



Review of the UMD Policies and Procedures Concerning Tuition Remission

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| PRESENTED BY | Jane Hirshberg, Chair |
| REVIEW DATES | SEC – April 10, 2020 SENATE – April 22, 2020 |
| VOTING METHOD | In a single vote |
| RELEVANT POLICY/DOCUMENT | VII-4.10(A) Policy and Procedures Concerning Tuition Remission for Faculty and Staff VII-4.20(A) Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff |
| NECESSARY APPROVALS | Senate, President |

ISSUE

In November 2019, the Senate Executive Committee (SEC) received a proposal calling for the revision of two University policies addressing tuition remission for employees, their spouses, and dependent children. The proposal noted that neither policy has been updated since 1991, and neither accurately reflects current practice or University System of Maryland (USM) policies. In January 2020, the SEC charged the Staff Affairs Committee with reviewing both policies, consulting with relevant stakeholders, reviewing similar policies and procedures at Big 10 and peer institutions, considering whether certain elements of the policies should be aligned with current practice, and recommending changes to the policies, as appropriate.

RECOMMENDATION

The Staff Affairs Committee recommends that the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University consider reviewing the fees paid by employees who take courses at the institution and determine which should be considered mandatory.

COMMITTEE WORK

The Staff Affairs Committee consulted University Human Resources on the policies and on current practice regarding tuition remission for employees and their spouses and dependent children. The committee also reviewed USM policies covering tuition remission, and considered policies and procedures at other USM institutions. The committee developed revisions to more closely align with USM policies and current University practice, and that more directly focus on employees at this institution.

The committee also considered the mandatory fees that are charged to employees who take courses, which are the same fees as are charged to undergraduate and graduate students. In some cases, employees have been charged separately for services and privileges that should have been covered by their mandatory fees, due to their dual roles as employees and students. While the USM policy requires that employees pay mandatory fees, the committee noted that it may be possible for the University to consider establishing a new category of mandatory fees that are specific to employees who take courses, which led to the committee's administrative recommendation.

After due consideration, the Staff Affairs Committee voted to approve the revised policies and an administrative recommendation by an email vote concluding on April 6, 2020.

ALTERNATIVES

The Senate could choose not to approve the revisions to the Policy and Procedures Concerning Tuition Remission for Faculty and Staff and the Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff. However, the University would lose the opportunity to ensure that these policies align with current practice and USM policies.

RISKS

There are no associated risks to the University in adopting these recommendations.

FINANCIAL IMPLICATIONS

There are no known financial implications for revising the two policies. There could be financial implications depending on the outcome of the University's review of the recommendation related to mandatory fees paid by employees who take courses.



Review of the UMD Policies and Procedures Concerning Tuition Remission

2019-2020 Committee Members

Jane Hirshberg (Chair)
Max Balagtas-Badoy (Non-Exempt Staff Contingent II)
Amelia Barabak (Ex-Officio Provost's Rep)
Darrell Claiborne (Ex-Officio NV CUSS Rep)
Jaison Cooper (Exempt Staff Contingent II)
Everett Daviage (Exempt Staff - Division)
Robert DuDonis (Non-Exempt Staff - Division)
Cathy Fisanich (Non-Exempt Staff - Academic)
Sarah Goff (Ex-Officio CUSS Rep)
Elizabeth Hinson (Ex-Officio NV CUSS Rep)
Antionietta Jennings (Non-Exempt Staff - Division)
Rythee Lambert-Jones (Ex-Officio Director of Human Resources Rep)

Anne Martens (Ex-Officio VP Administration & Finance Rep)
Kalia Patricio (Ex-Officio CUSS Rep)
Jeanne Pekny (Non-Exempt - Academic)
Brianne Rowh (Exempt Staff - Division)
Margaret Saponaro (Faculty)
Maureen Schrimpe (Ex-Officio CUSS Rep)
Kristin Stenson (Exempt Staff - Academic)
Brooke Supple (Ex-Officio VP Student Affairs Rep)
Timea Webster (Exempt Staff - Academic)

Date of Submission

April 2020

BACKGROUND

In November 2019, the Senate Executive Committee (SEC) received a proposal calling for the revision of two University policies addressing tuition remission: the Policy and Procedures Concerning Tuition Remission for Faculty and Staff (VII-4.10[A]) and the Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff (VII-4.20[A]). The proposal noted that neither policy has been updated since 1991, and neither accurately reflects current practice or University System of Maryland (USM) policies. In January 2020, the SEC charged the Staff Affairs Committee with reviewing both policies, consulting with relevant stakeholders, reviewing similar policies and procedures at Big 10 and peer institutions, considering whether certain elements of the policies should be aligned with current practice, and recommending changes to the policies, as appropriate (Appendix 3).

CURRENT PRACTICE

The University's current policies and its approach to tuition remission align with the general principles and intent of the USM policies, but they have not been updated in thirty years to incorporate revisions to the USM policies that occurred during that period. The USM policies provide broad discretion to each institution to implement specific practices related to tuition remission. University Human Resources' (UHR) practices offer more flexibility and expand access to tuition remission in order to align with USM policies and to reflect evolving trends in education.

COMMITTEE WORK

The Staff Affairs Committee consulted with UHR on the revised policy drafts included with the proposal. The committee gathered information on how tuition remission is currently administered for employees, their spouses, and their dependent children, and identified key elements of the current policies that should be revised. The committee worked to identify differences between the University's

current policies and the corresponding USM policies, and between the University's current policies and UHR's practice surrounding tuition remission.

The major differences between the University's policies and the USM policies include:

- The USM policy covering employees provides remission of up to 8 credits per semester. The University policy for employees remits up to 7 credits per semester.
- Dependents and spouses are required to pay mandatory fees. The University policy for spouses and dependents does not address fees.

The major differences between the University's policies and UHR's practice surrounding tuition remission include:

- UHR provides remission for credits taken during winter and summer sessions, and for twelve-week courses. The University policy for employees only allows remission during "semesters."
- UHR provides remission for up to 8 credits over the course of the summer sessions. The University policy for employees remits up to 6 over the two sessions.
- UHR provides remission for eligible CII employees. The University policy for employees does not permit remission for CII employees.
- UHR provides remission for the entirety of differential tuition for undergraduate courses. The University policies do not address differential tuition.
- The University policies do not indicate under what circumstances an employee, their spouse, or their dependent is required to reimburse tuition remission if the employee leaves the University. UHR requires employees to reimburse the institution if they leave the University before the drop/add deadline for the relevant term.
- For graduate courses, UHR only remits tuition based on the standard graduate credit hour, and students are responsible for any tuition costs above that. The University policy for employees only addresses the number of credits covered by tuition remission, while the policy for spouses and dependents references "100% tuition remission" for graduate courses.
- UHR provides tuition remission for winter terms (4 credits for the standard term, 6 for the twelve-week term). UHR also provides remission for courses taken over the summer sessions (8 over the course of the two sessions). The University policy for employees only references semesters, while the policy for spouses and dependents does not address semesters or terms at all, and instead indicates that it provides "100% tuition remission."

The committee reviewed similar tuition remission policies and procedures at other institutions. Given that the Senate's ability to propose changes is constrained by the USM policies, and given the limited scope of its charge, the committee decided to focus its peer research on similar policies at other USM institutions. Nearly all of those institutions simply reference the USM policies. Of the two institutions that do have standalone policies, neither includes a level of detail approaching that of the University's current policies. Rather than following approaches taken by other USM institutions, the committee revised the proposed drafts by adapting language from the USM policies, framing them to be more

applicable to employees at this institution, and aligning them with current UHR practices as described above. The committee also struck references to graduate assistants in the University policy for employees, as remission for graduate assistants is now addressed by the USM Policy on Graduate Assistants (III-7.11).

The committee also considered the fees that are charged to employees who take courses at the University. In the past, the University has waived mandatory fees for employees. In 2019, the USM announced that this practice was not permitted under the USM policy covering tuition remission for employees; since fall 2019, employees have been responsible for paying mandatory fees. Committee members reported instances of employees being charged separately for services and privileges that should have been covered by their mandatory fees, due to their dual roles as employees and students. At present, the University has two categories of “mandatory fees,” one for [undergraduate students](#) and one for [graduate students](#). Committee members noted that some of the fees within each category are not applicable to faculty and staff who are taking classes. The USM policy requires that faculty and staff who take courses pay mandatory fees. However, the committee noted that it may be possible for the University to consider which fees should be considered mandatory for employees who take courses, which led to the committee’s administrative recommendation.

The revised policies were reviewed by UHR, the Office of the Registrar, the Graduate School, and the Office of General Counsel, none of whom had concerns. After due consideration, the Staff Affairs Committee voted to approve the revised policies and an administrative recommendation by an email vote concluding on April 6, 2020.

RECOMMENDATIONS

The Staff Affairs Committee recommends that the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University consider reviewing the fees paid by employees who take courses at the institution and determine which should be considered mandatory.

APPENDICES

Appendix 1—Current Policy and Procedures Concerning Tuition Remission for Faculty and Staff (VII-4.10[A])

Appendix 2—Current Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff (VII-4.20[A])

Appendix 3—Charge from the Senate Executive Committee



VII-4.10(A) UNIVERSITY OF MARYLAND POLICY ON TUITION REMISSION FOR FACULTY, STAFF, AND RETIRED EMPLOYEES
(Approved by the President August 1, 1991)

I. Purpose

The University of Maryland (the University) supports the continuing education of current and retired faculty and staff by providing tuition remission to enroll in academic courses for the improvement of skills or for personal development.

II. Definitions

- A. "Differential Tuition" means an additional amount charged on top of base tuition for specific undergraduate academic programs.
- B. "Employee" means a regular status faculty member, a regular staff member, or a Contingent II staff member who occupies a position at the University that is intended to last at least six months and is at least 50% FTE.
- C. "Retiree" means a person who has previously held a regular status faculty or staff position within the USM, and who is receiving a periodic distribution from the Maryland State Retirement and Pension System and/or a Maryland Optional Retirement Plan. Retirees who enrolled in a retirement plan prior to July 1, 2011, must have earned at least five years' FTE of USM service credit to be eligible for Tuition Remission under this policy. Retirees who enrolled in a retirement plan on or after July 1, 2011, must have earned at least ten year's FTE of USM service credit.
- D. "Tuition Reimbursement" means repayment for certain tuition costs.
- E. "Tuition Remission" means the waiver of tuition, including Differential Tuition, charged for undergraduate academic courses, and the waiver of the standard graduate credit hour for graduate courses.

III. Policy

- A. Number of Credits
 - 1. Full-time Employees and Retirees from full-time positions are entitled to receive Tuition Remission for courses taken at the University as follows:
 - a. 8 credits each for the fall and spring semesters

- b. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
 - c. 8 credits over the course of both the Summer I and Summer II sessions
2. Part-time Employees and Retirees from part-time positions are entitled to Tuition Remission for credits prorated to their percentage of time worked.
 3. Audit courses and non-credit courses will be assigned the equivalent number of hours in determining the number of hours which may be carried, and the number of hours for which tuition may be remitted.
 4. The maximum total number of hours of Tuition Remission available at the University shall be determined by the Senior Vice President and Provost.

B. Eligibility

1. Enrollment in a course at the University is subject to the individual's admissibility to the University based on normal admission standards, and the fulfillment of all course prerequisites.
2. Tuition Remission for courses taken at other USM institutions shall be subject to the Employee or Retiree's admissibility to the institution and to the program in which the courses are to be taken, including other academic regulations of the institution governing student enrollment.
3. In order to ensure the operations of the University, enrollment in daytime courses by Employees requires the permission of their unit head.

C. Tuition Reimbursement

1. Employees may be reimbursed for the cost of tuition upon successful completion of a course offered by a two-year or four-year institution that does not participate in the USM tuition remission program if:
 - i. the Employee's unit head determines that a specific course is job-related and will contribute to the Employee's job performance;
 - ii. the course is not available at any institution that participates in the USM tuition remission program; and
 - iii. operations and resources permit the Employee's enrollment in and reimbursement for the course.
2. Tuition Reimbursement for courses taken at institutions that do not participate in the USM tuition remission program are subject to the following limitations:
 - i. The maximum reimbursement per semester shall be for one course, not to exceed 4 credit hours.

- ii. An Employee may not enroll in more than 8 credit hours of coursework in a semester for which the Employee is receiving a combination of Tuition Reimbursement and Tuition Remission.
 - iii. Graduate course reimbursement may be limited to the amount currently charged for a graduate credit hour at the University.
3. The Employee's unit head must submit a written reimbursement recommendation to the Assistant Vice President for Human Resources before the first class meeting of the recommended course. Advance approval of the Assistant Vice President for Human Resources or designee is required in order for the Employee to receive Tuition Reimbursement.
4. The Employee is responsible for paying tuition and related fees to the institution offering the approved course.
5. To be eligible for reimbursement, Employees must earn a grade of "C" or better in the course.
6. Upon successful completion of the course, the Employee must submit a request for Tuition Reimbursement, documenting the tuition amount to be reimbursed and the Employee's grade.

D. Absence from Work to Attend Class

1. If enrollment in a course is required by an Employee's unit head, the Employee may be absent from work for not more than one-half day on days when classes are scheduled. The Employee will not be required to make up for time away from work to attend class.
2. If enrollment in a course is not mandatory, the Employee should enroll in a class that meets during non-work hours, if feasible. The Employee must either take leave or make up for any hours of work lost for a course that is not required by their unit head.

E. Fees & Costs

1. Employees and Retirees are responsible for the payment of all mandatory fees for courses taken at the University or elsewhere.
2. Employees and Retirees will be responsible for the differential cost between each credit hour and the amount currently charged for a graduate credit hour at the University.
3. If an Employee who has received Tuition Remission in a given term leaves the University prior to the end of the drop/add period for that term, the Employee will be financially responsible for the full cost of the tuition.



VII-4.20(A) UNIVERSITY OF MARYLAND POLICY ON TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF FACULTY, STAFF, AND RETIRED EMPLOYEES

(Approved by the President August 1, 1991)

I. Purpose

In order to better support its current and former employees and advance its commitment to providing exceptional educational opportunities to residents of the state of Maryland, the University of Maryland (the University) provides tuition remission for the spouses and dependent children of current and retired faculty and staff.

II. Definitions

- A. "Dependent Child" means the child, stepchild, or legally adopted child of a University Employee or Retiree who:
 - 1. is under the age of twenty-six prior to an institution's course registration deadline for the semester or term for which Tuition Remission has been requested; or
 - 2. is twenty-six or older and claimed as a dependent on the Employee or Retiree's federal income tax return for the year(s) in which Tuition Remission is granted.
- B. "Differential Tuition" means an additional amount charged on top of base tuition for specific undergraduate academic programs.
- C. "Employee" means a regular status faculty or staff member who occupies a position at the University that is intended to last at least six months and is at least 50% FTE.
- D. "Retiree" means a person who has previously held a regular status faculty or staff position at the University and who is receiving a periodic distribution from the Maryland State Retirement and Pension System and/or a Maryland Optional Retirement Plan. Retirees who enrolled in a retirement plan prior to July 1, 2011, must have earned at least five years' FTE of University System of Maryland (USM) service credit in order to be eligible for Tuition Remission. Retirees who enrolled in a retirement plan on or after July 1, 2011, must have earned at least ten year's FTE of USM service credit.
- E. "Spouse" means a person in a marriage recognized by the state of Maryland, with an Employee or Retiree.
- F. "Tuition Remission" means the waiver of tuition, including Differential Tuition,

charged for undergraduate academic courses, and the waiver of the standard graduate credit hour for graduate courses.

III. Policy

Spouses and Dependent Children of Employees and Retirees may receive Tuition Remission subject to the following provisions.

A. Eligibility for Tuition Remission

1. Spouses and Dependent Children of full-time Employees or Retirees hired before January 1, 1990, are entitled to receive 100% Tuition Remission for undergraduate or graduate courses taken at any USM institution. Tuition remission for undergraduate and graduate courses taken at the University is granted as follows:
 - i. Unlimited Tuition Remission for fall and spring semesters
 - ii. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
 - iii. 8 credits total for both Summer I and Summer II sessions
2. Spouses and Dependent Children of full-time Employees or Retirees hired on or after January 1, 1990, are entitled to receive Tuition Remission under the following conditions:
 - i. The student will receive 100% Tuition Remission for courses taken toward a first undergraduate degree as follows:
 - a. Unlimited Tuition Remission for fall and spring semesters
 - b. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
 - c. 8 credits total for both Summer I and Summer II sessions
 - ii. The student will receive 50% Tuition Remission for undergraduate courses taken toward a first undergraduate degree at another USM institution to which the student has been accepted. The remaining 50% of tuition costs are the responsibility of the student.
 - iii. Employees hired on or after July 1, 1992, are not eligible for Tuition Remission for their Spouses or Dependent Children until they have been employed by the University for at least two years.
3. Spouses and Dependent Children of Employees and Retirees of the University of Maryland Extension, the Agricultural Experimental Station, and the former University of Maryland Biotechnology Institute will receive 100% Tuition Remission for courses

- taken toward a first undergraduate degree at any USM institution.
4. If a former USM Employee is rehired by the University within three years of separation from prior USM employment, the Spouse and Dependent Children of the rehired Employee will be eligible for Tuition Remission according to the Employee's original USM hire date under the terms provided for in Section III.A.1-2 above.
 5. For Spouses and Dependent Children of University Employees and Retirees who are employed in, or retired from, a position at 50% or more time, the percentage of tuition remitted will be proportional to the percentage of employment service.

B. Admissibility

1. Tuition Remission is subject to the Spouse or Dependent Child's admissibility to the University or USM institution and to the program in which the courses are offered, and to other academic regulations governing student enrollment.

C. Tuition Remission and Deceased University Employees and Retirees

1. Subject to the requirements and limitations of this policy, Spouses and Dependent Children of full-time Employees or Retirees who die while employed or after retirement will be permitted to register for courses with Tuition Remission.
2. The number of years of allowable Tuition Remission is dependent on the Employee or Retiree's years of USM service. Spouses and Dependent Children will receive Tuition Remission for:
 - i. one academic year, if the Employee or Retiree was employed with the USM for less than three years;
 - ii. two academic years, if the length of employment was at least three but less than five years;
 - iii. three academic years, if the length of employment was at least five but less than seven years;
 - iv. four academic years, if the length of employment was at least seven but less than nine years; and
 - v. five academic years, if the length of employment was nine years or more.
3. For Spouses, eligibility for Tuition Remission will continue for a maximum period of seven years after the Employee or Retiree's death.
4. For children, eligibility will continue as long as the child of the deceased Employee or Retiree qualifies as a "Dependent Child" under Section II.A.
5. For Spouses and Dependent Children of part-time Employees or Retirees who were employed at 50% time or more and who die while employed or after retirement, the

percentage of Tuition Remission will be proportional to the percentage of employment service averaged for the three years immediately preceding the Employee's retirement or death.

D. Fees & Costs

1. Individual students are responsible for the payment of all mandatory fees for courses taken at the University or elsewhere under the terms of this policy.
2. For the Spouses and Dependent Children of Employees and Retirees identified in III.A.1., individual students will be responsible for the differential cost between each credit hour and the amount currently charged for a graduate credit hour at the University.
3. If an Employee who has received Tuition Remission in a given term for a Spouse or Dependent Child leaves the University prior to the end of the drop/add period for that term for any reason other than those addressed in III.C., the Employee will be financially responsible for the full cost of the tuition.