Personnel Welfare Committee 1993-1994

Bowling Green State University. Administrative Staff Council

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Pre-Microfilm Inventory

Collection: Bowling Green State University
Administrative Staff Council, UA-022

Location: Bowling Green, Ohio

Title of Series: Personnel Welfare Committee

Inclusive Dates: 1993-1994

Format: Bound X Loose

Order: Alpha X Chronological Numerical

Index: Included Separate X None

Notes

1. Pencil
2. Colored Ink
3. Poor Photocopies
4. Post-It Notes
5. Highlighter
Agenda Items for PWC, 1993-94

Select a representative from PWC to Insurance Committee. [Name]

Decide on future meeting times.

Reciprocal fee waivers among Ohio schools

Timetable for Market Adjustments

Workload, lost vacation days

Monitor progress in informing employees about changes in university health care system. (ASC goal #7) Are the minimum and maximum 125 contributions realistic?

Review and make recommendations on distribution of next salary pool dollars via the merit system. Factors in this process include the combination of the past three fiscal years without any merit consideration with the current fiscal year. (ASC goal #10)

Develop policies and procedures which would foster promotion of administrative staff. (ASC goal #11)

Others?

9/24/93
Agenda Items for PWC, 1993-94

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Others?

[Signatures]

9/24/93
Personnel Welfare Committee, 1993-94

Jill Carr
Denise Kisabeth
Judy Donald
Duane Whitmire
Bryan Benner
Norma Stickler, Chair
Jeanne Wright
Denise Van de Walle
MEMORANDUM

TO: Jim Morris  
Benefits Office

FROM: Greg Jordan  
Chair

RE: ASC Representative to the EAP Advisory Committee

DATE: August 10, 1993

To follow up on our telephone conversation today, please be advised that Jacquie Daley has agreed to serve as the ASC representative to the newly formed EAP Advisory Committee. Please contact Jacquie to let her know when and where the first meeting will be. Thank you.

pc: J. Daley
COUPE REISIVE EMPLOYEE ASSIS!AICE PROGRAM

PROPOSAL HIGHLIGHTS
FOR
BOWLING GREEN STATE UNIVERSITY

* Broad-brush EAP
* Integration of EAP and Managed Care
* EAP policy development
* Behavioral healthcare benefits consultation
* Supervisor training sessions (22)
* Employee EAP awareness meetings (64)
* Brochures
* Posters
* Quarterly newsletters
* Supervisor consultation
* Coverage for all full and part-time employees and families
* Bowling Green, Toledo, Fremont, Findlay, and on-site Bowling Green State University offices
* One to five sessions — assessment, short-term counseling and/or referral
* Follow-up services
* Intensive case management for BGSU health insurance subscribers
  - gatekeeping
  - pre-certification/referral
  - concurrent review
  - continuing stay review
* Program evaluation
* Critical Incident Intervention (10 hours on-site)
* Monthly Reports
* Toll-free number
* 24-hour crisis coverage
employee benefit is a confidential assessment and referral program that assists with any personal problem. Your employer contracts with Employee Assistance Source One which is a nationwide EAP organization based in Toledo, Ohio. All services are provided locally by professional counselors.

We are living in a complex, fast-paced world where we all are facing new and sometimes overwhelming problems. Fortunately, we can handle most of our problems on our own. However, there are times when problems seem unmanageable and begin to interfere with our ability to meet the day to day challenges at home and work. Some of these problems might be divorce, step-parenting, single parenting, loss and grief, work pressures, marital concerns, parenting challenges, chemical dependency, and financial difficulties.

As an employee, you are eligible to use the EAP benefit. Anyone close to you including a spouse, child, or parent may also take advantage of this benefit.

The visits with the EAP counselor are provided at no charge to you. Should you accept any referral recommendations made by the EAP counselor, there could be a cost at that time. Most referrals, such as short-term family counseling, are covered to some extent by your medical insurance.

Hopefully, EAP helps you perform better at work by resolving problems that might interfere with your work performance.

Only those people you choose to tell. This is one of the reasons the EAP is so successful. Any information you share with your EAP counselor is completely confidential.

Simply call EAP as outlined on the card below. Identify your place of employment and ask for an EAP counselor. In most cases, an appointment will be scheduled within two working days or sooner in a crisis situation. Day and evening appointments are available.
EA-SO BGSU EAP MODEL

BGSU EMPLOYEES

EA-SO EAP PROFESSIONAL ASSESSMENT, COUNSELING, and/or REFERRAL
Toledo, Bowling Green, BGSU, Fremont, & Findlay

PROBLEM(S) RESOLVED within 1 to 5 SESSIONS

REFERRAL, "GATEKEEPING", & TRIAGE

COMMUNITY RESOURCES

PREFERRED PROVIDER OUTPATIENT TREATMENT

ACUTE INPATIENT CARE
EM PLOYE E ASSISTANCE PROGRAM

The Ability Center
Aeroquip Inoac Co.
B.P. Oil Refinery
B.P. Oil - Service
Blue Cross & Blue Shield of Ohio
Cable System
City of Maumee - Police Division
City of Oregon
City of Toledo - Police Division
Church and Dwight
Commercial Pump Service, Inc.
Consumers Power
Doehler-Jarvis
Excel Wire & Cable Co.
Findley, Davies & Co.
Fostoria City Schools
HHWP Community Action Commission
Industrial Printing Company
James River Corporation
Mental Health Insurance Trust

BOOST
COMPASS
Connecting Point
Court Diagnostic & Treatment Center
Cummings-Zucker
East Center
Ide Center

WFO Research, Inc.
Northwestern Mutual Life Insurance Co.
Ohio Power
Owens-Corning Federal Credit Union
Ronfeldt Associates, Inc.
Seaway Food Town, Inc.
Society Bank - Indiana/Michigan/Ohio
Standard Products
Stone Container Corporation
Tiffin Enterprises
Toledo Chapter of Credit Unions
Toledo Electrical Welfare Fund
Toledo Zoological Society
Treu House of Hunch, Inc.
Whirlpool - Clyde Div.
WTOL-TV

CURRENT EAP CLIENT LIST

Lucas County Mental Health Board
Northwest Ohio Hospice Association
Rescue Crisis
St. Paul's Community Center
Substance Abuse Services, Inc.
West Center
Zepf Center

EMPLOYEE ALTERNATIVES

One Sunforest Court, Toledo, Ohio 43623 • (419) 475-5338 or (800) 422-5338
MEMORANDUM

TO: Greg Jordan  
   Chair, Administrative Staff Council

FROM: Walt Montenegro  
   Personnel Services

SUBJECT: Administrative Staff Market Adjustment Procedures

Administrative Council has developed the attached procedures for handling requests for market adjustment from administrative staff members. Please review the procedures and provide any comment deemed necessary or constructive. It is envisioned that the final edition of the procedure will be disseminated to all administrative staff immediately and subsequently placed in the administrative staff handbook.

Please contact me if there are any questions regarding this.

WGM 1jg

Attachment

xc: John C. Moore

9-23

NORMA: per our conversation, could you review the attached and forward comments back to exec? Thanks.
PROPOSED ADMINISTRATIVE STAFF MARKET ADJUSTMENT PROCEDURES

1. Market adjustment activities for administrative staff may be conducted annually in accordance with the following timetable:
   a. Request for market adjustment surveys will be accepted annually through December 31.
   b. Survey data will be collected and disseminated to employees and their respective vice presidents during the months of January and February of the following year.
   c. During the spring, Administrative Council will review requests for market adjustments, including determination of whether funds are available. Administrative staff market adjustments which are approved will be effective on July 1.

2. Requests for market adjustment surveys after December 31 will be included in the next round of activities. An administrative staff member requesting a market adjustment survey on January 1 or later will be included with the group whose end date is the following December 31.

Approved by PWC, 10/1/93
Dear Jim:

When I turned in my Health Care Enrollment form, I was told I needed to submit a copy of my wife's divorce decree. Further, I was told that claims may not be processed for my dependant stepchildren until I do submit a copy of the decree. Please confirm that this will not be a problem.

I completed the form showing my marital status as married, which I am. I have never been divorced or legally separated. Further, all of my listed dependents reside with me, are claimed as deductions on my wife's & I's tax return, and we have financial responsibility for them. Finally, medical coverage is one of my employee benefits, not my wife's. I do not see how my wife's past marital status, or its outcome, is any of the University's business!

It seems to me that the divorce decree copy is necessary for parents who are trying to enroll non-co-habitant children who are not financial dependents. This is clearly different than my case where I wish to enroll my co-habitant, IRS approved dependents.

I would hate to think that employees who marry people with children, and take these children on as dependents (both financially and residually) are discriminated against by the University. Further, I will be shocked if complete and truthful completion of an enrollment form is not adequate to provide health care coverage.

Sincerely,

Lewis Johnson

xc: Norma Stickler, Chair
   Administrative Staff Council Employee Welfare
# B.G.S.U. Health Care Enrollment Form

**NAME:** Johnson Lewis  
**LAST NAME:** Lewis  
**FIRST NAME:** Johnson  
**MIDDLE NAME:** Lewis  
**SOCIAL SECURITY #** 26150097  
**DSN/ID #**  
**DATE OF BIRTH** 1/6/60  
**ADDRESS** 1895 S. Kellogg Rd.  
**CITY**  
**STATE/ZIP CODE**  
**CLASSIFICATION**  
**MARITAL STATUS** Single  
**TYPE OF COVERAGE ELECTED** Individual (Employee Only)  
**PLAN SELECTED**  

### LISTING OF ELIGIBLE DEPENDENTS

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>MI</th>
<th>LAST NAME</th>
<th>SOCIAL SECURITY NO.</th>
<th>DATE OF BIRTH</th>
<th>SEX</th>
<th>RELATIONSHIP</th>
<th>ENROLLED IN MEDICAL</th>
<th>ENROLLED IN DENTAL</th>
<th>ENROLLED IN VISION</th>
<th>ENROLLED IN DRUG</th>
<th>ENROLLED IN FLEX</th>
<th>EMPLOYER NAME</th>
<th>ADDRESS OF COMPANY/ADMINISTRATOR</th>
<th>TYPE OF COVERAGE CARRIED BY SPOUSE</th>
<th>TYPE OF COVERAGE CARRIED BY CHILD</th>
<th>TYPE OF COVERAGE CARRIED BY FAMILY</th>
<th>TYPE OF COVERAGE CARRIED BY EMPLOYEE</th>
<th>TYPE OF COVERAGE CARRIED BY DEPENDENT</th>
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<td></td>
<td>268804864</td>
<td>12/26/60</td>
<td>F</td>
<td>Spouse</td>
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<tr>
<td>Lewis</td>
<td></td>
<td></td>
<td>299438826</td>
<td>3/25/62</td>
<td>M</td>
<td>Child</td>
<td>Y</td>
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</table>

**DO YOU OR ANY OF YOUR DEPENDENTS HAVE OTHER HEALTH INSURANCE?** Yes  
**IF YES, COMPLETE BELOW**

**NAME OF INSURANCE COMPANY PLAN/ADMINISTRATOR**  
**ADDRESS OF COMPANY/ADMINISTRATOR**

**NAME OF POLICYHOLDER**

**NAME OF INSURANCE COMPANY PLAN/ADMINISTRATOR**

**ADDRESS OF COMPANY/ADMINISTRATOR**

### CERTIFICATION

I certify that the above completed information is true and correct to the best of my knowledge.

Employee Signature: [Signature]  
Date: 1/1/94

**NOTE:** If enrollment form has been completed to indicate a change in status and/or coverage for yourself or dependents, please indicate type and date of change below:

- Name change (former name)
- Marital status (change)
- Add dependents to coverage (date)
- Divorce (date)
- Remove dependents from coverage (date)
- Widowed (date)
- Change in other coverage for dependents (date)
October 22, 1993

MEMORANDUM

TO: Personnel Welfare Committee
   Bryan Benner
   Jill Carr
   Judy Donald
   Denise Kisabeth
   Denise Van de Walle
   Duane Whitmire
   Jeanne Wright

FROM: Norma J. Stickler
       Director of Academic Services

SUBJECT: November 5 meeting

Just a reminder that our next meeting is Friday November 5 at 8:30 a.m. in the Chart Room. I have invited John Moore and Marshall Rose to attend the meeting in order that we can have some discussion with them about the topic of promotion and advancement opportunities for administrative staff. Among the ideas that Jill Carr, Denise Kisabeth, and I have discussed are changing the format of job descriptions to be less specific about requirements, such as requirements for a degree in a particular field, for a specific number of years of experience, etc. Could we automatically include in those to be interviewed any internal candidate who surfaced in the top ten percent after review by the search committee? How can we work with supervisors to help administrative staff members develop a career path and determine if there will be opportunities for advancement in the staff member’s current area or in another area of campus? How can we begin to look for skills rather than specific experience? How can we make career advancement possible without restricting the prerogatives of managers to hire the best person, and without jeopardizing our commitment to affirmative action principles?

To the extent that time permits, I would also like to hear an update from other subcommittees.

Thanks. Please give me a call if you can’t make it.

xc: John Moore
    Marshall Rose
November 12, 1993

MEMORANDUM

TO: Personnel Welfare Committee

FROM: Norma J. Stickler
Director of Academic Services

SUBJECT: Next meeting

The next meeting of the PWC will be Friday, November 19 at 8:30 in the McFall Center Chart Room. I would like to have some further discussion about the ideas presented by John Moore and Marshall Rose and have a report from the merit subcommittee.

Enclosed is information John Moore sent to me about the Federal regulations on insurance coverage.

Please let me know if you are unable to attend.

closure
ERISA PROVISIONS

The Act amends ERISA by adding new section 609, Additional Standards For Group Health Plans, which requires:

1. Qualified Medical Child Support Orders—requires group health plans to honor or administer benefits in accordance with any “qualified medical child support order.” Such an order creates or recognizes the existence of an “alternative recipient’s” right to health coverage under a group health plan and must be in the form of a judgment, decree or order (including approval of a settlement agreement) issued by a court of competent jurisdiction.

“Alternative recipient” is defined as any child of a participant who is recognized under a medical child support order as having a right to enrollment under a group health plan with respect to such participant.

To be “qualified,” a medical child support order must clearly specify the following information:

a. the name and last known mailing address of the participant;

b. the name and last known mailing address of the child covered by the order;

c. a reasonable description of the type of coverage to be provided by the plan to the child, or the manner in which such type of coverage is to be determined;

d. the period to which such order applies; and

e. each plan to which such order applies.

Such an order cannot require a plan to provide any type or form of benefit or any option, not otherwise provided under the plan.

The plan administrator must: (a) promptly notify the participant and each child specified in the order that it has received a medical child support order; (b) within a reasonable period of time determine if such order is "qualified"; and (c) notify the participant and each specified child of such determination.

The plan must establish reasonable procedures for determining the qualified status of medical child support orders. Such procedures must be in writing, provide for notification of each participant and specified child upon receipt of such order, and must permit a child to designate a representative for receipt of copies of notices which are sent to the child with respect to such order.

An alternative recipient is considered a participant for purposes of ERISA’s reporting and disclosure provisions and a beneficiary under all other provisions of the Act.

This will be Awaited by The Dept of Labor.
November 15, 1993

TO:  James Morris, Benefits Manager
      Personnel Services

FROM:  Mary E. Zachary, Head of Access Services
        Jerome Library, and
        C. Martin Rosen, Head of Bibliographic Services
        Jerome Library

During the meeting in your office on November 12, 1993, you met with Marty Rosen and me. Our discussion focused on two aspects of the recent decision to require divorced and legally separated individuals to furnish copies of divorce decrees or legal separation agreements along with the BGSU Health Care Enrollment Form: 1. ERISA requirements, and 2. Protecting the integrity of the Health Care Plan.

You stated that the recent amendment to the ERISA statute motivated the Health Plan Administrator to advise that BGSU require submission of divorce decrees and legal separation agreements. We disagree with this interpretation of the statute. Our reading indicates that the amendment simply recognizes that the employer is explicitly obligated to provide benefits in accordance with the applicable requirements of any qualified medical child support order and protects dependents from arbitrary denial of benefits.

In addition, you stated that copies of divorce decrees and legal separation agreements were important tools in ensuring the integrity of the health care plan, because they protect the larger constituent group. It was (and is) our contention that singling out two classes of employees for heightened scrutiny based solely on marital status is discriminatory in nature. We disagreed with the assumption this heightened scrutiny implies: that divorced or legally separated individuals are more likely to commit fraud or lie about claims or eligibility.

We also made you aware that we have grave concerns about the blanket approach taken by the Plan Administrator in collecting private information from individuals in the absence of any specific evidence of wrongdoing. We objected especially strongly to the intimidating language on the form itself to the effect that copies of divorce decrees or legal separation agreements "must be provided before claims for dependents will be considered."

Moreover, we made you aware of our understanding that regardless of the existence of any court mandate, all eligible employees have the right to enroll in the Health Care Plan, include any and all eligible dependents in the Health Care Plan, and receive appropriate benefits for all covered individuals in accord with the Health Care Plan.
It is our understanding that the three of us agreed upon the following:

1. That the BGSU Benefits Office and Core Source will continue to process all claims made by individuals for dependents regardless of whether copies of divorce decrees have been submitted along with BGSU Health Care Enrollment Forms.

2. That the BGSU Benefits Office will "revisit" the requirement that divorced or legally separated individuals taking advantage of the family health care coverage benefits must submit copies of divorce decrees or legal separation agreements in order to have claims considered.

3. That you will inform the constituents of BGSU's Health Care Plan of the outcome of this "revisitation" in an expeditious manner.

/MBZ
/x: N. Stickler, Chair
ASC Personnel Welfare Committee
TO: Members of the Insurance Committee, Faculty Senate Welfare Committee, Norma Stickler, Chair, Personnel Welfare Committee and Randy King, Personnel Welfare, Classified Staff Council

FROM: Don Boren, Chair
Health Care Task Force

RE: Health Care Goal Setting

DATE: November 23, 1993

Perhaps the only certainty in employee health plans is that the plans will change; and if cost continue to escalate at twice the rate of inflation, the change will be painful. I believe that the best plans, in both quality and cost, will be provided by employers who establish long range goals and are structured to accomplish these goals. In an institution, such as the University, this requires a broad consensus as to the goals and plans for achieving them.

The Task Force hopes to take the first step in university-wide goal setting by engaging in a very intense awareness building session. This session will be held from 9:00-3:30 on December 15th & 16th in the College Park classroom.

Mr. Bill Hembree, the Director of the Health Research Institute, will be helping us in this endeavor. As you can see from the attached biographical profile, Mr. Hembree, is a recognized authority in this area.

Since this subject is of such importance to all of us, we are inviting all members of the Insurance Committee, the Faculty Senate Welfare Committee, and representatives of the Administrative Staff and Classified Staff Councils to participate.

In order to assure proper seating, please RSVP to the Department of Legal Studies by December 10, 1993. Please contact me if you know of other individuals or groups that you believe should be invited.

DB:pw

Encl:

xc: Paul Olscamp, President
Chris Dalton, Vice-President
Planning & Budgeting
Bob Martin, Vice-President
Operations
Ben Muego, Chair
Faculty Senate
Greg Jordan, Chair
Administrative Staff Council
Bob Krelenkamp, Chair
Classified Staff Council
BIOGRAPHY

William E. Hembree

William E. Hembree is the Director of Health Research Institute in Walnut Creek, California. He has held this position since founding HRI in 1978.

HRI is a non-profit, independent and objective, research-based organization providing health care cost containment and health improvement policy planning and implementation assistance, research, health education, data collection and analysis, and communications services to major private and public employers, unions, and coalitions.

Mr. Hembree received his BA and MBA from California State University at Long Beach. Since his graduation, he has held management positions with a major group insurance company, the nation's oldest Health Maintenance Organization, and Hewitt Associates, a compensation and benefits consulting firm.

As Director of HRI, Mr. Hembree is responsible for overall direction, development, and management of Health Research Institute's activities. He was instrumental in developing the nation's only 1,500 largest U.S. employers biennial survey of health care cost containment actions. Also, under his guidance HRI has developed an analytic process used to help focus employers' scarce resources on their specific cost and utilization problems, health education newsletters, and employers' NEWS service, various workshops on cost containment, and a cost-benefit approach to health promotion, prevention, and wellness.

His work includes assessments of alternative delivery systems, evaluation of results of specific cost containment/health improvement actions, innovations in the use of health care anti-economics to control costs, and the development of coalitions and other joint employer- and community-based efforts to halt spiraling medical care costs.

During Mr. Hembree's nearly 25 years of experience in the health and employee benefits field, he has advised major employers and coalitions across the U.S., served as a director for public service and private industry organizations, and has conducted legislative review and extensive research into the most cost-effective ways to contain costs and improve employee health.

In recognition of his accomplishments, Business Insurance magazine named Mr. Hembree as one of twenty individuals who have had the most significant influence on employee benefits in the U.S. over the past twenty years (1968-1988).

Mr. Hembree is an active writer and frequent speaker on innovative and cost-effective health care cost containment and health improvement techniques. His most recent book is entitled Breakthroughs in Health Care Management: Employer and Union Initiatives.
November 30, 1993

MEMORANDUM

TO: Norma Stickler
   Academic Affairs

FROM: Suzanne Crawford, Dean

Norma, I like these ideas a lot — especially an ongoing "certificate bearing" institute which may go over a couple of years and include upper level and state-wide decision making discussions about higher education (i.e., the president of Bowling Green and the president of the University of Toledo or Akron to give a municipal university view and a member of the Board of Regents, the education legislative person in the Governor's office). Also sessions on finances and budgeting. If we divide this institute and do it as a course, we can think about running it under a 500 number and add papers or project for credit option or we can retain the institute as certificate.

As you can plainly see, I think this is an exciting option and in my opinion should precede an exchange of jobs, so that one can maximize the "on job experience." Please count me in to assist in the design and operation.
MEMORANDUM

TO: Personnel Welfare Committee

FROM: Norma J. Stickler

SUBJECT: Meeting

March 9, 1994

I would like to call a meeting of PWC for Friday, March 18, 8:30 in the McFall Center Caucus Room. We need to talk about last week's ASC meeting discussion. In addition please review the attached statement regarding the Family Leave Policy to be included in our Handbook. The statement is very basic, referring to the new law which took effect last August. I see no problems with it, but John Moore has asked for our review.

A third item will be discussion of stipends for acting and interim appointments. Should there be some uniform agreement on how much the stipends are? In some instances, there is not an interim appointment, and the work is distributed to several people. Should these people be compensated?

attachments
MEMORANDUM

TO: Annmarie Heldt
   Assistant Vice President of Personnel
   The University of Toledo

   Ted Heidloff
   Executive Director Human Resources
   Eastern Michigan University

FROM: John C. Moore
   Executive Director
   Personnel Services

DATE: March 23, 1994

RE: Leadership Development Program

We have a date for our first meeting, April 22nd at the University of Toledo from 10:00 a.m. to 2:00 p.m.

In 1989 there was a kickoff for a program called Midwest 2000: Project Leadership. This was a professional development program undertaken by six Midwest Universities for the purpose of identifying and assisting in the development of future leaders. The institutions were: Illinois State University, Central Michigan University, University of Cincinnati, Western Michigan University, University of Illinois-Chicago and Bowling Green State University.

Their commitment at the time was the development of strong leaders in higher education. They shared certain commonalities, but yet each was distinctive in nature. The combination provide a very valuable learning laboratory.

I am hoping we can put life back into this program. On April 22nd, Suzanne Crawford, Dean of Continuing Education will give an overview of the Midwest 2000 Project Leadership, followed by Marshall Rose, Director of Affirmative Action, who will talk about Central Michigan University Women's Institute for Professional Development Program. We can then brainstorm on what our "Leadership Development Program" should be. Attached is a copy of the Midwest 2000 Project topics.

The potential of what we can do as a team for our employees is unbelievable.

I hope you have made contact with your training director, continuing education department head and your affirmative action manager.

Annmarie will contact us on the location of the meeting at the University of Toledo.

JCM:mmb
xc: Bob Martin
    Greg Jordan
    Marshall Rose
    Suzanne Crawford
GUIDELINES

1. Problem oriented
2. Involves leadership capabilities
3. Provides synthesis of content
4. Has institutional impact
5. Helps self assessment
6. Values theory and practice

FORMATS

- Strategic plan
- Grant application
- Article for periodical
- Analysis of campus/state influences
- A workshop/seminar
- Marketing plan

- Action plan
- Awards nomination
- Fund raising project
- Radio/TV program
- Program/services plan

- Evaluation plan
- Staff development plan
- Student retention plan
- Videotape

TOPICS/CONTENT

- Developing sensitivity to multic-cultural groups
- Planning a future Midwest 2000 program
- Financial aid for part-time/non-traditional students
- Preparing for budget cutbacks
- Minority recruitment/retention
- Tailoring student services to adult learner needs
- Faculty development/sensitivity to adult learning
- Developing a multiyear marketing approach
- Continuing education mentoring program
A marketing plan to attract multicultural /diverse groups
Creating an external relations group
Develop a marketing tracking system
Interpret Midwest 2000 to other CE staff
Integrating C.E. to the rest of the University[goals and mission]
Research and development program for women
Leadership skill development plan related to the economy and impact on CE and universities [retraining].
Getting all staff involved in the 'mission'.
Training staff to work with adult learners.
Orientation program for new employees.
Internal marketing strategies
Serving dyslectic students
Dealing with 'turf' issues in the university.
Minority students in teacher education.
Developing a model for business clients to use university facilities.
Developing an institutional identity for adult learners
Getting involved with economic development
Positive tracking of adult students
Retention of adult learners to graduation
Integration of marketing within the entire university.
MEMORANDUM

TO: Greg Jordan, Chair
    Administrative Staff Council

FROM: Norma J. Stickley
       Chair, ASC Personnel Welfare Committee

March 28, 1994

At recent meetings PWC has discussed several issues, and our recommendations are noted below.

Family and Medical Leave Act
The Family and Medical Leave Act took effect in August, 1993. The attached summary statement will be included in the Administrative Staff Handbook, and staff members wishing to use the provisions of the Act will be given a full set of guidelines by the Personnel Services Office. These guidelines are currently being written and will comply with the Act. PWC should review these guidelines when they are ready.

Staff Awards
A question has been posed about whether part-time staff members should be eligible for staff awards based on their service being prorated or whether their years of service should be inclusive from the date of hire. It is PWC's recommendation that part-time staff service be recognized based on inclusive dates, e.g., a staff member hired in 1974 who is still working here should be recognized for 20 years of service to BGSU. We further recommend that this change be retroactive so that records of all administrative staff be checked now and adjustments made for part-time service.
KEY REGULATIONS

Administrative staff members are issued office and building keys as needed for their assignments. Keys are issued by the key office, Physical Plant, 48 hours after submission of a key authorization card signed by the employee's supervisor. Grand master keys and alarm keys are issued by the Director of Public Safety. When a staff member leaves the University or transfers to a different location on campus, keys must be returned, either at the exit interview in the case of resignation or at the key office in the case of transfer. Master keys are returned to Public Safety. All keys remain the property of the State of Ohio and may not be duplicated. Employees will be assessed appropriate fees for lost keys as determined by the Physical Plant.

LEAVES

FAMILY AND MEDICAL LEAVE ACT (FMLA) POLICY

BOWLING GREEN STATE UNIVERSITY UNDERSTANDS THE IMPORTANCE OF FAMILY ISSUES IN TODAY'S WORK FORCE. THE UNIVERSITY ALSO RECOGNIZES THAT MORE OF ITS EMPLOYEES THAN EVER FACE CONFLICTING DEMANDS OF FAMILY OBLIGATIONS AND WORK. BECAUSE EMPLOYEES MAY FIND IT NECESSARY TO TAKE LEAVE FROM THEIR JOBS FOR A TEMPORARY PERIOD TO ADDRESS CERTAIN FAMILY RESPONSIBILITIES OR THEIR OWN SERIOUS HEALTH CONDITIONS, AND IN ORDER TO COMPLY WITH THE FAMILY AND MEDICAL LEAVE ACT (FMLA) OF 1993, THE UNIVERSITY HAS ESTABLISHED A PARENTAL LEAVE AND FAMILY AND MEDICAL LEAVE POLICY. THE UNIVERSITY WILL GRANT AN ELIGIBLE EMPLOYEE UNPAID LEAVE FOR UP TO 12 WEEKS DURING A 12-MONTH PERIOD FOR THE FOLLOWING REASONS:

1. THE BIRTH OR ADOPTION OF A CHILD, OR THE FOSTER CARE PLACEMENT OF A CHILD.
2. TO CARE FOR A 'FAMILY MEMBER' OF THE EMPLOYEE IF THAT INDIVIDUAL HAS A SERIOUS HEALTH CONDITION.
3. A SERIOUS HEALTH CONDITION OF THE EMPLOYEE RENDERS THE INDIVIDUAL UNABLE TO PERFORM HIS OR HER JOB FUNCTIONS.

A PACKET OF INFORMATION COVERING THE UNIVERSITY'S POLICY, REQUEST FORMS, AND REQUIRED DOCUMENTATION IS AVAILABLE IN THE OFFICE OF PERSONAL SERVICES. A COPY OF EMPLOYEE RIGHTS UNDER THE FAMILY AND MEDICAL LEAVE ACT OF 1993 IS CONTAINED AT THE END OF THIS HANDBOOK.

QUESTIONS OR CONCERNS REGARDING FAMILY OR MEDICAL LEAVE UNDER THIS ACT CAN BE ADDRESSED BY CALLING PERSONNEL SERVICES (372-8421).

LEAVE OF ABSENCE

A leave of absence without pay may be granted to a full-time administrative staff member by the area supervisor. The supervisor should consider the following factors before granting a leave of absence:

1. receipt of written leave request at least one month prior to the effective date of the leave;
2. length of leave of absence requested; and
March 28, 1994

MEMORANDUM

TO: Greg Jordan, Chair
    Administrative Staff Council

FROM: Norma J. Sticklen
       Chair, ASC Personnel Welfare Committee

At recent meetings PWC has discussed several issues, and our recommendations are noted below.

Family and Medical Leave Act
The Family and Medical Leave Act took effect in August, 1993. The attached summary statement will be included in the Administrative Staff Handbook, and staff members wishing to use the provisions of the Act will be given a full set of guidelines by the Personnel Services Office. These guidelines are currently being written and will comply with the Act. PWC should review these guidelines when they are ready.

Staff Awards
A question has been posed about whether part-time staff members should be eligible for staff awards based on their service being prorated or whether their years of service should be inclusive from the date of hire. It is PWC's recommendation that part-time staff service be recognized based on inclusive dates, e.g., a staff member hired in 1974 who is still working here should be recognized for 20 years of service to BGSU. We further recommend that this change be retroactive so that records of all administrative staff be checked now and adjustments made for part-time service.
The Personnel Welfare Committee has met regarding the motions that were tabled at the last full ASC meeting. Based on the discussion at the ASC meeting and the results of the survey conducted earlier by the PWC, we recommend the following.

1. In cooperation with Personnel Services, establish as soon as possible the committee composed of representatives from all vice presidential and president's area to 1) develop a plan to assure there is an annual evaluation of all administrative staff and an annual assessment of goals and expectations, 2) develop a common definition of merit to be used across all areas, 3) develop a component of evaluation forms that would be common across all vice presidential areas, and 4) make further recommendations on evaluation forms.

2. In the meantime, keep the distribution split between across-the-board and merit at 60/40 and use evaluation procedures and policies in place in each of the vice presidential areas. PWC does recommend, however, that the vice presidents be consistent in determining how many years of performance will be evaluated for merit.

3. Consistent with the Salary Committee's standing recommendation, merit should be considered only if the total percentage increase is higher than the cost of living.

Just as there seemed to be no consensus following the discussion at the last ASC meeting, the survey of half of the total administrative staff members revealed that there is no strong consensus for a change in the across-the-board/merit split and there is no strong agreement on whether merit should be awarded based on the last year or the last three years. There was a slight majority favoring the changes recommended in the motions presented at the March meeting; however, because there is at the same time agreement that evaluation procedures are too often unfair, inconsistent, uneven, and sporadic, it seems best to await a further study of merit and evaluation policies and procedures.

xc: PWC
MEMORANDUM

TO: Greg Jordan, Chair
Administrative Staff Council

FROM: Personnel Welfare Committee

SUBJECT: Stipends

The Personnel Welfare Committee has discussed a question referred to us concerning stipends and compensation for acting and interim appointments. We recommend that when a staff member is asked to assume a full-time interim or acting position, he or she be given a stipend equal to at least ten percent of his or her current salary. If this appointment results in the distribution of the interim person's previous work to another individual, that person should also receive a ten percent stipend. If the work is distributed to more than one person, an attempt should also be made to compensate those individuals on a pro-rata basis, using ten percent as the base. For example, a person handling one-half of the work should receive a five percent stipend. If there is no full-time interim appointment and the work is distributed, those receiving extra duties should be compensated in like fashion. It is recognized, however, that a point is reached at which it will be difficult to measure the amount of work that is distributed and when it will not be possible to make a fair determination of extra compensation.
May 6, 1994

MEMORANDUM

TO: PWC

FROM: Norma J. Stickler
       Chair, Personnel Welfare Committee

SUBJECT: Meeting

I know, just when you thought we were done for the year.

A couple of issues have been brought to my attention that I would like to have some discussion on, and if we are not able to resolve them in one meeting, perhaps we could at least get started and hold them over for next year's PWC.

In addition, I think we need to make a statement again about the problems that were to have been handled this year by the Mercer study. The issues still exist, and I think PWC should go on record as affirming with Personnel Services the need to do a salary equity/job description/job responsibility study. I have drafted a memo to John Moore and enclose it for your comments at the meeting.

1. Market adjustments (see attached draft)
2. Salary/job responsibility study (see attached draft)
3. Sick Leave: Should administrative staff pursue establishment of a sick leave "bank" into which each of us might contribute some of our accumulated sick leave time that would be held for use, upon application and review, by staff members who experience catastrophic illness and use up their own accumulation.

Reminder of our meeting: May 25, 1:00 p.m., McFall Center Caucus Room
MEMORANDUM

TO: John Moore
   Executive Director of Personnel Services

FROM: Personnel Welfare Committee
       Administrative Staff Council

SUBJECT: Salary Equity and Market Adjustments

The Administrative Staff Personnel Welfare Committee wishes to report to you formally our concerns relating to a few issues of importance to our constituents. We recognize that you are aware of these concerns, but we believe it is important to reaffirm our commitment to working with your office in seeking solutions to problems that are affecting the morale of the staff.

Salary Equity/Job Responsibility

In the summer and fall of 1993, there was some indication that an external consultant would be hired to conduct a survey of each administrative staff position and the attendant responsibilities. The determination was finally made by central administration that the method to be used was not appropriate to our situation. The need still exists, however, to conduct a thorough study of administrative staff job responsibilities and salaries. There is real concern that inequities exist among the various vice presidential areas of the campus, between the sexes, and between current employees and new hires. Problems still exist in ascertaining the appropriate salary for new hires. There remains a distrust of the market adjustment process because of the lack of good peer evaluation data.

The Personnel Welfare Committee requests that in 1994-95, the highest priority be given to using an external consultant to conduct a study of all administrative staff positions to address the above problems.

Market adjustments.

Although a timetable for the market adjustment review process was established earlier this year, there are several more basic issues that keep arising.

New hires are paid a competitive salary, while current employees may be losing ground to the market.
Currently, market adjustment requests seem to be initiated almost exclusively by the employee. Requests should be initiated also by the supervisor or hiring official, particularly in instances such as that described above where there is salary compression with the current market.

Merit money should not be used for market adjustments, as now frequently occurs.

Staff members find it difficult to track what is happening with their market adjustment requests. They submit a request and do not hear confirmation about where it is in the process. PWC proposes the following phases of feedback to the employee:

1. Written confirmation of receipt of the request in the Personnel Office and a brief meeting set up with the staff member to discuss a potential peer group and to review the request (within approximately two weeks of receipt). There is considerable uneasiness about the manner in which peer groups are selected for market adjustment review. Some areas on campus that employ technical staff might need to include comparisons with regional industry or business. A discussion with the employee about a logical peer group may alleviate some of these concerns.

2. Status report on the request (within 2 to 3 months of receipt)

3. Notification of resolution of the request (by July 1 of the decision year)

xc: Administrative Staff Council membership
MEMORANDUM

TO: Greg Jordan, Chair, ASC
    Pat Green, Chair Elect, ASC

FROM: Norma J. Stickley
      Chair, Personnel Welfare Committee

SUBJECT: Sick leave accumulation

      At our last meeting of the year, the ASC Personnel Welfare Committee
      had preliminary discussion of the idea of developing a sick leave “bank” into
      which sick leave time would be contributed by staff members for use by other
      staff in the event of catastrophic illness. We anticipate that although use of such
      a pool would seldom occur, it could literally be a life-saving benefit for
      employees who have major illness. I am forwarding to you a list of some of the
      ideas and suggestions raised so that the 1994-95 PWC might continue
      investigation of such a policy.

      Potential features:
      Days or hours contributed automatically from each staff member’s
      unused balances each year—perhaps one day per year.
      Alternatively, automatic contributions of a specified percent of
      unused sick leave forfeited by retirees.

      The option for voluntary contributions to a specific person.

      Eligible to draw from the bank only for catastrophic illness and
      only if the employee has a history of non-catastrophic use of his or
      her own sick leave of less than a certain percent.

      Eligible to draw from the bank upon application, with applications
      reviewed by a peer group.

      An established limit that could be used from the pool.
Among the questions to be considered:

**Definition of catastrophic illness.**

Whose budget would be charged for the sick leave pay?

Can we legally limit the use of such sick leave to the employee him/herself, or must it be extended to members of the family as defined, e.g., in the Family and Medical Leave Act?

Cross-over with the classified staff and faculty? One pool?

How to coordinate with long-term disability.

Coordination with the policy being established by the classified staff.

xc: PWC  
Bev Stearns  
Barb Keeley
MEMORANDUM

TO: Personnel Welfare Committee
    Bryan Benner
    Jill Carr
    Judy Donald
    Denise Kisabeth
    Denise Van de Walle
    Duane Whitmire
    Jeanne Wright

FROM: Norma J. Stickler
       Chair of ASC Personnel Welfare Committee

SUBJECT: Thanks

I'm enclosing a report of our activities during the year. Although we start another year without a thorough salary/position study, I think the need for such a study is so evident that progress will be made. We can all be proud of the advancements made in cooperation with John Moore and Marshall Rose on holding an institute for staff and on increasing the opportunities for staff advancement and development. An update on that issue: John, Marshall, and Sue Crawford have been meeting with representatives from the University of Toledo and Eastern Michigan University and are finalizing plans for an institute open to 10 staff members from each school, to be held in the spring of 1995.

It was through the initiative of PWC that the need was affirmed for a study of the merit and performance evaluation system, which has resulted in the formation of a committee composed of representatives from each of the vice president's areas. You have been a great committee to work with, and I extend my own thanks and that of the entire ASC for your fine work.

An integral part of any success we have had has been the cooperation and leadership by John Moore, and I certainly extend to him our gratitude for his assistance and guidance.

cc: John Moore
    Pat Green
    Greg Jordan
    Beverly Stearns
    Barbara Keeley
Conducted a survey that included approximately half of the administrative staff to determine opinions on how much time should be covered by the next merit increases. As a consequence recommended the formation of a committee composed of vice presidential appointees to review merit guidelines and performance evaluations.

In consultation with Marshall Rose and John Moore developed guidelines to improve promotion and advancement opportunities for administrative staff. Included are changes to job descriptions to be less restrictive, increased opportunity for internal candidates to be interviewed for positions, use of acting appointments to enhance administrative experience, creation of a Higher Education Administrative Institute, educational programs for supervisors to improve evaluation skills.

Participant in preliminary presentations from four managed health care providers.

Followed up on problems with requests of divorced staff with children for ERISA documentation for health care coverage.

Developed a proposal for acting and interim salary stipends

Approved a market adjustment timetable

Worked with the Personnel Services Office in developing plan for Mercer Study, which was subsequently shelved.

Investigated possibilities for reciprocal fee waivers with other schools. Determination that too political an issue across the state now because non-university state employees would like to have fee waiver privileges.

Reviewed Family Medical Leave Act statement for inclusion in Administrative Staff Handbook.

Approved inclusion of part-time staff in staff awards based on inclusive years of service instead of pro-rated years.

Conducted preliminary discussions for a procedure to create a sick-leave bank for use by staff members with catastrophic illness.

Developed a memorandum to Executive Director of Personnel reaffirming the need for an external review of staff salaries and job descriptions and proposing a timetable for Personnel Services to review of market adjustment requests and keep staff members informed of the progress of their requests for adjustments.
MEMORANDUM

TO: Personnel Welfare Committee
   Administrative Staff Council

FROM: John C. Moore
       Executive Director
       Personnel Services

SUBJECT: Salary Equity and Market Adjustments

Reference is made to your memorandum of May 25, 1994, regarding salary equity and market adjustments. The following comments are made regarding the two principal areas of concern:

Salary Equity/Job Responsibility
I concur that a thorough study needs to be conducted on administrative staff positions and that a more structured salary plan needs to be in place. I would suggest that your council members, together with this office, continue to attempt to having an external consultant contracted to do the study on administrative staff positions and to develop an equitable compensation plan.

Market Adjustments
The establishment of a formal compensation plan with pay ranges for positions should protect employees from losing ground to the market.

There is a misunderstanding on who initiates requests for market adjustment surveys. The majority of the requests come from supervision/management. A summary of the requests for the last two fiscal years is shown below:

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Individual Employee Requests</th>
<th>Number Employees Requested by Supervision</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992-1993</td>
<td>15</td>
<td>33</td>
<td>48</td>
</tr>
<tr>
<td>1993-1994</td>
<td>15</td>
<td>35</td>
<td>50</td>
</tr>
</tbody>
</table>

The requests for surveys have included not only concerns on being underpaid when compared with the market, but also salary compression within the market as well as salary compression between administrative and classified staff. In addition, surveys requested have also affected peer groups. During FY 1992-1993 surveys were conducted on five peer groups, including individuals with the same job title or a group of titles within an office or area. For FY 1993-1994 surveys have been conducted on one position involving a peer group of ten, and a second survey was conducted on a hierarchical group of five employees in one office or area.

Regarding tracking of requests and in conjunction with the cutoff date for requesting surveys, Personnel Services has already established an internal procedure that includes providing notification of receipt to requesting individual employees as well as to supervisors who request surveys for their employees. In addition, all employees for whom survey data has been requested, will be notified of the results soon after Administrative Council has made their decision on each individual. A status report, though not initially considered by this office, can be provided to the requesting individual should the process take longer than expected.