Handbook to Administrative Council

by March ASC meeting Consider comments, approval of Administrative Council

by late March Prepare copies of Handbook for Board of Trustees

April Board of Trustees meeting
Appointment of Administrative Staff

At the time of initial appointment, the administrative staff member shall receive from the contracting officer a contract and a letter of appointment which shall include the job description and other terms of employment such as title, salary, and pay periods.

Continuance of Contract

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary

2. The University has made the decision not to renew the contract (see Non-Renewal of Contract, below) and has given timely written notification to the administrative staff member as follows:
   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years
   b. not later than January 1 of any subsequent fiscal year of contract service.
NOTE:

For administrative staff members whose contracts do not begin on July 1, the above dates will be adjusted to four months prior to the end of the contract for persons in first, second and third years and to six months prior to the end of the contract for persons in subsequent contract years of service.

Non-Renewal of Contract

Recommendations for non-renewal shall be made in writing by the contracting officer and shall include supporting written documentation. Examples of required documentation follow.

In the case of non-renewal because of performance, the written documentation shall include copies of past performance evaluations.

In the case of non-renewal because of reorganization, an employee's inability to serve the University within the reorganized unit shall be explained.
Termination of Contract

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "termination for cause." An administrative staff member may be terminated for cause during the contract year for the following reasons:

1. conviction of a felony;

2. proof of fraudulent credentials;

3. documented repeated failure to perform duties and services to the satisfaction of the staff member's immediate supervisor;

4. documented failure to accept reasonable changes in the job description as required by evolving technology or by changes in University organization, priorities, or resources.

Procedures for termination:

Recommendations for termination shall originate with the immediate supervisor and shall be sent to the contracting officer via appropriate area or department heads. If the immediate supervisor is a contracting officer, the recommendation is sent to the area vice president or to the President, whichever is appropriate. The final decision to terminate an administrative staff member immediately is made
by the contracting officer (or by the vice president or
President if the contracting officer is the immediate
supervisor). The Office of Administrative Staff Personnel
Services should be advised of recommendations and decisions
concerning termination. In the event of termination, the
staff member shall be continued on the payroll for fourteen
calendar days following the date of dismissal.

Suspension

In lieu of immediate termination for the above-cited reasons, an
administrative staff member may be suspended without pay until the
problem is resolved. In the event the suspension is resolved to the
staff member's favor, the staff member shall be entitled to full back pay
and benefits. The staff member may also be continued on suspended status
with pay on a temporary assignment to other job responsibilities.

Release

Release may be effected in the case of financial exigency, or bona
fide discontinuance of a program or departmental/divisional area, and the
staff member in first three years of employment will be given a minimum
of four months written notice. Staff members with more than three years
of employment will be given six months notice; except for the release of
persons funded by external grants which shall be contingent upon the
availability of said grant funds.

Mandatory:
1. **Flex Time**
   Most areas utilize it now. It has to be with the approval of the supervisor, cannot be abused, is not workable in some areas i.e. Food Service.

2. **Permanent Incentive Committee**
   Dr. Vogt wants this.

3. **"Child Care" Program**
   Mr. Rehmer is working on it but we need to zero in on it and push for it.

4. **Holiday Party at Christmas Time**
   According to the survey, the majority of the employees did not want it. If we had a holiday party there would be no awards dinners or awards.

5. **Recognition for Outstanding Work**
   Still needs defined and worked on.

6. **Better Communications With Departments**
   This is an internal problem within some departments and should be dealt with individually.

7. **Shift Differential Pay**
   This appears to be on a dead end road. Campus Safety and Heat Plant and night shift for Maintenance are probably only ones affected.

8. **Fee Waivers for Continuing Ed Classes**
   Nothing appears available for this. They have to make money. We can continue to work on it.

9. **Stress Workshop**
   This may be in the future with Ruth Friend.

10. **Better and Safer Equipment**
    When this was suggested it was with the Plant Operations and Maintenance in mind and there have been great strides made in the area as money becomes available. New vehicles, new equipment, etc.

11. **Discount Passes**
    Progress has been made. T.I.R.E.S. books will be made available to all classified employees in the near future.

12. **Reward for Money Saving Suggestions**
    Mr. Rehmer is working on this and it should be in effect in the near future.

13. **Picnic Table Area by the Union for Summer Eating Out**
    Not feasible. Would be used by students anyway.
14. Second Parking Pass Free of Charge
   Accomplished.

15. Job Pairing
    Can be done where feasible.

16. Expand List of Job Titles
    Is being worked on by other committee.

17. Personal Days
    Mr. Rahmer is working on this in regards to the reward for not using
    sick leave during the year. If no sick leave is used then two days
    sick leave may be converted to personal days. If less than three or
    four days is used then one day may be converted to personal day.
    This way all employees who have not used sick leave will be rewarded.

18. Medical Leave Without Pay for Up to One Year.
    Nothing has been done about this. How feasible is it? Do not
    understand the need for this.

19. Reimburse Employees for all unused Sick Leave Upon Retirement
    It is doubtful if this ever accomplished.

20. More Steps in Pay Scale
    309 has helped in this direction and the other sub-committee is working
    on it.
MEMORANDUM

TO: Gregg DeCrane, Chair, Administrative Staff Council
FROM: Paul Yon, Chair, Personnel Welfare Committee
RE: Merit and Across the Board Policies
DATE: March 12, 1986

For the last several weeks the Personnel Welfare Committee has been examining and discussing the current University policy for "across-the-board" and "merit" increases in conjunction with annual evaluations. It is the consensus of this committee that the current "across-the-board" policy, pro-rated by the number of months an employee is employed (less than one year), stand as is.

The Committee recommends that the question of "merit" be further examined and discussed by the Administrative Staff Merit Committee. The charge would be to first define "merit" and to investigate the consistency in its dissemination. This last provision could include: a) discretionary pools, b) one-time appropriations or awards, c) consistent evaluation time-tables to coincide with the budget process, d) etc. In short, this committee does not have the necessary information or data to present any concrete recommendations. However, I and the other committee members would be agreeable to discussing the topic in joint sessions if necessary.

Last, I apparently opened a "can of worms" at Executive Committee on Tuesday in regards to the "across the board" question. In a superficial examination of the Academic Charter, I did not locate text relating to the subject. However, I do know of one particular case; and after speaking with others, know that across-the-board increases have been withheld for "unsatisfactory performance". But, it was due to specific "extenuating circumstances". From what I gather, the decision to withhold "across-the-board increases" is made at the Dean's level.

I will ask Betsie to address this question, and hope to have a clarification by the next Executive Committee meeting. If you think we need to discuss this further please give me a call.

PDY/slb

"An Environment for Excellence"
MEMORANDUM

TO: Dr. Eloise Clark, Vice President, Academic Affairs

FROM: Paul D. Yon, Chair, Administrative Staff Council
Personnel Welfare Committee

RE: "Across-the-Board" Increases

DATE: March 13, 1986

For the last several months the Personnel Welfare Committee of
Administrative Staff Council has been reviewing current University policy
relevant to across-the-board and merit increases. After considerable
discussion and examination of appropriate data, we still are unable to
definitively describe "merit". Although the mini-workshop was generally aimed
at University faculty, I found it to be most helpful to me as a University
administrator in addressing the subject. It was most enlightening to learn
that other University-wide administrators are experiencing the same
difficulties identifying and evaluating "satisfactory performance".

During the discussion period someone raised a question pertinent to
administrators automatically granting "across-the-board" increases. I may be
mistaken but I understood from the ensuing discussion that with certain
extenuating circumstances, across-the-board increases may be withheld. From my
own experience I am quite familiar with the Cal Szekely case as it pertains to
Learning Resources. However, after speaking with several other faculty I also
was informed that other academic units also may have established precedents.
After carefully examining the Academic Charter I find that it fails to address
"across-the-board" increases. However, you indicated at that meeting that "in
principle it does not have to be awarded".

Therefore, would you please clarify the University's position on this
question because it has surfaced in the administrative staff area; more
specifically, the Personnel Welfare Committee, and I would like to respond to
those who have raised such concerns. I sincerely would appreciate any
assistance you could provide on this matter. Thanks!

PDY/sl b

"An Environment for Excellence"
MEMORANDUM

TO: Greg DeCrane, Chair
    Administrative Staff Council

FROM: Paul D. Yon, Chair
    Personnel Welfare Committee

RE: Contract Information: Non-renewal, Termination, Suspension, Release and Etc.

DATE: April 8, 1986

On 4 April the Personnel Welfare Committee met and discussed the Administration's concerns regarding the above mentioned policies. Because of time constraints the committee will not have the opportunity to meet and discuss all issues raised by the administration by May. However, if there is an "urgency" of Dr. Eakin to resolve the abovementioned issues before the end of this academic year, then my recommendation would be to call "Special" meetings directly with him to clarify and resolve each of those concerns.

If we are unable to meet, then it is this committee's recommendation that we let the current policy stand until the next academic year.

PDY/slb
MEMORANDUM

April 16, 1986

TO: President Olscamp
And Administrative Council

FROM: Mary M. Edmonds, Ph.D.
Vice President for Student Affairs

RE: Grievance procedures as presented in the
Administrative Staff Handbook

Even with revisions the grievance section and the termination and suspension parts of the Administrative Staff Handbook remain obscure and ambiguous. Since the document is currently being reviewed, I suggest that special attention be given to these sections. In light of recent developments there are several questions that should be considered. One, what is a grievable situation? This should be spelled out. Second, I believe that suspensions and terminations are two separate entities necessitating different language and procedures. Third, when one is suspended without pay, is it possible for the person to be granted sick leave or vacation pay or receive a leave of absence? I would object to that. When does conduct outside of the workplace become an issue with respect to suspension or termination? Would the same procedures hold? Should there be a University policy for the type of situation that transcends the various classification of employees? I am sure that other questions come easily to your mind.

I am requesting that these questions that have absorbed much of my energies in the past few days be looked at by classified and administrative staff prior to going to printers with the 1986-87 Handbooks.

MME:plp
Pet,
This is our draft for your review. I made a few additional minor editorial changes to make things read more smoothly.

Deanne
Appointment of Administrative Staff

At the time of initial appointment, the administrative staff member shall receive from the contracting officer a contract and a letter of appointment which shall include the job description and other terms of employment such as title, salary, and pay periods.

Continuance of Contract

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary

2. The University has made the decision not to renew the contract (see Non-Renewal of Contract, below) and has given timely written notification to the administrative staff member as follows:
   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years
   b. not later than January 1 of any subsequent fiscal year of contract service.
NOTE:

For administrative staff members whose contracts do not begin on July 1, the above dates will be adjusted to four months prior to the end of the contract for persons in first, second and third years and to six months prior to the end of the contract for persons in subsequent contract years of service.

Non-Renewal of Contract

Recommendations for non-renewal shall be made in writing by the contracting officer and shall include supporting written documentation. Examples of required documentation follow.

In the case of non-renewal because of performance, the written documentation shall include copies of past performance evaluations.

In the case of non-renewal because of reorganization, an employee's inability to serve the University within the reorganized unit shall be explained.
Termination of Contract

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "termination for cause." An administrative staff member may be terminated for cause during the contract year for the following reasons:

1. conviction of a felony;

2. proof of fraudulent credentials;

3. documented repeated failure to perform duties and services to the satisfaction of the staff member's immediate supervisor;

4. documented failure to accept reasonable changes in the job description as required by evolving technology or by changes in University organization, priorities, or resources.

Procedures for termination:

Recommendations for termination shall originate with the immediate supervisor and shall be sent to the contracting officer via appropriate area or department heads. If the immediate supervisor is a contracting officer, the recommendation is sent to the area vice president or to the President, whichever is appropriate. The final decision to terminate an administrative staff member immediately is made
by the contracting officer (or by the vice president or President if the contracting officer is the immediate supervisor). The Office of Administrative Staff Personnel Services should be advised of recommendations and decisions concerning termination. In the event of termination, the staff member shall be continued on the payroll for fourteen calendar days following the date of dismissal.

**Suspension**

In lieu of immediate termination for the above-cited reasons, an administrative staff member may be suspended without pay until the problem is resolved. In the event the suspension is resolved to the staff member's favor, the staff member shall be entitled to full back pay and benefits. The staff member may also be continued on suspended status with pay on a temporary assignment to other job responsibilities.

**Release**

Release may be effected in the case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area, and the staff member concerned will be given a minimum of three months written notice; except for the release of persons funded by external grants which shall be contingent upon the availability of said grant funds.
CONTRACT INFORMATION

Appointment of Administrative Staff

At the time of initial appointment, the administrative staff member shall receive from the contracting officer a contract and a letter of appointment which shall include the job description and other terms of employment such as title, salary, and pay periods.

Obligation to the University

An administrative staff member may not accept employment from outside the University that will adversely affect fulfillment of the responsibilities and duties of the assigned position/title.

Continuance/Termination/Release

A. Continuance

Continuance of Contract

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary.

2. The University has made the decision not to continue employment by RENEW THE CONTRACT (SEE NON-RENEWAL OF CONTRACT, BELOW) and has given timely WRITTEN notification to the administrative staff member as follows:

   a. Not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years.

   b. Not later than January 1 of any subsequent fiscal year of contract service.

   Recommendations for non-renewal (which will include supportive information) will be made to the appropriate supervisor whether or not the president or Board of Governing Board.

NOTE: For administrative staff members whose contracts do not begin on July 1, the above dates will be adjusted to four months prior to the end of the contract for persons in first, second and third years and to six months prior to the end of the contract for persons in subsequent contract years of service.
B. NON-RENEWAL OF CONTRACT

RECOMMENDATIONS FOR NON-RENEWAL SHALL BE MADE IN WRITING TO THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION. EXAMPLES OF REQUIRED DOCUMENTATION FOLLOW:

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, AN EMPLOYEE'S INABILITY TO SERVE THE UNIVERSITY WITHIN THE REORGANIZED UNIT SHALL BE EXPLAINED.

C. Termination of the Contract

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause." An administrative staff member may be terminated for cause during the contract year for the following reasons:

1. Termination for Cause

An administrative staff member may be terminated for cause during the contract year for the following reasons:

1.1. conviction of a felony (or other offense whose nature is inimical to the interest of the University)
1.2.Providing fraudulent documentation (proof of fraudulent credentials)

1.3. documented repeated failure to perform duties and services (as identified in the appointed position as may be altered or changed) to the satisfaction of the staff member's immediate supervisor;

4. DOCUMENTED FAILURE TO ACCEPT REASONABLE CHANGES IN THE JOB DESCRIPTION AS REQUIRED BY EVOLVING TECHNOLOGY OR BY CHANGES IN UNIVERSITY ORGANIZATION, PRIORITIES, OR RESOURCES.

PROCEDURES FOR TERMINATION

RECOMMENDATIONS FOR TERMINATION SHALL ORIGINATE WITH THE IMMEDIATE SUPERVISOR AND SHALL BE SENT TO THE CONTRACTING OFFICER VIA APPROPRIATE AREA OR DEPARTMENT HEADS. IF THE IMMEDIATE SUPERVISOR IS A CONTRACTING OFFICER, THE RECOMMENDATION IS SENT TO THE AREA VICE PRESIDENT OR TO THE PRESIDENT, WHICHEVER IS APPROPRIATE. THE FINAL DECISION TO TERMINATE AN ADMINISTRATIVE STAFF MEMBER IMMEDIATELY IS MADE.
BY THE CONTRACTING OFFICER OR BY THE VICE PRESIDENT OR
PRESIDENT IF THE CONTRACTING OFFICER IS THE IMMEDIATE
SUPERVISOR). THE OFFICE OF ADMINISTRATIVE STAFF PERSONNEL
SERVICES SHALL BE ADVISED OF RECOMMENDATIONS AND DECISIONS
CONCERNING TERMINATION. IN THE EVENT OF TERMINATION, THE
STAFF MEMBER SHALL BE CONTINUED ON THE PAYROLL FOR FOURTEEN
CALENDAR DAYS FOLLOWING THE DATE OF DISMISSAL.

D. SUSPENSION

IN LIEU OF IMMEDIATE TERMINATION FOR THE ABOVE-CITED REASONS,
AN ADMINISTRATIVE STAFF MEMBER MAY BE SUSPENDED WITHOUT PAY
UNTIL THE PROBLEM IS RESOLVED. IN THE EVENT THE SUSPENSION IS
RESOLVED TO THE STAFF MEMBER'S FAVOR, THE STAFF MEMBER SHALL
BE ENTITLED TO FULL BACK PAY AND BENEFITS. THE STAFF MEMBER
MAY ALSO BE CONTINUED ON SUSPENDED STATUS WITH PAY ON A
TEMPORARY ASSIGNMENT TO OTHER JOB RESPONSIBILITIES.

2. --- Dismissal or Suspension

Recommendations for termination for cause noted above
shall be sent to the President or appropriate Vice
President with appropriate documentation. After a
decision for dismissal or suspension is made, written
notice shall be given to the staff member involved
stating all provisions relating to that notice. The
President or appropriate Vice President may decide to
suspend the staff member immediately. In the event of a
dismissal or suspension, the staff member shall be
continued on the payroll for fourteen (14) calendar days
following the date of dismissal or suspension. The
President or appropriate Vice President may continue the
staff member on suspended status with pay through
temporary assignment to other job responsibilities until
the suspension is resolved. In the event the dismissed
or suspended is resolved in the staff member's favor
the staff member shall be entitled to full back pay and
benefits. If the staff member has been dismissed or
suspended without pay,

E. Release

Release may be affected EFFECTED in THE case of financial
exigency, or bona fide discontinuance of a program or
departmental/divisional area. and

1. the A staff member IN FIRST THREE YEARS OF
   EMPLOYMENT will be given a minimum of
   FOUR months' written notice;

2. STAFF MEMBERS WITH MORE THAN THREE YEARS OF
   EMPLOYMENT WILL BE GIVEN SIX MONTHS' NOTICE;

3. except for-the-The release of persons funded by
   external grants which shall be contingent upon the
   availability of said grant funds.

A notice for termination for cause or release is not affected
by Section 4 (Continuance).

---
Administrative Staff Council
Personnel Welfare Committee

28 April 1986

Members Present: Yon, Stickler, Fitzgerald, Darrow
Ex Officio: Caldwell
Guest: Greg DeCrane

The Administrative Executive Council has rejected the Administrative Staff Council revisions of the Continuance of Contract, Non-Renewal of Contract, Termination of Contract, Suspension and Release portion of the Administrative Staff Handbook, p. 8, 8.1, 9. A copy of the Executive Committee's suggested changes are attached (see Attachment A).

A meeting has been set with the above administrative staff and Drs. Eakin and Edmunds to work out the areas of conflict.

Executive Council has made the following changes (as seen on Attachment A):

p. 8.1

B. third line, deleted "Examples...follow" and the two indented paragraphs beginning with "In the case of..."

C. third line after "for cause" added "AMONG THE REASONS FOR WHICH"

line five - "ARE" is substituted for "for" and "reasons" is deleted.

C. 1. after "conviction of a felony," the following was added: "OR OTHER OFFENSE WHOSE NATURE IS INIMICAL TO THE INTERESTS OF THE UNIVERSITY."

C. 3. "repeated" was deleted.

p. 9

D. first line "for the above stated reasons" is deleted.

E. 1. line 1, "THE" is added between "in" and "first"

E. 1. "stet" is written by "three" and "FOUR" is crossed out.

E. 2. line 2, "SIX" is crossed out and "4" is written in.

E. 3. line 2, "which" is crossed out.
The Personnel Welfare Committee made the following changes to the Executive Council's version of p. 8, 8.1, and 9 of the Administrative Staff Handbook:

**p. 8.1 B**

Both subparagraphs beginning with "In the case of" were added back.

In the first paragraph beginning with "In the case of", "UNLESS NOT AVAILABLE IN THE CASE OF FIRST YEAR EMPLOYEES" was added following "evaluations."

**p. 8.1 C**

first paragraph, "Among the reasons for which" was deleted.

C. 1. "or other offense whose nature is inimical to the interests of the University" was deleted.

c. 3. "SIGNIFICANT" replaces "repeated."

Addition of C. 5: "DOCUMENTED GROSS FAILURE TO COMPLY WITH THE CODE OF STANDARDS AND RESPONSIBILITIES FOR ADMINISTRATORS" if non-renewal is grievable.

**p. 9**

Suspension was divided into "SUSPENSION AS INTERIM STEP TO TERMINATION" and "DISCIPLINARY SUSPENSION."

Details on suspension on Attachment B.

It was agreed that a clean copy of the above changes would be prepared before the 5 May meeting with Edmunds and Eakin but that 8.1 C.5 would not be formally added at this time. Stickler agreed to prepare the clean copy (since Darrow is in one of the busiest times in her office. [Darrow greatly appreciated this help.]).

It was felt that the PWC has potentially given a great deal and agreed that the addition of 8.1 C.5 would be dependent upon the grievability of non-renewal.

The PWC will meet following the Administrative Staff Council meeting on 1 May to go over the revisions.

It was agreed to meet at 8 a.m. (in the Conference Room at 231 Administration Bldg.) prior to the 5 May meeting with Drs. Edmunds and Eakin.

Attachments (2)
A. **CONTINUANCE OF CONTRACT**

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary.

2. The University has made the decision not to renew employment and has given timely WRITTEN notification to THE ADMINISTRATIVE STAFF MEMBER as follows:

   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years.

   b. not later than January 1 of any subsequent fiscal year of contract service.

**NOTE:** For administrative staff members whose contracts do not begin on July 1, the above dates will be adjusted to four months prior to the end of the contract for persons in first, second and third years and to six months prior to the end of the contract for persons in subsequent contract years of service.
B. NON-RENEWAL OF CONTRACT

RECOMMENDATIONS FOR NON-RENEWAL SHALL BE MADE IN WRITING TO THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION. Examples of required documentation follow.

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, AN EMPLOYEE'S INABILITY TO SERVE THE UNIVERSITY WITHIN THE REORGANIZED UNIT SHALL BE EXPLAINED.

C. TERMINATION OF CONTRACT

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause." AN ADMINISTRATIVE STAFF MEMBER MAY BE TERMINATED FOR CAUSE DURING THE CONTRACT YEAR FOR THE FOLLOWING REASONS:

1. Termination for Cause

a. An administrative staff member may be terminated for cause during the contract year for the following reasons:

- [Life imprisonment or other offense whose nature is inimical to the interests of the university]

- [Proof of fraudulent credentials]

- [Documented repeated failure to perform duties and services as identified in the appointed position or title as may be assigned or changed] to the satisfaction of the staff member's immediate supervisor;

4. Documented failure to accept reasonable changes in the job description as required by evolving technology or by changes in university organization, priorities, or resources.

PROCEDURES FOR TERMINATION

RECOMMENDATIONS FOR TERMINATION SHALL ORIGINATE WITH THE IMMEDIATE SUPERVISOR AND SHALL BE SENT TO THE CONTRACTING OFFICER VIA APPROPRIATE AREA OR DEPARTMENT HEADS. IF THE IMMEDIATE SUPERVISOR IS A CONTRACTING OFFICER, THE RECOMMENDATION IS SENT TO THE AREA VICE PRESIDENT OR TO THE PRESIDENT, WHICHEVER IS APPROPRIATE. THE FINAL DECISION TO TERMINATE AN ADMINISTRATIVE STAFF MEMBER IMMEDIATELY IS MADE.

8.1 -

D. SUSPENSION

IN LIEU OF IMMEDIATE TERMINATION FOR THE ABOVE-CITED REASONS, AN ADMINISTRATIVE STAFF MEMBER MAY BE SUSPENDED WITHOUT PAY UNTIL THE PROBLEM IS RESOLVED. IN THE EVENT THE SUSPENSION IS RESOLVED TO THE STAFF MEMBER'S FAVOR, THE STAFF MEMBER SHALL BE ENTITLED TO FULL BACK PAY AND BENEFITS. THE STAFF MEMBER MAY ALSO BE CONTINUED ON SUSPENDED STATUS WITH PAY ON A TEMPORARY ASSIGNMENT TO OTHER JOB RESPONSIBILITIES.

2. --- Dismissal or Suspension

Recommendations for termination for cause noted above shall be sent to the President or appropriate Vice President with appropriate documentation. After a decision for dismissal or suspension is made, written notice shall be given to the staff member involved stating all provisions relating to that notice. The President or appropriate Vice President may dismiss or suspend the staff member immediately. In the event of dismissal or suspension, the staff member shall be continued on the payroll for fourteen (14) calendar days following the date of dismissal or suspension. The President or appropriate Vice President may continue the staff member on suspended status with pay through temporary assignment to other job responsibilities until the suspension is resolved. In the event the dismissal or suspension is resolved in the staff member's favor, the staff member shall be entitled to full back pay and benefits. In the staff member had term dismissed or suspended without pay.

E. Release

Release may be affected EFFECTED in THE case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area. AND

1. THE A staff member IN A FIRST THREE YEARS OF EMPLOYMENT CONSIDERED will be given a minimum of three (3) months' written notice;

2. STAFF MEMBERS WITH MORE THAN THREE YEARS OF EMPLOYMENT WILL BE GIVEN SIX MONTHS' NOTICE;

3. except --- for --- the --- The release of persons funded by external grants which shall be contingent upon the availability of said grant funds.

--- notice for termination for cause or release is not affected by Section A (Continued) ---
EVALUATION PROCEDURE

1. ALL ADMINISTRATIVE CONTRACT STAFF SHOULD BE EVALUATED EACH YEAR PRIMARILY ON THE BASIS OF:

- PERFORMANCE OF PRIMARY DUTIES
- PERFORMANCE OF OCCASIONAL DUTIES
- ATTAINMENT OF AGREED UPON GOALS

2. IT IS STRONGLY RECOMMENDED THAT EACH VICE PRESIDENT ESTABLISH A COMMITTEE COMPOSED OF ALL THE ADMINISTRATIVE STAFF COUNCIL REPRESENTATIVES OF THAT AREA TO DEVELOP A FORMAT FOR WRITTEN EVALUATIONS FOR THE AREA. EACH VICE PRESIDENT AND ADMINISTRATIVE STAFF COUNCIL REPRESENTATIVES SHOULD AGREE TO THE FORMAT. ALL FORMATS FOR WRITTEN EVALUATION WILL INCLUDE THE CRITERIA LISTED IN ITEM 1 ABOVE.

3. WITHIN EACH DEPARTMENT OR AREA, A STAFF MEMBER MAY BE EVALUATED ON ADDITIONAL CRITERIA APPROPRIATE TO THE POSITION AND AGREED TO IN ADVANCE BY THE STAFF MEMBER AND THE SUPERVISOR. THESE CRITERIA MAY INCLUDE, BUT ARE NOT LIMITED TO:

- SUPERVISORY SKILLS
- INNOVATION
- PROFESSIONAL DEVELOPMENT
- INTERPERSONAL RELATIONSHIPS INCLUDING SUPPORT OF HUMAN RIGHTS
- COUNSELING
- AWARDS/HONORS
- TEACHING
- SERVICE ON GOVERNANCE BODIES
- FACILITY MANAGEMENT
- LEARNING NEW SKILLS
- UNIVERSITY AND PROFESSIONAL SERVICE
- PEER RELATIONSHIPS
- RESEARCH/PUBLICATIONS/PRESENTATIONS
- COMMUNICATION SKILLS
- STUDENT EVALUATIONS

4. THE EVALUATION PROCESS SHOULD OCCUR IN TWO STEPS.

A. THE STAFF MEMBER AND SUPERVISOR SHOULD MEET AND ACCOMPLISH THE FOLLOWING:

REVIEW AND DETERMINE STAFF MEMBER'S JOB DESCRIPTION AND GOALS FOR THE NEXT CONTRACT PERIOD AND MAKE ANY NECESSARY CHANGES TO THE BASIC JOB DESCRIPTION.

BASED ON THE ABOVE AGREEMENTS, DETERMINE EVALUATION CRITERIA THAT WILL BE USED TO ASSESS THE STAFF MEMBER'S PERFORMANCE.

THE STAFF MEMBER AND SUPERVISOR WILL CONFIRM THE JOB DESCRIPTION, GOALS AND EVALUATION CRITERIA IN WRITING.

5. THE SUPERVISOR WILL SEND COPIES OF THE WRITTEN EVALUATION TO THE OFFICE OF ADMINISTRATIVE STAFF PERSONNEL SERVICES AND TO THE STAFF MEMBER.
CONTRACT INFORMATION

APPOINTMENT OF ADMINISTRATIVE STAFF

At the time of initial appointment, the administrative staff member shall receive from the contracting officer a contract and a letter of appointment which shall include the job description and other terms of employment such as title, salary, and pay periods.

CONTINUANCE OF CONTRACT

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary
2. The University has made the decision not to renew the contract (see non-renewal of contract, below) and has given timely written notification to the administrative staff member as follows:
   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years
   b. not later than January 1 of any subsequent fiscal year of contract service.

NOTE:

For administrative staff members whose contracts do not begin on July 1, the above dates will be adjusted to four months prior to the end of the contract for persons in first, second and third years and to six months prior to the end of the contract for persons in subsequent contract years of service.
NON-RENEWAL OF CONTRACT

RECOMMENDATIONS FOR NON-RENEWAL SHALL BE MADE IN WRITING TO THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION.

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS, unless not available in the case of first-year employees.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, AN EMPLOYEE'S INABILITY TO SERVE THE UNIVERSITY WITHIN THE REORGANIZED UNIT SHALL BE EXPLAINED.

TERMINATION OF CONTRACT

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause." AN ADMINISTRATIVE STAFF MEMBER MAY BE TERMINATED FOR CAUSE DURING THE CONTRACT YEAR FOR THE FOLLOWING REASONS:

1. conviction of a felony;
2. proof of fraudulent credentials;
3. DOCUMENTED SIGNIFICANT failure to perform duties and services to the satisfaction of the staff member's immediate supervisor;
4. DOCUMENTED FAILURE TO ACCEPT REASONABLE CHANGES IN THE JOB DESCRIPTION AS REQUIRED BY EVOLVING TECHNOLOGY OR BY CHANGES IN UNIVERSITY ORGANIZATION, PRIORITIES OR RESOURCES.

PROCEDURES FOR TERMINATION:
RECOMMENDATIONS FOR TERMINATION SHALL ORIGINATE WITH THE IMMEDIATE SUPERVISOR AND SHALL BE SENT TO THE CONTRACTING OFFICER VIA APPROPRIATE AREA OR DEPARTMENT HEADS. IF THE IMMEDIATE SUPERVISOR IS A CONTRACTING OFFICER, THE RECOMMENDATION IS SENT TO THE AREA VICE PRESIDENT OR TO THE PRESIDENT, WHICHEVER IS APPROPRIATE. THE FINAL DECISION TO TERMINATE AN ADMINISTRATIVE STAFF MEMBER IMMEDIATELY IS MADE BY THE CONTRACTING OFFICER (OR BY THE VICE PRESIDENT OR PRESIDENT IF THE CONTRACTING OFFICER IS THE IMMEDIATE SUPERVISOR). THE OFFICE OF ADMINISTRATIVE STAFF PERSONNEL SERVICES SHOULD BE ADVISED OF RECOMMENDATIONS AND DECISIONS CONCERNING TERMINATION. IN THE EVENT OF TERMINATION, THE STAFF MEMBER SHALL BE CONTINUED ON THE PAYROLL FOR FOURTEEN CALENDAR DAYS FOLLOWING THE DATE OF DISMISSAL.
D. SUSPENSION

There are two types of suspension. The first type of suspension is an interim step toward termination. The second type of suspension is disciplinary suspension. Upon the recommendation of the supervisor, the contracting officer may suspend except where the supervisor is the contracting officer in which case the decision shall be made by the area vice president or the president whichever is appropriate.

1. Suspension as interim step to termination.
   Suspension can be invoked during the period in which an employee is being considered for termination. Suspension as an interim step toward termination will include:
   
   - 14 days pay and pay for unused vacation
   - health care purchased by the suspended employee (see leave of absence policy)
   - All pay and benefits will be accrued and held in escrow by the University until the termination issue is resolved. In the event the suspension is resolved in favor of the staff member, the staff member shall be entitled to full back pay and benefits.

2. Disciplinary Suspension

   Suspension up to 30 days may be used as a disciplinary procedure either in lieu of termination or as a means of dealing with less serious or temporary problems. Such suspension shall be without pay. Vacation cannot be used nor earned. All other benefits will continue as usual. In order to avoid capricious action on the part of the supervisor, such suspension may be grieved.

RELEASE

Release may be EFFECTED in the case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area. The staff member IN THE FIRST THREE YEARS OF EMPLOYMENT will be given a minimum of FOUR months written notice; STAFF MEMBERS WITH MORE THAN THREE YEARS OF EMPLOYMENT WILL BE GIVEN SIX MONTHS NOTICE. The release of persons funded by external grants which shall be contingent upon the availability of said grant funds.
NON-RENEWAL OF CONTRACT

RECOMMENDATIONS FOR NON-RENEWAL SHALL BE MADE IN WRITING BY THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION.

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS, unless not available in the case of first-year employees.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, AN EMPLOYEE'S INABILITY TO SERVE THE UNIVERSITY WITHIN THE REORGANIZED UNIT SHALL BE EXPLAINED.

TERMINATION OF CONTRACT

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause." AN ADMINISTRATIVE STAFF MEMBER MAY BE TERMINATED FOR CAUSE DURING THE CONTRACT YEAR FOR THE FOLLOWING REASONS:

1. conviction of a felony;
2. proof of fraudulent credentials;
3. DOCUMENTED SIGNIFICANT failure to perform duties and services to the satisfaction of the staff member's immediate supervisor;
4. DOCUMENTED FAILURE TO ACCEPT REASONABLE CHANGES IN THE JOB DESCRIPTION AS REQUIRED BY EVOLVING TECHNOLOGY OR BY CHANGES IN UNIVERSITY ORGANIZATION, PRIORITIES OR RESOURCES.
5. tie in a Code of Conduct Documented gross failure to comply with Code of Conduct Standards.

PROCEDURES FOR TERMINATION:
RECOMMENDATIONS FOR TERMINATION SHALL ORIGINATE WITH THE IMMEDIATE SUPERVISOR AND SHALL BE SENT TO THE CONTRACTING OFFICER VIA APPROPRIATE AREA OR DEPARTMENT HEADS. IF THE IMMEDIATE SUPERVISOR IS A CONTRACTING OFFICER, THE RECOMMENDATION IS SENT TO THE AREA VICE PRESIDENT OR TO THE PRESIDENT, WHICHERVER IS APPROPRIATE. THE FINAL DECISION TO TERMINATE AN ADMINISTRATIVE STAFF MEMBER IMMEDIATELY IS MADE BY THE CONTRACTING OFFICER (OR BY THE VICE PRESIDENT OR PRESIDENT IF THE CONTRACTING OFFICER IS THE IMMEDIATE SUPERVISOR). THE OFFICE OF ADMINISTRATIVE STAFF PERSONNEL SERVICES SHOULD BE ADVISED OF RECOMMENDATIONS AND DECISIONS CONCERNING TERMINATION IN THE EVENT OF TERMINATION, THE STAFF MEMBER SHALL BE CONTINUED ON THE PAYROLL FOR FOURTEEN CALENDAR DAYS FOLLOWING THE DATE OF DISMISSAL.
D. SUSPENSION

There are two types of suspension. The first type of suspension is an interim step toward termination. The second type of suspension is disciplinary suspension. Upon the recommendation of the supervisor, the contracting officer may suspend except where the supervisor is the contracting officer where the decision shall be made by the area vice president or the president whichever is appropriate.

1. Suspension as interim step to termination.
   Suspension can be invoked during the period in which an employee is being considered for termination. Suspension as an interim step toward termination will include:
   - 14 days pay and acc. for unused vacation
   - Health care purchased by the suspended employee (see leave of absence policy)
   All pay and benefits will be accrued and held in escrow by the University until the termination issue is resolved. In the event the suspension is resolved in the staff member’s favor, the staff member shall be entitled to full back pay and benefits.

2. Disciplinary Suspension
   Suspension up to 30 days may be used as a disciplinary procedure either in lieu of termination or as a means of dealing with less serious or temporary problems. Such suspension shall be without pay. In order to avoid capricious action on the part of the supervisor, such suspension may be grieved.
   Vacation cannot be used nor earned. Other benefits will continue as well.

RELEASE

Release may be EFFECTED in the case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area. The staff member IN THE FIRST THREE YEARS OF EMPLOYMENT will be given a minimum of FOUR months written notice; STAFF MEMBERS WITH MORE THAN THREE YEARS OF EMPLOYMENT WILL BE GIVEN SIX MONTHS NOTICE. The release of persons funded by external grants which shall be contingent upon the availability of said grant funds.
Administrative Staff Council

Personnel Welfare Committee
Special Meeting with Drs. Eakin and Edmunds

5 May 1986

Present: Yon, Stickler, Fitzgerald, Darrow, Caldwell, Edmunds, Eakin

Yon circulated the PWC's latest revision of p.8, 8.1, 9 of the Administrative Staff Handbook to those present. He further stated that the Committee sees an exchange of removal of "The decision not to continue the contract of an administrative staff member is not grievable, and therefore, not subject to this procedure." (p. 11, I, A, line 4-7, Administrative Staff Handbook) and addition of "Documented gross failure to comply with the Code of Standards and Responsibilities for Administrators." (p. 8.1, C. 5, Administrative Staff Handbook). Edmunds and Eakin agreed to take it to Executive Council.

p. 8

Under "Contract Information," the following was added:
"A RECORD OF CHANGES IN EMPLOYEE'S CONTRACT STATUS WILL BE MAINTAINED IN THE EMPLOYEE'S PERSONNEL FILE LOCATED IN THE ADMINISTRATIVE STAFF PERSONNEL SERVICES OFFICE."

p. iv.

Second paragraph, 4th line add the following after "University": "INCLUDING EVALUATIONS AND CONTRACT INFORMATION."

p. 8.1 B.

Third paragraph changed to read "IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, THE WRITTEN DOCUMENTATION SHALL INCLUDE DETAILS AND RATIONALE OF THE REORGANIZATION INCLUDING ANY REASSIGNMENT TO EXISTING STAFF OF DUTIES PREVIOUSLY ASSIGNED TO THE NON-RENEWED EMPLOYEE."

p. 8.1 C

Addition of #5: "DOCUMENTED GROSS FAILURE TO COMPLY WITH THE CODE OF STANDARDS AND RESPONSIBILITIES FOR ADMINISTRATION" (see p. 1, Administrative Staff Handbook.)

p. 8.1 C

Paragraph following 5, "..be continued on the payroll for fourteen calendar days following the date of dismissal" was changed to read: "...RECEIVE 10 WORKING DAYS PAY UPON DISMISSAL."
p. 9, D. 1

"...14 days pay and pay for unused vacation" changed to: "...10 WORKING DAYS PAY AND PAY FOR UNUSED VACATION."

"...health care purchased by the suspended employee (see leave of absence policy) changed to "...AN OPPORTUNITY FOR THE SUSPENDED EMPLOYEE TO CONTINUE UNIVERSITY HEALTH CARE INSURANCE AT THE EMPLOYEE'S EXPENSE FROM THE FIRST DAY OF THE MONTH FOLLOWING THE DATE OF THE SUSPENSION THROUGH THE RESOLUTION OF THE SUSPENSION."

Paragraph 4 following "benefits" the following was added: 
"...INCLUDING RESTORATION OF VACATION DAYS, AND RECORDS OF THE SUSPENSION SHALL BE REMOVED FROM THE EMPLOYEE'S FILES."

p. 9, D. 2

Line 1, addition of "CALENDAR" before "days."

Eliminate last sentence "in order to avoid capricious action on the part of the supervisor, such suspension may be grieved." and make all termination and suspension grievable.

p. 9 Release

The following changes were made: From "The staff member in the first three years of employment will be given a minimum of 4 months written notice; staff members with more than 3 years of employment will be given 6 months notice. The release of persons funded by external grants which shall be contingent upon the availability of said grants." to

- IN THE CASE OF RELEASE BECAUSE OF FINANCIAL EXIGENCY, THE STAFF MEMBER CONCERNED WILL BE GIVEN A MINIMUM OF THREE MONTHS NOTICE.

- IN THE CASE OF RELEASE BECAUSE OF BONA FIDE DISCONTINUANCE OF A PROGRAM OR DEPARTMENTAL/DIVISIONAL AREA, THE STAFF MEMBER IN THE FIRST THREE YEARS OF EMPLOYMENT WILL BE GIVEN A MINIMUM OF FOUR MONTHS NOTICE; THE STAFF MEMBER WITH MORE THAN THREE YEARS OF EMPLOYMENT WILL BE GIVEN A MINIMUM OF SIX MONTHS NOTICE.

- THE RELEASE OF PERSONS FUNDED BY EXTERNAL GRANTS SHALL BE CONTINGENT UPON THE AVAILABILITY OF SAID GRANT FUNDS.
p. 11 A

Deletion of the following: "The decision not to continue the contract of an administrative staff member is not grievable, and, therefore, not subject to this procedure."

The four hour meeting ended on a note of optimism. All parties worked to make it the best document possible from both the employee's and administrator's vantage point (most of us serve both roles).

The document will go to Executive Council May 6 and then to legal counsel. Hopefully, it will be ready for action by the Administrative Staff Council May 15 for a vote.

An attachment of the changes is enclosed.

Susan Davenport Narrow

Enclosure
CONTRACT INFORMATION

A RECORD OF CHANGES IN AN EMPLOYEE'S CONTRACT STATUS WILL BE MAINTAINED IN THE EMPLOYEE'S PERSONNEL FILE LOCATED IN THE ADMINISTRATIVE STAFF PERSONNEL SERVICES OFFICE.

Appointment Information: APPOINTMENT OF ADMINISTRATIVE STAFF

Administrative staff members shall be advised in writing at the time of initial appointment of the primary responsibility of the position including title, salary, and pay period.


Obligation to the University

An administrative staff member may not accept employment from outside the University that will adversely affect fulfillment of the responsibilities and duties of the assigned position/title.

Continuance/Termination/Release

A. Continuance - CONTINUANCE OF CONTRACT

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary.

2. The University has made the decision not to continue employment (RENEW THE CONTRACT SEE NON-RENEWAL OF CONTRACT, BELOW) and has given timely WRITTEN notification TO THE ADMINISTRATIVE STAFF MEMBER as follows:

   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years.

   b. not later than January 1 of any subsequent fiscal year of contract service.

Recommendations -- for -- non-renewal -- (which will include supportive information) will be made to the appropriate supervisor whether President, appropriate Vice-President or Dean by area heads.

NOTE: FOR ADMINISTRATIVE STAFF MEMBERS WHOSE CONTRACTS DO NOT BEGIN ON JULY 1, THE ABOVE DATES WILL BE ADJUSTED TO FOUR MONTHS PRIOR TO THE END OF THE CONTRACT FOR PERSONS IN FIRST, SECOND AND THIRD YEARS AND TO SIX MONTHS PRIOR TO THE END OF THE CONTRACT FOR PERSONS IN SUBSEQUENT CONTRACT YEARS OF SERVICE.
B. NON-RENEWAL OF CONTRACT

RECOMMENDATION FOR NON-RENEWAL SHALL BE MADE IN WRITING TO THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION.

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS, UNLESS UNAVAILABLE IN THE CASE OF FIRST YEAR EMPLOYEES.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, THE WRITTEN DOCUMENTATION SHALL INCLUDE DETAILS AND RATIONALE OF THE REORGANIZATION, INCLUDING ANY REASSIGNMENT TO EXISTING STAFF OF DUTIES PREVIOUSLY ASSIGNED TO THE NON-RENEWED EMPLOYEE.

C. TERMINATION OF CONTRACT

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause" or "Release." AN ADMINISTRATIVE STAFF MEMBER MAY BE TERMINATED FOR CAUSE DURING THE CONTRACT YEAR FOR THE FOLLOWING REASONS:

1. conviction of a felony;
2. if credentials are proved to be fraudulent; -proof of fraudulent credentials
3. documented significant failure to perform duties and services (as identified in the appointed position or title and/or as may be assigned or changed) to the satisfaction of the staff member's immediate supervisor.
4. documented failure to accept reasonable changes in the job description as required by evolving technology or by changes in university organization, priorities, or resources.
5. documented gross failure to comply with the code of standards and responsibilities for administrators (see page 1).

RECOMMENDATIONS FOR TERMINATION SHALL ORIGINATE WITH THE IMMEDIATE SUPERVISOR AND SHALL BE SENT TO THE CONTRACTING OFFICER VIA APPROPRIATE AREA OR DEPARTMENT HEADS. IF THE IMMEDIATE SUPERVISOR IS A CONTRACTING OFFICER, THE RECOMMENDATION IS SENT TO THE AREA VICE PRESIDENT OR TO THE PRESIDENT, WHICHEVER IS APPROPRIATE. THE FINAL DECISION TO TERMINATE AN ADMINISTRATIVE STAFF MEMBER IMMEDIATELY IS MADE BY THE CONTRACTING OFFICER (OR BY THE VICE PRESIDENT OR PRESIDENT IF THE CONTRACTING OFFICER IS THE IMMEDIATE SUPERVISOR). THE OFFICE OF ADMINISTRATIVE STAFF PERSONNEL SERVICES SHALL BE ADVISED OF RECOMMENDATIONS AND DECISIONS CONCERNING TERMINATION. IN THE EVENT OF TERMINATION, THE STAFF MEMBER SHALL RECEIVE 10 WORKING DAYS PAY UPON DISMISSAL.
D. SUSPENSION

THERE ARE TWO TYPES OF SUSPENSION. THE FIRST TYPE OF SUSPENSION IS AN INTERIM STEP TOWARD TERMINATION. THE SECOND TYPE OF SUSPENSION IS DISCIPLINARY SUSPENSION. UPON THE RECOMMENDATION OF THE SUPERVISOR, THE CONTRACTING OFFICER MAY SUSPEND EXCEPT WHERE THE SUPERVISOR IS THE CONTRACTING OFFICER IN WHICH CASE THE DECISION SHALL BE MADE BY THE AREA VICE PRESIDENT OR THE PRESIDENT WHICHEVER IS APPROPRIATE.

1. SUSPENSION AS INTERIM STEP TO TERMINATION

SUSPENSION CAN BE INVOKED DURING THE PERIOD IN WHICH AN EMPLOYEE IS BEING CONSIDERED FOR TERMINATION. SUSPENSION AS AN INTERIM STEP TOWARD TERMINATION WILL INCLUDE

- 10 WORKING DAYS PAY AND PAY FOR UNUSED VACATION;
- AN OPPORTUNITY FOR THE SUSPENDED EMPLOYEE TO CONTINUE UNIVERSITY HEALTH CARE INSURANCE, AT THE EMPLOYEE’S EXPENSE FROM THE FIRST DAY OF THE MONTH FOLLOWING THE DATE OF THE SUSPENSION THROUGH THE RESOLUTION OF THE SUSPENSION.

ALL PAY AND BENEFITS WILL BE ACCRUED AND HELD IN ESCROW BY THE UNIVERSITY UNTIL THE TERMINATION ISSUE IS RESOLVED. IN THE EVENT THE SUSPENSION IS RESOLVED TO THE STAFF MEMBER’S FAVOR, THE STAFF MEMBER SHALL BE ENTITLED TO FULL BACK PAY AND BENEFITS, INCLUDING RESTORATION OF VACATION DAYS, AND RECORDS OF THE SUSPENSION SHALL BE REMOVED FROM THE EMPLOYEE’S FILES.

2. DISCIPLINARY SUSPENSION

SUSPENSION UP TO 30 CALENDAR DAYS MAY BE USED AS A DISCIPLINARY PROCEDURE EITHER IN LIEU OF TERMINATION OR AS A MEANS OF DEALING WITH LESS SERIOUS OR TEMPORARY PROBLEMS. SUCH SUSPENSION SHALL BE WITHOUT PAY. VACATION CANNOT BE USED NOR EARNED. ALL OTHER BENEFITS WILL CONTINUE AS USUAL.

2: --- DISMISSAL-OR-SUSPENSION

Recommendations—For—termination—for—cause—noted—above—shall—be—sent—to—the-President—or—appropriate—Vice-President—with—appropriate—documentation.—After—a—decision—for—dismissal—or—suspension—is—made,—written—notice—shall—be—given—to—the-staff—member—involved—stating—all—provisions—relating—to—that—notice—The-President—or—appropriate—Vice-President—may—dismiss—or—suspend—the-staff—member—immediately.---In—the-event—of—a—dismissal—or—suspension,—the-staff-member—shall—be—continued—on—the-payroll—for—fourteen-(14)—calendar—days—following—the-date—of—dismissal—or—suspension.—The-President—or—appropriate—Vice-President—may—continue—the-staff-member—in—suspended-status—with-pay—through—temporary-assigned—to-other-job—responsibilities—until—the-suspension—is—resolved.—In—the-event—the—dismissal—or—suspension—is—resolved—in—the-staff-member’s-favor—the-staff—member—shall—be—entitled—to—full-back-pay-and-benefits—if-the-staff-member-had—been—dismissed—or—suspended—without-pay.
E. Release

Release may be affected in the case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area, and the staff member concerned will be given a minimum of three months written notice; except for the release of persons funded by external grants—which shall be contingent upon the availability of said grant funds.

A notice for termination for cause or release is not effected by Section A (Continuance).

- In the case of release because of financial exigency, the staff member concerned will be given a minimum of three months notice.

- In the case of release because of bona fide discontinuance of a program or departmental/divisional area, the staff member in the first three years of employment will be given a minimum of four months notice; the staff member with more than three years of employment will be given a minimum of six months notice.

- The release of persons funded by external grants shall be contingent upon the availability of said grant funds.
MEMORANDUM

TO:       Dr. Richard Eakin
           Vice President for Planning & Budgeting

FROM:    Gregg DeCrane
           Chair, Administrative Staff Council

DATE:     May 8, 1986

SUBJECT: Handbook Changes

After being notified of the response from Administrative Council in regards to
the proposed changes in the Administrative Staff Handbook, and subsequently
conferring with the Personnel Welfare Committees of Administrative Staff
Council, the following position is held:

1. Sections A, C, D and E are acceptable if a compromise can be
   reached on Section B regarding the grievance of non-renewal. An
   overlapping of sections does not permit unconditional approval
   of those sections.

2. Section B's revised wording is acceptable and the principle of the
   wording would be acceptable if the following change was made:

   Change Grievance and Hearing Procedures I., A, paragraph 1,
   last sentence to read, "The decision not to renew the contract
   of an administrative staff member, in the first three years of
   employment, is not grievable, and, therefore, not subject to
   this procedure."

The change suggested takes into consideration the fact that non-renewal is a
management's prerogative; new employees should be viewed in a more probationary
status; employees with a number of years in service have demonstrated their
worth to the institution and thus, if not renewed, should expect an opportunity
to be heard; non-renewal is a rare occurrence on this campus; and finally, an
understanding that grievance decisions are only recommendations.

In terms of being able to show improvements in the policy as it relates to
employees, it is felt that with this change it could be salable to ASC.
Without the change it is felt that we have a well written policy that benefits
management at the expense of employees.

In general, when approaching changes to the Contract Information section of the
handbook it was felt, and mutually agreed upon, that changes were indeed
necessary to make the document clearer and the process simpler as well as
fair. The changes are not being looked upon as adverse in nature, but rather
such that the University as a whole is benefitting. While those involved in
the writing of the changes were both potential supervisors and grieving
employees, it should be understood that the Administrative Staff Council must
have paramount concern for the welfare of the administrative staff member.

It is hoped that a response to the above recommendation may be received in a
timely manner to allow for presentation to the Administrative Staff Council at
its special meeting of May 15. If I can assist further, please call.
Administrative Staff Council
Personnel Welfare Committee
18 May 1986

The Administrative Executive Council rejected the
document developed by the Administrative Staff Council's
Personnel Welfare and Drs. Eakin and Edmunds. A meeting
was called of the Personnel Welfare Committee and the
Administrative Staff Council Executive Committee. Those
in attendance were: DeCrane, Sharp, Yon, Darrow, Stickler,
and Fitzgerald.

Those present agreed to put forth the suggestion that
a compromise be presented: The Administrative Staff would
agree to leaving in the following on page 8.1, C 5 of the
Administrative Staff Handbook: "DOCUMENTED GROSS FAILUPE TO
COMPLY WITH THE CODE OF STANDARDS AND RESPONSIBILITIES FOR
ADMINISTRATORS (SEE PAGE 1)." if the wording on page 11. I.
A. of the same document would be changed to read: "THE
DECISION NOT TO CONTINUE THE CONTRACT OF AN ADMINISTRATIVE
STAFF MEMBER IS NOT GRIEVABLE IN THE FIRST THREE YEARS OF
EMPLOYMENT, AND, THEREFORE, NOT SUBJECT TO THIS PROCEDURE."

DeCrane agreed to write up that suggestion, along with
Administrative Staff concerns with achieving the fairest
document possible for both the employer and employee. It
was further stressed that most of us serve both roles, that
of supervisor and that of employee, and we are sensitive to
both needs.

DeCrane was told that the revision would be submitted
to legal counsel and then back to Administrative Executive
Council.

* * * *

POSTDATE: Administrative Staff Council was informed
that legal counsel rejected the revision. The next Administra-
tive Staff Council meeting is June 5. At that time, members
will be asked to accept the "Contract Information" portion of
the Administrative Staff Handbook, (p. 9, 9.1, 9) as revised
or reject it as is and let the old policy stand for the next
year. The Administration is very anxious to have the changes
and the Administrative Staff Council has worked diligently
to develop a reasonable and fair policy. The Personnel
Welfare Committee advises the Administrative Staff Council
to reject the revised policy.

Attachment

lusan Haenepost Darrow
**CONTRACT INFORMATION**

A RECORD OF CHANGES IN AN EMPLOYEE'S CONTRACT STATUS WILL BE MAINTAINED IN THE EMPLOYEE'S PERSONNEL FILE LOCATED IN THE ADMINISTRATIVE STAFF PERSONNEL SERVICES OFFICE.

**Appointment Information**

**APPOINTMENT OF ADMINISTRATIVE STAFF**

Administrative staff members shall be advised in writing at the time of initial appointment of the primary responsibility of the position including title, salary, and pay period.


**Obligation to the University**

An administrative staff member may not accept employment from outside the University that will adversely affect fulfillment of the responsibilities and duties of the assigned position/title.

**Continuity/Termination/Release**

A. **Continuance CONTINUANCE OF CONTRACT**

Appointments to full-time administrative staff positions will be subject to renewal or non-renewal annually, on a fiscal year basis. It is assumed that a full-time administrative staff member will receive successive annual contracts unless:

1. The contract states the contrary.

2. The University has made the decision not to continue employment (RENEW THE CONTRACT SEE NON-RENEWAL OF CONTRACT, BELOW) and has given timely WRITTEN notification TO THE ADMINISTRATIVE STAFF MEMBER as follows:

   a. not later than March 1 of the first, second and third years of contract service if appointment is to expire at the end of one of those fiscal years.

   b. not later than January 1 of any subsequent fiscal year of contract service.

Recommendations for non-renewal (which will include supportive information) will be made to the appropriate supervisor. Whether President, appropriate Vice-President or Dean by -are heads.

**NOTE:** FOR ADMINISTRATIVE STAFF MEMBERS WHOSE CONTRACTS DO NOT BEGIN ON JULY 1, THE ABOVE DATES WILL BE ADJUSTED TO FOUR MONTHS PRIOR TO THE END OF THE CONTRACT FOR PERSONS IN FIRST, SECOND AND THIRD YEARS AND TO SIX MONTHS PRIOR TO THE END OF THE CONTRACT FOR PERSONS IN SUBSEQUENT CONTRACT YEARS OF SERVICE.

7/85 7/86
B. NON-RENEWAL OF CONTRACT

RECOMMENDATION FOR NON-RENEWAL SHALL BE MADE IN WRITING TO THE CONTRACTING OFFICER AND SHALL INCLUDE SUPPORTING WRITTEN DOCUMENTATION.

IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, THE WRITTEN DOCUMENTATION SHALL INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS, UNLESS UNAVAILABLE. IN THE CASE OF FIRST YEAR EMPLOYEES.

IN THE CASE OF NON-RENEWAL BECAUSE OF REORGANIZATION, THE WRITTEN DOCUMENTATION SHALL INCLUDE DETAILS AND RATIONALE OF THE REORGANIZATION, INCLUDING ANY REASSIGNMENT TO EXISTING STAFF OF DUTIES PREVIOUSLY ASSIGNED TO THE NON-RENEWED EMPLOYEE.

C. TERMINATION OF CONTRACT

Termination of the appointment and contract before the end of any contracted term of service shall be referred to as "Termination for Cause." An Administrative Staff Member may be terminated for cause during the Contract Year for the following reasons:

1. conviction of a felony;
2. if credentials are proved to be fraudulent, proof of fraudulent credentials
3. documented significant failure to perform duties and services (as identified in the appointed position or title and/or as may be assigned or changed) to the satisfaction of the staff member's immediate supervisor.
4. documented failure to accept reasonable changes in the job description as required by evolving technology or by changes in university organization, priorities, or resources.
5. documented gross failure to comply with the code of standards and responsibilities for administrators (see page 1).

Recommendations for termination shall originate with the immediate supervisor and shall be sent to the contracting officer via appropriate area or department heads. If the immediate supervisor is a contracting officer, the recommendation is sent to the area vice president or to the president, whichever is appropriate. The final decision to terminate an administrative staff member immediately is made by the contracting officer (or by the vice president or president if the contracting officer is the immediate supervisor). The office of administrative staff personnel services shall be advised of recommendations and decisions concerning termination. In the event of termination, the staff member shall receive 10 working days pay upon dismissal.

- 8.1 -
D. **SUSPENSION**

There are two types of suspension. The first type of suspension is an interim step toward termination. The second type of suspension is disciplinary suspension. Upon the recommendation of the supervisor, the contracting officer may suspend except where the supervisor is the contracting officer in which case the decision shall be made by the area vice president or the president whichever is appropriate.

1. **Suspension as interim step to termination**

Suspension can be invoked during the period in which an employee is being considered for termination. Suspension as an interim step toward termination will include:

- 10 working days pay and pay for unused vacation;
- an opportunity for the suspended employee to continue university health care insurance, at the employee's expense from the first day of the month following the date of the suspension through the resolution of the suspension.

All pay and benefits will be accrued and held in escrow by the university until the termination issue is resolved. In the event the suspension is resolved to the staff member's favor, the staff member shall be entitled to full back pay and benefits, including restoration of vacation days, and records of the suspension shall be removed from the employee's files.

2. **Disciplinary suspension**

Suspension up to 30 calendar days may be used as a disciplinary procedure either in lieu of termination or as a means of dealing with less serious or temporary problems. Such suspension shall be without pay. Vacation cannot be used nor earned. All other benefits will continue as usual.

2. **Dismissal-or-suspension**

Recommendations— for—termination— for—cause— noted— above— shall— be— sent— to— the— President— or— appropriate— Vice— President— with— appropriate— documentation. — After— a— decision— for— dismissal— or— suspension— is— made, — written— notice— shall— be— given— to— the— staff— member— involved— stating— all— provisions— relating— to— that— notice. — The— President— or— appropriate— Vice— President— may— dismiss— or— suspend— the— staff— member— immediately. — In— the— event— of— dismissal— or— suspension, — the— staff— member— shall— be— continued— on— the— payroll— for— fourteen— (14)— calendar— days— following— the— date— of— dismissal— or— suspension. — The— President— or— appropriate— Vice— President— may— continue— the— staff— member— on— suspended— status— with— pay— through— temporary— assignment— to— other— job— responsibilities— until— the— suspension— is— resolved. — In— the— event— the— dismissal— or— suspension— is— resolved— in— the— staff— member's— favor, — the— staff— member— shall— be— entitled— to— full— back— pay— and— benefits— if— the— staff— member— had— been— dismissed— or— suspended— without— pay.

7/85 7/86
E. Release

Release may be effectively in the case of financial exigency, or bona fide discontinuance of a program or departmental/divisional area, and the staff member concerned will be given a minimum of three months written notice, except for the release of persons funded by external grants which shall be contingent upon the availability of said grant funds.

A notice for termination for-cause or release is not affected by Section 1-(Continuance).

- IN THE CASE OF RELEASE BECAUSE OF FINANCIAL EXIGENCY, THE STAFF MEMBER CONCERNED WILL BE GIVEN A MINIMUM OF THREE MONTHS NOTICE.

- IN THE CASE OF RELEASE BECAUSE OF BONA FIDE DISCONTINUANCE OF A PROGRAM OR DEPARTMENTAL/DIVISIONAL AREA, THE STAFF MEMBER IN THE FIRST THREE YEARS OF EMPLOYMENT WILL BE GIVEN A MINIMUM OF FOUR MONTHS NOTICE; THE STAFF MEMBER WITH MORE THAN THREE YEARS OF EMPLOYMENT WILL BE GIVEN A MINIMUM OF SIX MONTHS NOTICE.

- THE RELEASE OF PERSONS FUNDED BY EXTERNAL GRANTS SHALL BE CONTINGENT UPON THE AVAILABILITY OF SAID GRANT FUNDS.
who might be helpful in establishing the facts of the case. In all instances, the administrative staff member or anyone providing information on behalf of that person will be assured that no reprisal will occur at any stage as a result of the complaint.

If the complainant is not satisfied with the results of the investigation by the Office of Affirmative Action, a request for a grievance hearing may be made. In the event that the complainant is not satisfied with the results of the hearing, an appeal may be made to the President of the University. The decision of the President is final.

For specific information regarding the University's affirmative action grievance procedures, you may contact the Office of Affirmative Action or refer to Bowling Green State University's Affirmative Action Plan.

GRIEVANCE AND HEARING PROCEDURES

I. Grievance Procedure

A. Purpose

The purpose of the grievance procedure is to ensure the prompt resolution of complaints by administrative staff members regarding the terms and conditions of employment, salary, benefits, or other job-related concerns. The decision not to continue the contract of an administrative staff member is not grievable, and therefore not subject to this procedure.

Complaints dealing with alleged discrimination will be processed according to the provisions of the University's affirmative action plan.

B. Area review committee

The President (or designee) and each vice president will establish a three-member committee to assist in resolving grievances within the vice-presidential area. Committee members will serve for three years except initial appointments which will be staggered one, two, and three years.

The President (or designee) and each vice president will be responsible for establishing procedures for appointing a chair and for designating the time period for serving in this capacity.

C. Initial review and transmittal of grievance

When a complaint arises, the administrative staff member should first attempt to resolve the issue with the immediate supervisor. Efforts in this direction should be documented. If the grievance is not resolved to the staff member's satisfaction, that person may present the
February 11, 1986

Dear Greg:

Apparently my reply to your request earlier this year concerning Administrative Staff Council participation in Opening Day Ceremonies has been misplaced. I had indicated in that reply that it would not be possible to have the Chair of the Administrative Staff Council be among the presenters at the Convocation. The Convocation is too long as it is, because of the necessity for the President to report on the State of the University which takes a considerable amount of time, and because of the presentation of the other awards. I believe that there are ample opportunities throughout the year for the President and the other constituencies of the University to meet with the Administrative Staff Council.

In my opinion it would be inappropriate to present the Ferrari Award at the Convocation. It is designed to be an award specifically for administrative excellence, and thus the appropriate form for that presentation would seem to be a gathering of administrative employees.

I have included a copy of my January 6 letter to you for your information. Please note that I did not ask you to forward "any suggestions for including Administrative Staff Council in Opening Day Ceremonies" to Dick Eakin. What I did ask was that you forward any suggestion for "additional mention of Administrative Staff Council" to Dr. Eakin.

Sincerely,

Paul J. Olscamp
President

PJO:m
Enclosure
cc: Dr. Richard Eakin

Mr. Greg DeCrane
Chair, Administrative Staff Council
Student Activities and Orientation

"An Environment for Excellence"
ENDORSEMENT

REQUIRED HEALTH CARE COST CONTAINMENT

This endorsement effective September 1, 1986, or the effective date of the Covered Person's coverage, whichever is later, forms a part of the Bowling Green State University Employee Benefit Plan.

Benefit Plans Risk Management, the Plan Supervisor, and Bowling Green State University, the Plan Administrator, agree to the following MANDATORY COST CONTAINMENT provisions as part of the Bowling Green State University Employee Benefit Plan. These provisions are as follows:

I. PRE-ADMISSION CERTIFICATION*

All participants and/or dependents are required to submit Pre-Admission Certification for any elective hospital confinement which is known in advance of the confinement date. Pre-Admission Certification must be submitted to the Plan Supervisor not less than ten (10) days prior to the proposed confinement date. The Covered Person MUST have a Pre-Admission Card completed by the attending physician-surgeon to enable the Plan Supervisor and its professional staff to certify as to the need and services to be provided. Cards are available from the Claims Administrator or the offices of the Plan Administrator. For emergency admissions, notice must be given to the Plan Supervisor within 48 hours following hospitalization. Failure to comply with this provision may result in a 20% reduction or disallowance of benefits.

II. PRE-ADMISSION TESTING*

When hospital confinement is anticipated, routine admission testing must now be done on an out-patient basis prior to confinement for full coverage. Hospital charges for Pre-Admission Testing will be paid in full. Pre-Admission Testing includes X-ray or laboratory examinations that are (a) provided within 10 days immediately prior to hospital confinement as an in-patient; and (b) performed in connection with the illness or injury requiring the stay. Failure to comply may result in denial of hospital benefits for any day(s) when services should have been rendered on an out-patient basis.

*Subject to Faculty Senate approval.

Arm Staff Council
Classified Staff
III. SECOND SURGICAL OPINION

When non-emergency surgery has been recommended, a second opinion by a recognized specialist in the field (but not associated with the primary surgeon) concurring with the recommendation is required for full coverage. Reasonable and customary charges for Second Surgical Opinions will be paid in full. If the first and second opinions are in conflict, a third opinion will be allowed at reasonable and customary charges. A 20% reduction in both the surgeon's and hospital's eligible charge reimbursement may result when surgeries are performed without a second surgical opinion where required. The Plan Supervisor can assist the Covered Person through either telephone contact or the Pre-Admission Certification card. Surgeries requiring a second opinion for full coverage are as follows:

1. Adenoidectomy
2. Foot Surgery
3. Cardiac Surgery**
4. Cataract
5. Cholecystectomy
6. Dilatation & Curettage (D&C)
7. Ear Drum Surgery
8. Endarterectomy
9. Gastrointestinal By-pass
10. Hemorrhoidectomy
11. Hernia Repair
12. Hysterectomy
13. Joint Surgery**
14. Mammoplasty
15. Mastectomy
16. Ovarian Surgery
17. Prostate Surgery
18. Septoplasty
19. Sinus Surgery**
20. Spinal Surgery**
21. Submucous Resection
22. Thyroidectomy
23. Tonsillectomy
24. Varicose Veins

**Excluding diagnostic expenses.

IV. POST-PROCEDURE REVIEW

When hospital confinement occurs, the Plan supervisor and its professional staff will communicate with the primary physician and/or the hospital in an on-going effort to determine quality and extent of present and future care. Where agreement is reached between the Plan Supervisor and the providers of care, it will be necessary that the Covered Person comply with the recommended course of care. Failure to comply may result in a 20% reduction or denial of hospital benefits.
MEMORANDUM

TO: Dr. Richard Eakin  
   Vice President for Planning & Budgeting

FROM: Gregg DeCrane  
   Chair, Administrative Staff Council

DATE: April 8, 1986

SUBJECT: Handbook Changes

ASC took the following action at its April 3 meeting relative to your concerns expressed at our Thursday morning meeting regarding Administrative Staff Handbook revisions.

1. Title Page

   A. Accepted Administrative Council's addition of "and becomes effective for subsequently signed contracts" to the sentence that reads, "The 1985-86 Handbook . . . ."

   B. Suggested and passed the changing of the last paragraph to eliminate the word "annually".

2. Fee Waiver Policy

   A. Accepted Administrative Council's approval of the reduction of the waiting time from 5 years to 3 years for employee dependents.

   B. Accepted Administrative Council's change in policy to allow for dependent fee waiver for a period of 5 years after the retirement of the employee regardless of their participation in the Supplemental Retirement Program.

3. Vacation Policy

   A. 1) Accepted Administrative Council's recommendation of a 22 day per year vacation with unlimited accrual during the year and a maximum of 44 days accrual at the end of the contract year and at termination of employment.

      2) Since the Administrative Council's discussion was based upon the fact that the majority of Ohio's four year post secondary schools offer 22 days of vacation, the ASC hopes that this majority will serve as an index for future adjustment.

   E. There were regrets that the graduated accrual proposed by ASC, which would reward long term employees, was not favorably received.

   C. There was also concern that any conversion from a 9 month contract to a twelve month contract would not be adversely affected by the increased accrual. The current 9/11 formula is based on 20 working days vacation.
4. Non-renewal of Contract
   A. Tabled so that further review of Administrative Council's proposed changes may be made.

5. Termination of Contract
   A. Tabled so that further review of Administrative Council's proposed changes may be made.

6. Suspension
   A. Tabled so that a new proposal that addresses two forms of suspension may be drawn up.

7. Release
   A. Tabled so that further review of Administrative Council's proposed changes may be made.

The Personnel Welfare Committee and the ASC Executive Committee are currently working on 4, 5, 6 and 7 but no resolution looks possible for the May Trustee's meeting. If a meeting between yourself and members of the Executive Committee and/or Personnel Welfare Committee would be helpful in clarifying or resolving specific issues, we would be more than willing to do so.

CD:dkh

MEM/64-65

pc: ASC Executive Committee
Personnel Welfare Committee
April 10, 1986

MEMORANDUM

TO: Paul D. Yon, Chair
Administrative Staff Council
Personnel Welfare Committee

FROM: Eloise E. Clark, Vice President for Academic Affairs

I am responding to your March 13 memo regarding across-the-board increments. In checking our records, it appears that it has been very rare indeed when a person's across-the-board increment has been withheld. Those instances involved persons who were being terminated or who were leaving under unusual circumstances. Although there was an attempt some years ago to designate the across-the-board increment as a "general increase" or "satisfactory performance" increase, it does not seem to have taken hold. It does appear, therefore, that at this time, the across-the-board increment is awarded to everyone, except in such rare instances as noted above. I appreciate your bringing this question to my attention.

skg
Bowling Green State University

Life Insurance (Term Insurance)

Benefit Formula

Age Reduction Provision

Waiver of Premium

Dependent Life Coverage

Funding Method

(Fully Insured) Premium Rate per $1,000

Accidental Death and Dismemberment

Travel Accident Insurance

Long Term Disability Insurance

Elimination Period (Period of Disability Required Before Benefits Begin)

Benefit Formula (% of Salary/Benefit max.)

Social Security Offset

Duration of Benefit Payment

Cost of Living Adjustment to Benefits

Minimum Benefit

Current Benefits

Proposed Changes

2 1/2 x salary
Min. $30,000/Max. $150,000

None

Yes

Yes

Experience-Rated - Looked at Every Year

$.28

(.04 AD&D)

2 1/2 x salary
Min. $30,000/Max. $150,000

$50,000 -

6 months

60% to $2,000

Primary/Family

To age 65-70

No

No
Rehabilitation Provision

Survivor's Benefit

Minimum Indemnity Schedule

Funding Method

Premium Rate Factor per $100 of Covered Payroll

Basic Medical Plan

Hospital Benefits

Surgical Benefits

Doctors' Visits In-Hospital:

Per Day -
Maximum Days

X-Ray and Lab. Benefits:

Inpatient -
Outpatient -

Emergency Treatment:

In-Hospital

Doctor's Office

Major Medical Plan

Deductible

Calendar year

$100 per disability ($400 -> rise to $750 for those not covered under base plan)

Offset 100%

No

No

Pooled

.13%

120 days S.P.

Unlimited Misc. Expenses

Usual, customary and reasonable

UCR

120

UCR

UCR

UCR for accident treatment

UCR for accident treatment
Family Deductible $100 per person

Co-Insurance 80/20%

Out of Pocket Limit $1,000 per disability

Family Out of Pocket Limit $1,000 per person/disability

Maximum Benefit Unlimited

Mental and Nervous, Alcoholism or Drug Addiction Condition

In-Hospital Benefits Same as Other

Out of Hospital Benefits $20,000 lifetime limit, 50% of UCR to max. of $500 per calendar year; then 80% for duration of benefit period

Cost Containment Provision

Preadmission Certification
Preadmission Testing
Second Opinion Provisions
Outpatient Surgery
Hospice Coverage
Generic Drug Incentive 100% paid
Alternative Birthing Facilities
Emergency Room Controls Yes
Home Health Care Yes
Preventative Care
Weekend Admission Limitation
Employee Hospital Bill Audit 50% of Such Amount to Employee
Health Risk Screening
Wellness Programs

Average Claim Cost per Employee (Employee/Dept. Claims & Employees) $1,225
Retention or Administrative Charge (96 of Premium)
1984 Medical Premium

1984 Medical Premium Rates (Fully Insured Equivalent)

Dental Benefits
Deductible(s)

$25 cal. yr.
all except prev. & diag.

Coinsurance Factors
Prevention & Diag.
Basic
Major
Ortho

Benefit Limits
All Except Ortho
Ortho

Pre-Treatment Review

Yes - when course of treatment to exceed $300

1984 Dental Premium Rates (Fully Insured Equivalent)

Miscellaneous

Family Coverage
Ortho

Yes
Kids to age 19
Maternity Benefits at other Ohio Universities

OSU - considered as any other leave of absence without salary or medical leave of absence. Must have definite beginning and ending dates.

OU - no reference to maternity leave

UC - Leave without pay - not to exceed 6 months for illness, 1 year for other than illness. Maternity leave without pay. Boss may advise pregnant to transfer to a less taxing job. If pregnant woman does not apply for transfer, leave without pay for up to 6 months -- but only upon presentation of medical evidence as to probable date employee will return to same or similar position. Use accrued sick leave and vacation leave. If the employee cannot return when had anticipated, may go on disability leave.

Central State - May take unpaid leave if physician certifies that the woman cannot work. If more than 4 months before due date or 2 months after birth the University may request a physician review the case for disability. If the employee has completed 1 year and has exhausted sick leave and vacation time, may be granted 1 year disability leave if the physician declares the woman is disabled. In such a case the University provides insurance coverage during the year of disability.
V. Summary of the Results of the Study

In summarizing the results of the Contract Staff Classification study, the Committee has focused its attention in three areas: a) the development of position descriptions and position profiles; b) the description of the demographic make-up of contract positions; and c) the analysis of the numerical ranking of positions resulting from the point-factor evaluation of position questionnaires. Together, these provide an extensive data base concerning contract staff positions at BGSU.

A. Position Descriptions & Position Profiles

Information used in developing position descriptions was taken from the job content section of the position questionnaire. The key aspects of each job as described by the incumbent were listed on the position description. In addition to information that identifies the title, work area, and supervisor of the position, each position description also lists the minimum qualifications for the position (amount of education and work experience, and licensing, if any). The position descriptions are designed to be a summary of tasks and responsibilities.

Since each position description is based primarily on the job content section of the questionnaire, the Committee felt that additional valuable information about each position could be obtained from the remaining seventeen questions which addressed the compensable factors. Summary sheets listing the actual response to each question were developed. These summary sheets, called position profiles, show the responses the Committee determined to be appropriate in its evaluation of questionnaires, which may not have been the same responses listed by the incumbent.

The combination of the position description and the position profile provides a summary of each position. This information will be useful in addressing the long-range focus of the study - development of a comprehensive personnel system for contract staff at BGSU. The Committee feels that these materials provide a basis for comparing the relative worth of positions and for identifying career paths within the University. The position descriptions and position profiles were compiled under separate covers for review with this final report. (See Attachments A & B).
B. Demographic Make-up of Contract Positions

A review of the questionnaire items revealed some interesting facts about the 273 contract staff positions included in the study. Eighty-four percent of positions require at least a Bachelor's degree (more than 50% require a Master's or higher). A majority of positions, at the same time, require up to a maximum of three years related work experience. Licensing is required of only 18 positions (7%).

Seven percent of all contract positions require frequent (two or more times per month) overnight travel; and 24% require day trips at the same frequency.

A review of the overtime statistics revealed that 34% of contract positions (92) require incumbents to work no more than 40 hours per week. The remaining 66% regularly work from one to more than seventy hours per month in addition to the prescribed 40-hour workweek.

Only fifty-seven positions (21%) are exposed to physical hazards. Of those, only 23% are exposed to hazards of potentially disabling severity.

Fifty-one percent of all contract positions perform their duties with minimal supervision ("Direction" or "General Direction"). More than 70% perform only a recommending function in the various personnel decisions (evaluating performance, awarding salary increments, promoting, reclassifying, authorizing new positions, hiring, terminating, and disciplining personnel).

Thirty-nine percent of contract positions have primary signatory authority for budgets, while fifty-five percent of all positions perform some budgetary tasks without signatory authority.

In evaluating question #14 on decision-making, three levels of decisions were considered: a) decisions guided by defined procedure; b) those requiring selective use of established procedures with some flexibility for deviation from procedure; and c) those for which precedent is generally lacking and which result in the establishment of policy or procedure.

Nearly all positions perform the lowest level of decision-making at least several times per year. Seventy-three percent make these decisions either daily or weekly. At the highest level of decision-making, only 37% of the positions were involved, most making such decisions no more than several times per year. Figure 1 on page 17 shows the distribution of the three levels of decisions.
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 graduate 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:

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<tr>
<th>Total</th>
<th>192</th>
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</thead>
<tbody>
<tr>
<td>3-5 yrs experience</td>
<td>24</td>
</tr>
</tbody>
</table>

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:

<table>
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<th>Spouse</th>
<th>9</th>
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<tbody>
<tr>
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<td>4</td>
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<tr>
<td>Full-time</td>
<td>2</td>
</tr>
<tr>
<td>Part-time</td>
<td>2</td>
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<table>
<thead>
<tr>
<th>Graduate</th>
<th>5</th>
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<tbody>
<tr>
<td>Full-time</td>
<td>0</td>
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<tr>
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<td>5</td>
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<table>
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<tr>
<td>Full-time</td>
<td>1</td>
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<tr>
<td>Part-time</td>
<td>1</td>
</tr>
</tbody>
</table>
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  ____Married

Is spouse employed at BGSU?  ____Yes  ____No

If 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
ADMINISTRATIVE STAFF COUNCIL
PERSONNEL WELFARE COMMITTEE REPORT
VACATION POLICY

During the Fall Semester, 1984 the Administrative Staff Council's Personnel Welfare Committee was asked to review Bowling Green State University's vacation policy for non-academic contract employees in an effort to determine its position with other regional and in-state publicly supported universities. With the assistance of the Office of Administrative Staff Services, more specifically Susan Caldwell, ten Ohio supported universities, the Medical College of Ohio, and one Michigan university (Central Michigan) were contacted and asked to furnish data on current vacation policy for non-academic contract employees. Cooperating institutions were asked to address three areas of their vacation policy. These areas include: 1) the annual rate of accrual, 2) the maximum accrual, and 3) the number of vacation days paid at termination.

The vacation policy for contract/non-academic staff has been extensively discussed for decades. These discussions are reflected in the minutes of the Personnel Services Advisory Committee. President Ralph McDonald, in a memorandum sent to university employees/administrators on 4 May 1955 set the total number of vacation days for "other Full-time Twelve-months employees" at twenty days. Later, on 20 March 1973 the Personnel Services Advisory Committee recommended to President Moore and Vice President J. Scheweerman changes in the Administrative Staff's vacation/sick/leave of absence policy. In short, the recommendation called for an increase in vacation days based on the number of years of service. This recommendation was to be submitted to the Board of Trustees for their consideration at the following April or May meeting; however, it apparently died in committee. Later, in 1981 the Personnel Services Advisory Committee again addressed vacation benefits for Administrative Staff. The committee again recommended that vacation for the abovementioned staff be based upon longevity or "at least grant five (5) weeks vacation to those employees who have completed twenty-five (25) years of service." This time the committee also addressed the question of maximum vacation accrual. They recommended that the total number of weeks accrual should be determined by the total number of years of service (enclosed). Again, no apparent action was taken.

As of February 1986 all full-time twelve-month administrative staff earn vacation time at the rate of twenty days (20) for each year of service. A maximum of forty days of vacation may be accumulated at any one time. The maximum amount of vacation days that will be paid at termination/death is forty (40). (The current policy, as indicated in the 1985-86 Administrative Handbook is included.)

Findings: ANNUAL RATE OF ACCRUAL. At 20 days vacation, BGSU ranks in the lower thirty percent (30%) behind the University of Toledo (24), Akron (22), Cincinnati (22), Cleveland State (22), Miami (22), Ohio State (22), Ohio University (22), Wright State (22), and Youngstown (22). Only BGSU, MCO, Central Michigan, and Kent State have an equal amount of days.
MAXIMUM ACCRUAL. At forty (40) days vacation, the BGSU position is in sixth place and shares that position with MCO and Miami University. Although five schools record fewer maximum accrual days; BGSU, nevertheless, trails the University of Toledo (72), Cincinnati (66), Kent State (60), Cleveland State (44), and Wright State (44) by as much as thirty-two (32) days.

PAYMENT AT TERMINATION. At forty (40) days vacation BGSU is tied for fifth with Miami University. However, BGSU continues to trail Cincinnati (66), Kent State (60), University of Toledo (48), and Wright State (44).

RECOMMENDATIONS:

1. That the annual rate of vacation accrual be increased from twenty (20) to twenty-four (24) days per year.

2. That the maximum accrual days be based on accumulative full-time years of service and be revised as follows:* 

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>40</td>
</tr>
<tr>
<td>6-10</td>
<td>45</td>
</tr>
<tr>
<td>11-15</td>
<td>50</td>
</tr>
<tr>
<td>16-20</td>
<td>55</td>
</tr>
<tr>
<td>21-25</td>
<td>60</td>
</tr>
<tr>
<td>26+</td>
<td>65</td>
</tr>
</tbody>
</table>

3. That payment at retirement, termination, or death remain at forty (40) vacation days.

   *No more than forty days vacation may be taken within a twelve consecutive month period.

JUSTIFICATION:

1. Typically, Administrative Staff work more than forty hours per week and do not receive overtime, compensatory time, or other paid benefits for these extra hours. A more generous vacation policy will help prevent professional "burnout" by allowing more flexibility in scheduling.

2. There will be no anticipated increased costs to the University.
3. Increasing the annual rate of accrual and the maximum accrual will coincide with the current University Role and Mission Statement by serving as an incentive to attract the most qualified administrative staff to assist with and support the attainment of the goals of productive research, quality education, and scholarly achievement.

4. By increasing the annual rate of accrual and the maximum accrual, BGSU will be more competitive not only within the state but within Northwest Ohio, more specifically with the University of Toledo.

5. Increasing the maximum accrual would serve as a concrete way of rewarding and encouraging administrative staff who have been employed at BGSU for more than five years, as well as those employed less than five years (196 or 54%). It would strengthen the employee's commitment, increase morale, and serve as a long term incentive in those who have become more valuable with experience. It also may serve to reduce the amount of administrative staff turnover, which is currently 11.08 percent per year.

It is proposed that the policy be implemented on 1 July 1986. This policy also would be applicable to employees who have accrued vacation during 1985-1986.
1. The amount of vacation time for each employee shall be computed by
the administrative officer of the department in which he is employed, on the
following basis:

Group I. Members of the teaching faculty. Employees whose
duties consist primarily of teaching have approximately three
weeks of vacation time available during the Thanksgiving,
Christmas, and spring holiday recesses in the academic year.

Group II. Classified employees. This category includes all
Civil Service workers and all local employees engaged in the
same kind of work as classified employees under State Civil
Service law. Each employee in this group is entitled to va-
cation time of two calendar weeks a year, in addition to legal
holidays. Employees who have less than one year of service
are entitled to one working day of vacation leave for each
month of service during the calendar year.

Group III. Other full-time twelve-months employees. This
category includes all year-round employees of the University
who are working on a full-time basis, other than teaching
faculty members and classified employees.

Subgroup A. Administrative officers, head residents
of University residence halls, librarians with faculty
rank, managers of University dining halls, and all
other specifically designated professional personnel
whose regular duties involve varied and extended over-
time service without added compensation. Each
employee in this group is entitled to four calendar
weeks of vacation a year, in addition to legal holidays.

Subgroup B. Other employees in Group III. Each
person in this subgroup is entitled to two weeks of
vacation a year, in addition to legal holidays.

Group IV. Persons employed on a full-time basis for less
than one year. A person in this category is entitled to a por-
tion of the full year's vacation leave corresponding to the
portion of the calendar year he is employed. For example, a
person employed full time for ten months is entitled to ten-
weeks of the regular yearly vacation allowance made for
persons doing the same kind of work on a year-round basis.

Group V. Persons employed on a part-time basis. An em-
ployee in this category is entitled to one day of vacation leave
for each 24 days worked.
Group VI. Persons employed on an hourly basis. One day of
vacation leave is granted for each 160 hours worked by such
an employee; provided, however, that the total vacation leave
for such employee shall not exceed two calendar weeks during
the year.

2. The vacation year for employees in Groups III and IV shall be from
September 1 through the following August 31. The vacation year for employees
in Groups II, V, and VI shall be from January 1 through December 31.

3. Vacation time earned during the vacation year shall be taken by the
employee during that year; such vacation time is not cumulative from one
vacation year to the next. The justification for paid vacations lies in the fact
that the quality of service to the University is enhanced as a result of the
employee's rest and relaxation. Therefore, administrative officers shall
insist upon each employee taking a vacation leave during the vacation year
as indicated above. Exceptions to this policy shall be made only with the
specific approval of the President of the University.

4. The vacation dates for an employee shall be determined by the adminis-
trative officer in charge of the department in which he is employed, subject to
approval by Mr. Bunn for all persons employed in departments under his super-
vision, and subject to the approval of Dean Harsman for all employees in other
University departments except the President's Office.

5. The administrative officer shall arrange for the vacation of each em-
ployee at a time when the employee's absence involves least interference with
the work of the department in which he is employed. Ordinarily, vacation leave
for persons employed in departments other than Maintenance shall be taken
during the period from June 1 to September 1 or during the Christmas and
spring recess periods. Exceptions to this policy of concentrating vacations in
the summer months and academic recess periods shall be made only with the
specific approval of the President of the University.

6. Vacation schedules for all employees shall be determined as far in
advance as possible. All vacations to be taken by present employees before
September 1, 1955, shall be planned and approved before June 1, 1955.

7. Administrative officers shall transmit duplicate copies of vacation
schedules for all employees under their supervision by June 6, 1955, to
Messrs. Bunn and Harsman, who will in turn approve and transmit one set
of copies of such schedules to the Business Office. These schedules should
show also the number of vacation days each employee has already taken during
his current vacation year.

8. Any employee wishing to have his pay check delivered to him in other
than the usual manner during his vacation leave shall transmit such request
through his supervising administrative officer at the time his vacation
9. For each legal holiday officially set aside by the University occurring during an employee's vacation period, one day shall be added to his total vacation leave.

10. The regular recesses in the academic calendar—Thanksgiving, Christmas, spring holidays, etc.—are vacation time for teaching staff members only. Time taken off by other employees during such periods shall be counted as a part of their regular vacation allowances.

11. An employee of the University shall be fully compensated at his regular rate of pay for all vacation time taken in accordance with the policies set forth in the preceding paragraphs.

April 18, 1955

Ralph W. McDonald
President
UNIVERSITY POLICY ON VACATIONS

The following amendments and interpretations are supplementary to the basic policy as outlined in the memorandum of April 18, 1955.

1. "Two weeks of vacation" is intended to mean twelve working days; "three weeks" is intended to mean eighteen working days; "four weeks" is intended to mean twenty-four working days. Since the University has a five-and-one-half day working week, this means that a person with two weeks of vacation would have one additional day of vacation beyond two calendar weeks; that a person with four weeks of vacation would have two additional vacation days beyond four calendar weeks.

2. Employees in Group II, ordinarily entitled to two calendar weeks of vacation a year, shall be entitled to three weeks of vacation a year after twelve years of full-time service in the University (or after a total of fifteen years of full-time employment by the State of Ohio, including service in other State agencies as well as in the University).

3. An employee in Group II, V, or VI, whose vacation year is from January 1 through December 31, may take his vacation anytime during that year or anytime up to the following September 15, if the administrative officer in charge wishes to make such an arrangement.

4. An employee in Group III or IV, whose vacation year is from September 1 through August 31, may take his vacation during that year or up through the following September 15, if the administrative officer in charge wishes to make that arrangement.

5. In any individual case where unusual circumstances, previous commitment, the welfare of the University program, or personal hardship may indicate the desirability of a more flexible arrangement regarding vacation, the administrative officer in charge shall indicate the circumstances in a memorandum to the President and request approval for an appropriate adjustment. Any reasonable adjustment will be carefully considered, and all such adjustments that are in general accord with the broad intent of the University vacation policy will be approved. Specific approval by the President's office of each such exception is necessary, however, in order that practices throughout the many departments of the University may be reasonably comparable and adequate records maintained regarding all exceptions.

May 4, 1955

Ralph W. McDonald
President
MEMORANDUM

TO: Dr. Hollis A. Moore
Mr. J. C. Scheuerman

FROM: Personnel Services Advisory Committee

SUBJECT: Recommended Policies for Vacation, Sick Leave and Leave of Absence

On October 26, 1973, the Personnel Services Advisory Committee was appointed by the President to establish several policies and procedures for unclassified employees (contract, non-academic). The minutes of all committee meetings to date have been forwarded to your office, including recommendations concerning insurance and other benefits.

Attached herewith are three additional recommendations:

1. Vacation policy
2. Sick Leave policy
3. Leave of Absence policy

The following notes may provide helpful background information:

1. In keeping with the Affirmative Action Program, these recommendations are in general agreement with those presently applicable to classified employees.

2. It is assumed that because of the nature of contract responsibilities, most contract employees will work considerably more than an average 40-hour work week. In recognition thereof, for many years the minimum vacation earned has been four weeks per year.

3. Until recently, all classified employees received only two weeks of vacation, regardless of the number of years of service. However, in accordance with recent changes in the state law, classified employees now receive three weeks of vacation after ten (10) years of service, and four weeks of vacation after twenty (20) years.

4. Therefore, it is also recommended that contract employees earn vacation based upon similar years of service at BGSU as proposed in the vacation policy.
If your office (or others) desires additional information, please advise. The current vacation policy was adopted in 1955 (copy attached); however, it was not approved by the Board of Trustees (verified by Dr. McFall's office).

Committee Members:

F. E. Beatty
Roy Clark
Paul R. Nusser
John D. Hayes
Ray Malone
Robert McKay
Carol Payne
Richard Stoner
Marilyn Shepherd
Ray Whittaker
Charles Gallagher, Ex Officio
Elton Ringer, Chairman

Attachments
RECOMMENDED VACATION POLICY FOR NON-ACADEMIC CONTRACT EMPLOYEES

All full-time, twelve-month, non-academic contract employees earn annual vacation in accordance with the following schedule:

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Vacation Per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year of service</td>
<td>No Vacation*</td>
</tr>
<tr>
<td>One year, but less than 10 years</td>
<td>20 work days</td>
</tr>
<tr>
<td>Ten years, but less than 20 years</td>
<td>25 work days</td>
</tr>
<tr>
<td>Twenty years or more</td>
<td>30 work days</td>
</tr>
</tbody>
</table>

*Employees with less than 1 year of service may take (borrow) 5 days vacation after each three months of service. However, if an employee terminates employment before completing one year of service, his/her termination check shall be reduced by the amount of vacation taken.

Employees are expected to utilize their vacation annually and at a time approved by the area supervisor. Absences chargeable to vacation are to be reported to the employee's area administrator (or his designee) who will maintain vacation records.

Vacation is computed from initial date of employment. Accumulated vacation up to a total of that earned in two years may be carried into a new contract year. Upon termination of employment, compensation for accrued vacation will be paid in a lump sum.

If an employee has interrupted service with the University (other state agencies excluded), his/her prior full-time employment period with the University shall be counted for determination of vacation earned.

Days designated as holidays shall not be charged against vacation.

Vacation is earned while an employee is on an active pay status; it is not earned while on unpaid leave of absence.

Vacation pay is not granted in lieu of vacation except at termination of employment.
In case of death, unused vacation will be paid in accordance with Section 2113.04 of the Ohio Revised Code.

This policy excludes Medical Doctors, Residence Hall Directors, Housemothers and other employees whose contract period is for less than twelve months inasmuch as they have time off with pay during shut-down periods between quarters, holidays, or summer.
**VACATION BENEFITS**
(Detailed in Separate Exhibit)

**Classified Employees.**

Vacation benefits for classified employees are determined by the State. Vacation is earned on the basis of longevity, with a maximum of 5 weeks upon completion of 25 years of service:

<table>
<thead>
<tr>
<th>Years</th>
<th>Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 7</td>
<td>2</td>
</tr>
<tr>
<td>8 - 14</td>
<td>3</td>
</tr>
<tr>
<td>15 - 24</td>
<td>4</td>
</tr>
<tr>
<td>25 Years and Over</td>
<td>5</td>
</tr>
</tbody>
</table>

**Contract Employees.**

Contract employees receive 4 weeks of vacation, regardless of longevity; however, Library employees receive several additional days of vacation. (24 days Lib)

The Personnel Services Advisory Committee recommended that contract employees should also earn vacation based upon longevity—or to at least grant 5 weeks to those completing 25 years of service (which would be consistent with the classified policy). To avoid possible inequities, perhaps the 5 weeks policy and the Library differential should be reviewed again.

**Maximum Vacation Accrual.**

Similarly, the maximum vacation accrual is considerably more liberal for classified employees (a maximum of 15 weeks after 25 years of service—as listed below), as compared with 4 weeks beyond one's anniversary date for all contract employees regardless of the number of years of service:

<table>
<thead>
<tr>
<th>Years</th>
<th>Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 7</td>
<td>6</td>
</tr>
<tr>
<td>8 - 14</td>
<td>9</td>
</tr>
<tr>
<td>15 - 24</td>
<td>12</td>
</tr>
<tr>
<td>25 Years and Over</td>
<td>15</td>
</tr>
</tbody>
</table>

To partially close the differential, perhaps after 15 years (or 25 years), contract employees might be given an additional 4 weeks of accrual.
VACATION POLICY (Current)

All full-time, twelve-month, administrative staff members earn vacation time at the rate of twenty days for each year of service. During the first year of employment, the twenty days are accrued but may not be used until the first year's employment is completed. For example, if employment begins on July 1, 1982, the employee would be eligible to take twenty days of vacation on July 1, 1983 -- but not before. After the first year of employment, vacation is earned and may be utilized on a monthly pro-rata basis, i.e., 1 2/3 days per month. Records of vacation should be maintained by the staff member's supervisor or a designee on a monthly basis, with accrual, use and balance noted.

Vacation is earned while a staff member is in an active-pay-status with Bowling Green State University. It is not earned while on an unpaid leave of absence or while employed elsewhere.

Staff members are expected to utilize their vacation annually and at a time approved by the area supervisor. A maximum of forty days for vacation may be accumulated at any one time. It is expected, however, that no single vacation leave taken will exceed 20 consecutive working days unless approved in advance by the supervisor.

For the convenience of scheduling vacations at the most appropriate time, area supervisors with the approval of the President, Dean, or a Vice President, may authorize vacation leave in advance of accumulated leave, provided that should the staff member terminate employment, the termination check shall be reduced by the amount of used but unearned vacation.

Vacation pay is not granted in lieu of vacation except at termination of employment and such terminal compensation will be paid in a lump sum. The maximum amount of terminal compensation will be forty days. In case of death, unused vacation will be paid in accordance with Section 2113.04 of the Ohio Revised Code.

This policy excludes medical doctors, residence hall directors, unit directors, and employees whose contract period is for less than twelve months and who have time off with pay during academic recess between semesters, during breaks, holidays, or summer. Administrative staff members who are contracted for 12 months but who work only part of each week earn vacation on a prorated basis. For example, an employee contracted to work fifty-percent for 12 months and works part of each week, earns vacation at one-half the normal rate. Part-time 12-month administrative staff members who have completed the equivalent of one full year of service at Bowling Green State University are eligible to utilize earned vacation. At the time of separation from employment with the University, part-time administrative staff are not eligible for payment of unused vacation credit.

The President or Vice Presidents shall be responsible for implementing this policy, for authorizing modifications for unusual circumstances, and for establishing procedures for the maintenance of current vacation leave records.

At the end of each fiscal year, every staff member will submit to Administrative Staff Personnel Services a form approved by the immediate supervisor summarizing vacation use, accrual, and balance for July-December and January-June for that year. That form is placed in the staff member's personnel file located in the Office of Administrative Staff Personnel Services.

Questions about the vacation policy and procedures should be addressed to the Office of Administrative Staff Personnel Services.
<table>
<thead>
<tr>
<th>Days</th>
<th>Count</th>
<th>University/College</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>1</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>22</td>
<td>8</td>
<td>Akron, Cincinnati, Cleveland, Miami, Ohio State, Ohio University, Wright State, Youngstown</td>
</tr>
<tr>
<td>20</td>
<td>4</td>
<td>BGSU, Central Michigan, Kent (25 days after 25 yrs), Medical College of Ohio</td>
</tr>
</tbody>
</table>

### Maximum Accrual

<table>
<thead>
<tr>
<th>Days</th>
<th>Count</th>
<th>University/College</th>
</tr>
</thead>
<tbody>
<tr>
<td>72</td>
<td>1</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>66</td>
<td>1</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>60</td>
<td>1</td>
<td>Kent State University</td>
</tr>
<tr>
<td>44</td>
<td>2</td>
<td>Cleveland State, Wright State</td>
</tr>
<tr>
<td>40</td>
<td>3</td>
<td>BGSU, Medical College of Ohio, Miami University</td>
</tr>
<tr>
<td>33</td>
<td>2</td>
<td>Ohio University, Youngstown</td>
</tr>
<tr>
<td>30</td>
<td>1</td>
<td>Ohio State University</td>
</tr>
<tr>
<td>22</td>
<td>1</td>
<td>Akron University</td>
</tr>
<tr>
<td>20</td>
<td>1</td>
<td>Central Michigan</td>
</tr>
</tbody>
</table>
## PAYMENT AT TERMINATION
(Thirteen Schools Examined)

<table>
<thead>
<tr>
<th>Days</th>
<th>Count</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>66</td>
<td>1</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>60</td>
<td>1</td>
<td>Kent State</td>
</tr>
<tr>
<td>48</td>
<td>1</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>44</td>
<td>1</td>
<td>Wright State</td>
</tr>
<tr>
<td>40</td>
<td>2</td>
<td>BGSU</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Miami</td>
</tr>
<tr>
<td>30</td>
<td>2</td>
<td>Ohio University</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ohio State University</td>
</tr>
<tr>
<td>22</td>
<td>2</td>
<td>Akron</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cleveland State</td>
</tr>
<tr>
<td>20</td>
<td>2</td>
<td>Central Michigan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Medical College of Ohio</td>
</tr>
<tr>
<td>0</td>
<td>1</td>
<td>Youngstown (extend termination date)</td>
</tr>
</tbody>
</table>
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 Pole 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.
### Responses:

<table>
<thead>
<tr>
<th>Experience</th>
<th>Total</th>
<th>3-5 yrs experience</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>192</td>
<td>24</td>
</tr>
</tbody>
</table>

### Marital Status:

<table>
<thead>
<tr>
<th>Status</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married</td>
<td>21</td>
</tr>
<tr>
<td>Single</td>
<td>3</td>
</tr>
</tbody>
</table>

### Spouse employed at BGSU:

<table>
<thead>
<tr>
<th>Yes/No</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>8</td>
</tr>
<tr>
<td>No</td>
<td>13</td>
</tr>
<tr>
<td>If yes, full-time</td>
<td>7</td>
</tr>
</tbody>
</table>

### If available, would dependent use fee waiver:

<table>
<thead>
<tr>
<th>Spouse</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>4</td>
</tr>
<tr>
<td>Full-time</td>
<td>2</td>
</tr>
<tr>
<td>Part-time</td>
<td>2</td>
</tr>
<tr>
<td>Graduate</td>
<td>5</td>
</tr>
<tr>
<td>Full-time</td>
<td>0</td>
</tr>
<tr>
<td>Part-time</td>
<td>5</td>
</tr>
<tr>
<td>Children</td>
<td>2</td>
</tr>
<tr>
<td>Full-time</td>
<td>1</td>
</tr>
<tr>
<td>Part-time</td>
<td>1</td>
</tr>
</tbody>
</table>
**PART I**

Questions are stated below with the possible responses and percentages of those responses. Columns identify the total population and each area of the population as follows:

<table>
<thead>
<tr>
<th>A. Total population</th>
<th>B. Academic Affairs</th>
<th>C. Planning and Budgeting</th>
<th>D. Operations</th>
<th>E. Student Affairs</th>
<th>F. University Relations</th>
<th>G. Presidential</th>
<th>H. Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Assigned area:
   a. Academic Affairs 26.02
   b. Planning and Budgeting 16.44
   c. Operations 13.01
   d. Student Affairs 21.92
   e. University Relations 10.96
   f. Presidential 6.25
   g. Other 4.80

2. Length of time employed at BGSU:
   a. Less than 6 months 2.05 25.26 0.00 3.13 0.00 0.00 0.00 0.00
   b. 3 months to 2 years 23.69 2.33 0.00 13.75 6.25 30.00 0.00
   c. 2 years to 5 years 18.42 20.53 15.79 12.75 31.25 10.00 11.43
   d. 5 years to 10 years 33.16 26.32 37.50 26.32 28.13 21.25 20.00 14.22
   e. over 10 years 6.04 26.32 33.33 57.89 31.25 31.25 40.00 14.22

3. Length of time in your present position:
   a. Less than 6 months 4.11 10.53 0.00 0.00 3.13 0.00 0.00 14.29
   b. 3 months to 2 years 24.66 26.32 25.00 21.05 25.00 12.75 19.00 14.29
   c. 2 years to 5 years 34.58 33.33 31.53 31.25 43.75 20.00 57.14
   d. 5 years to 10 years 21.23 15.79 25.00 36.24 15.63 25.00 20.00 14.29
   e. over 10 years 15.07 13.16 16.67 10.53 21.32 12.50 20.00 0.00
   f. missing 0.68 0.00 0.00 0.00 3.13 0.00 0.00 0.00

4. Current employment status:
   a. Full-time 96.58 39.47 95.83 100.00 100.00 100.00 100.00 100.00 100.00
   b. Part-time 3.42 10.53 4.17 0.00 0.00 0.00 0.00

5. Highest level of education:
   a. Doctorate 8.90 7.29 12.50 5.26 18.75 0.00 0.00 0.00
   b. Masters 39.73 50.00 12.50 15.79 62.50 31.25 60.00 25.57
   c. Baccalaureate 37.67 23.95 54.17 47.37 15.63 62.50 30.00 57.14
   d. Associate 3.43 5.26 8.33 5.26 0.00 0.00 0.00 0.00
   e. High school degree 8.22 7.29 3.33 21.05 0.00 6.25 10.00 14.29
   f. other 0.66 0.00 4.17 0.00 0.00 0.00 0.00 0.00
   g. missing 1.37 0.00 0.00 5.26 3.13 0.00 0.00 0.00

6. Gender:
   a. male 52.74 36.24 54.17 34.21 40.63 50.00 80.00 71.43
   b. female 46.56 63.16 41.67 15.79 59.38 50.00 20.00 28.57
   c. missing 0.68 0.00 4.17 0.00 0.00 0.00 0.00 0.00
7. Do you directly supervise staff:
   a. Yes 67.12 63.16 53.33 73.62 75.00 68.75 60.00 71.43
   b. No 31.51 36.84 41.67 26.32 18.75 31.25 40.00 23.57
   c. missing 1.37 0.00 0.00 0.00 6.25 0.00 0.00 0.00

8. Salary range:
   a. 15,000 and below 8.90 13.16 4.17 0.00 12.50 12.50 10.00 0.00
   b. 15,001 to 25,000 54.79 65.79 45.83 26.32 59.38 56.25 70.00 57.14
   c. 25,001 to 35,000 23.03 15.79 29.17 52.63 23.13 31.25 20.00 23.57
   d. over 35,001 6.85 5.26 16.67 21.05 0.00 0.00 0.00 0.00
   e. missing 1.37 0.00 4.17 0.00 0.00 0.00 0.00 14.29

9. Do you believe that common criteria exist for evaluation of all University administrative staff?
   a. Yes 21.23 15.79 45.83 26.32 9.38 18.75 10.00 42.86
   b. No 76.03 78.93 54.17 73.63 87.50 81.25 100.00 42.86
   c. Missing 2.74 5.26 0.00 0.00 3.13 0.00 0.00 14.29

10. Do you believe common criteria should exist for evaluation of all University administrative staff?
    a. Yes 50.00 50.00 66.67 68.42 43.75 37.50 30.00 22.57
    b. No 47.98 47.37 33.33 31.58 53.13 62.50 70.00 57.14
    c. Missing 2.05 2.63 0.00 0.00 3.13 0.00 0.00 14.29

11. At what level do you think common criteria exist for evaluation?
    a. Department 29.45 15.79 29.17 15.79 40.63 37.50 50.00 42.26
    b. Vice Presidential area 9.59 5.26 20.33 10.53 9.38 6.25 10.00 0.00
    c. Administrative staff wide 12.33 10.53 12.50 26.32 9.38 6.25 0.00 23.57
    d. other 2.05 5.26 4.17 0.00 0.00 0.00 0.00 0.00
    e. No common criteria exist 42.47 57.59 29.17 47.37 37.50 37.50 40.00 22.57
    f. missing 4.11 5.26 4.17 0.00 3.13 12.50 0.00 0.00

12. At what level do you think common criteria should exist for evaluation?
    a. Department 30.82 26.32 25.00 21.05 31.25 43.75 50.00 42.26
    b. Vice Presidential area 13.01 15.79 12.50 15.79 9.38 18.75 10.00 0.00
    c. Administrative staff wide 30.82 34.21 41.67 42.11 34.38 0.00 10.00 23.57
    d. other 4.79 5.26 12.50 0.00 6.25 0.00 0.00 0.00
    e. No common criteria should exist 13.70 10.53 0.00 15.79 15.63 18.75 30.00 22.57
    f. missing 6.35 7.29 8.33 5.26 3.13 18.75 0.00 0.00

13. Were you evaluated, in writing, in the last nine months?
    a. Yes 30.57 23.95 37.50 21.05 40.63 12.50 20.00 57.14
    b. No 67.81 66.79 62.50 78.35 59.38 37.50 80.00 42.86
    c. Missing 1.37 5.26 0.00 0.00 0.00 0.00 0.00 0.00

14. Should immediate supervisors be evaluated by their staff members?
    a. Yes 71.92 76.32 66.67 47.37 34.38 75.00 70.00 71.43
    b. No 23.29 18.42 29.17 47.37 12.50 12.50 30.00 23.57
    c. Missing 4.79 5.26 4.17 5.26 3.13 12.50 0.00 0.00
### 15. Should staff member evaluations be used in the overall evaluation of supervisors?

<table>
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<tr>
<th></th>
<th>A.</th>
<th>B.</th>
<th>C.</th>
<th>D.</th>
<th>E.</th>
<th>F.</th>
<th>G.</th>
<th>H.</th>
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<tbody>
<tr>
<td>a. Yes</td>
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<td>72.26</td>
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<td>68.75</td>
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<td>13.75</td>
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<td>42.86</td>
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<td>c. Missing</td>
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<td>8.33</td>
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### 16. Should staff members be required to set annual goals and be evaluated on the attainment of these goals?

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<th>E.</th>
<th>F.</th>
<th>G.</th>
<th>H.</th>
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<td>c. Missing</td>
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<td>7.89</td>
<td>4.17</td>
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<td>6.25</td>
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### 17. If written evaluations are to be used, what format would be best?

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<th>B.</th>
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<th>D.</th>
<th>E.</th>
<th>F.</th>
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<tbody>
<tr>
<td>a. Numerical rating</td>
<td>7.53</td>
<td>10.53</td>
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<tr>
<td>b. Essay</td>
<td>10.96</td>
<td>7.89</td>
<td>25.00</td>
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<td>c. Combination of a. &amp; b.</td>
<td>74.66</td>
<td>71.05</td>
<td>70.83</td>
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<td>81.25</td>
<td>87.50</td>
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<td>100.00</td>
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<tr>
<td>d. Other</td>
<td>2.74</td>
<td>5.26</td>
<td>0.00</td>
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<tr>
<td>e. Missing</td>
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<td>5.26</td>
<td>0.00</td>
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<td>6.25</td>
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</tbody>
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### 18. How often should staff member be evaluated for the purpose of job performance?

<table>
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<tr>
<th></th>
<th>A.</th>
<th>B.</th>
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<th>D.</th>
<th>E.</th>
<th>F.</th>
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<tr>
<td>a. Quarterly</td>
<td>6.88</td>
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<td>0.00</td>
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<td>18.75</td>
<td>12.50</td>
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<td>b. Semi-Annually</td>
<td>26.71</td>
<td>26.32</td>
<td>25.00</td>
<td>15.79</td>
<td>34.38</td>
<td>37.50</td>
<td>20.00</td>
<td>14.29</td>
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<tr>
<td>c. Annually</td>
<td>52.74</td>
<td>65.79</td>
<td>50.00</td>
<td>68.42</td>
<td>37.50</td>
<td>37.50</td>
<td>60.00</td>
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<td>d. As required</td>
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<tr>
<td>e. Other</td>
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<td>0.00</td>
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<td>12.50</td>
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<tr>
<td>f. Missing</td>
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<td>0.00</td>
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<td>0.00</td>
<td>14.29</td>
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### 19. Should job descriptions be reviewed at evaluation time for the purpose of updating or defining the description for the next contractual year?

<table>
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<th>A.</th>
<th>B.</th>
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<th>E.</th>
<th>F.</th>
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<th>H.</th>
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<tbody>
<tr>
<td>a. Yes</td>
<td>28.36</td>
<td>89.47</td>
<td>33.33</td>
<td>94.74</td>
<td>94.38</td>
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<tr>
<td>b. No</td>
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<td>5.26</td>
<td>16.67</td>
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<td>15.63</td>
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<td>c. Missing</td>
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<td>0.00</td>
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### 20. Should there be an appeals procedure regarding the evaluation process different from the established grievance procedure in the administrative staff handbook?

<table>
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<tr>
<th></th>
<th>A.</th>
<th>B.</th>
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<th>E.</th>
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<tbody>
<tr>
<td>a. Yes</td>
<td>41.10</td>
<td>34.21</td>
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<td>56.25</td>
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<td>c. Missing</td>
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<td>4.17</td>
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<td>10.00</td>
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### 21. If answer to 20 above is yes, to whom should an appeal be directed?

<table>
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<tr>
<th></th>
<th>A.</th>
<th>B.</th>
<th>C.</th>
<th>D.</th>
<th>E.</th>
<th>F.</th>
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<tbody>
<tr>
<td>a. Department head</td>
<td>7.83</td>
<td>2.63</td>
<td>8.33</td>
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<td>0.00</td>
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<td>b. Vice President of area</td>
<td>16.44</td>
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<td>21.88</td>
<td>13.75</td>
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<tr>
<td>c. University President</td>
<td>0.68</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
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<td>d. Board of Trustees</td>
<td>0.00</td>
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<td>0.00</td>
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<tr>
<td>e. Administrative Staff Council Welfare Committee</td>
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<td>15.63</td>
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<td>0.00</td>
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<td>f. Other</td>
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### 22. Is there currently an evaluation conducted of your job performance?

<table>
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<th>A.</th>
<th>B.</th>
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<th>D.</th>
<th>E.</th>
<th>F.</th>
<th>G.</th>
<th>H.</th>
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<tbody>
<tr>
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<td>23.68</td>
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PART II

Percentages are reported for the following components included in your respective present evaluation process:

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<tr>
<th>Component</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
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<tr>
<td>23. Written evaluation other than on annual basis</td>
<td>7.53</td>
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<td>25.00</td>
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<td>24. Written evaluation by supervisor on annual basis</td>
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<td>59.38</td>
<td>18.75</td>
<td>40.00</td>
<td>42.86</td>
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<tr>
<td>25. Evaluation criteria made known at start of evaluation period</td>
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<td>26. Job performance expectations made known at start of evaluation period</td>
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<td>27. Face-to-face interview</td>
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<td>30. Review of duties and responsibilities</td>
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<td>31. Opportunity for response in writing to an evaluation with which you do not agree</td>
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<td>23.63</td>
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<td>18.75</td>
<td>20.00</td>
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<td>32. Evaluation becoming a part of personnel record</td>
<td>20.14</td>
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<td>54.17</td>
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<td>30.00</td>
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<td>33. Review by and input from evaluators supervisor</td>
<td>15.75</td>
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<td>29.17</td>
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<td>6.25</td>
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<tr>
<td>34. You receive copy of final evaluation</td>
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<td>53.13</td>
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<tr>
<td>35. Explanation in detail and in writing of the reasons for the evaluation</td>
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<td>25.00</td>
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### PART III

Percentages are reported for the following components which you feel should be included in the evaluation process:

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<th>C</th>
<th>D</th>
<th>E</th>
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PART IV

Criteria as the basis for evaluation are in rank order by Total Population and by each area along with the averages (1=most important to 9=least important with 10=missing value):

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**UNIVERSITY RELATIONS**

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