

1987

Personnel Welfare Committee - Correspondence 1986-1987

Bowling Green State University. Administrative Staff Council

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1. Light Ink
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Bowling Green State University

Vice President for
Academic Affairs
Bowling Green, Ohio 43403-0020
(419) 372-2915
Cable: BGSUOH

September 3, 1986

MEMORANDUM

TO: Joan Bissland
Ann Bowers ✓
Susan Darrow
Chris Dunn
Kathy Hart
Linda Katzner
Barry Piersol
Kathleen Steiger
Kathryn Thiede
Jane Wood
Paul Yon

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

A handwritten signature in cursive script, appearing to read "E. E. Clark".

As you are aware, the new policy on evaluation of administrative staff asks that each vice president establish a committee composed of the area's representatives to Administrative Staff Council for the purpose of developing a written format for evaluations. I am, therefore, requesting that you meet for that purpose. I will attend your first meeting in case you have questions and in order to establish a mutually agreeable timetable. You may then wish to elect a chair and to sub-divide the group to carry out particular tasks. My secretary, Ms. Magrum, will be contacting you to set up a meeting time.

Enclosed (Exhibit A) is a copy of the evaluation form developed three years ago for use in the academic affairs area. Earlier this summer, I asked the deans to report on their experience in using this or other forms. Their responses are enclosed for your information. (Identifying college names have been removed.)

skg

enclosures

PERFORMANCE EVALUATION
Administrative Staff

Scoring Criterion:

1 - 7 (1 = unsatisfactory, 7 = outstanding)

SCORE

- I. Performance of Assigned Duties (50%) _____ x 5 = _____
Quality of Work, Quantity of Work, Planning, Administration, Decision Making, Initiative, Adaptability, Communication Skills, Other
- II. Professional and Interpersonal Relationships (30%) _____ x 3 = _____
Supervisory skills, Attitude, Peer relationships Service to University constituency, Other
- III. Professional Development (10%) _____ x 1 = _____
Conferences, Coursework, learning new skills Other
- IV. University Service (10%) _____ x 1 = _____
Participation on committees, participation with professional organizations, service on governance bodies, other

COMPOSITE SCORE _____

- V. Overall Narrative Evaluation
To include: description of areas for potential developmental opportunities or professional growth; discussion of areas of strength; description of areas of needed improvement

we have not heretofore had extensive written goals and objectives for administrative staff. A document was put into place for the 1932-33 year (attached) which has governed our administrative merit since that time. We have used the attached document to rank all administrative staff on a scale of 1-10, with basic job responsibilities comprising 80-90% of the point value. The Dean has had the discretion to adjust the point values assigned by supervisors upward or downward by 2 points before assigning final values and dollar amounts.

The current system has worked fairly well for us. The small number of staff involved has meant that dollar amounts are small. Differences in ranking have been minimal.

The job duties of administrative staff even within are so disparate that it is difficult to compare them for merit purposes. Therefore my predecessor was hesitant about making great distinctions among the administrative staff at merit time.

A uniform system of scoring in various categories, based upon written, mutually-agreed-upon objectives for the year, would provide a good university-wide basis for administrative merit. I believe that the basis for administrative merit should be standardized and university-wide, but that the merit judgments themselves should continue to be made within the colleges.

ADMINISTRATIVE STAFF

MERIT POLICY/PROCEDURE

The evaluation of job performance and the awarding of merit are by their nature interrelated. Performing one's job at a satisfactory level and in a competent manner is expected. Merit is to be awarded for performance above and beyond that expectation.

Meritorious service may be represented by:

- A. Performance of basic responsibilities exceedingly well, above expected levels, in one or more of the following areas (80-90%)
 - 1. subordinate or peer relationships
 - 2. client relations
 - 3. policy development
 - 4. procedural innovation
 - 5. exceptional performance in extreme situations

- B. Additional accomplishments not a part of the basic job responsibilities (20-10%):
 - 1. professional development
 - 2. service to the University Learning Resources, or the Library.
 - 3. research/publication/presentations
 - 4. initiation, development and implementation of innovations.

- C. Other events or circumstances worthy of note (to be detailed separately; but included in A or B for merit consideration)

Procedure:

Annually, each administrative staff employee will submit to his/her immediate supervisor a brief written statement (outline is acceptable) reporting meritorious service in categories A, B, C, listed above. The report is to cover the most recent calendar year, or the same time period as the annual evaluation. It is to be submitted prior to the annual evaluation.

The immediate supervisor will assign a numerical rank from 1 (low) to 10 (high) for merit based on the written statements, the annual evaluation for the same time period, and his/her own considered judgment, and report to the Dean. The Dean may, at his/her discretion, adjust the ranking up and or downward not more than 2 points before awarding dollar amounts for merit. Each employee will be advised of the dollar amount by the Dean prior to the issuance of the next annual contract. The decision on merit money may be appealed to the Dean.

NOTE: This policy/procedure is to be in effect for merit allocations for the calendar years 1983, 1984, 1985 or until the Administrative Staff Advisory Committee, or other appropriate body, develops another acceptable instrument/procedure.

A SELF-EVALUATION GUIDE FOR MERIT INCREASE

- A. Be as brief as possible.
- B. Follow this format.
- C. Submit a typed original to _____ with a copy to _____
- D. Attach a copy of your goals.
 1. Goals achieved.
 2. List of goals not achieved.
 3. Reasons for not achieving goals.
 4. List of committees served on.
 5. Give a list (if any) of any new ideas developed and tried during the year and also any conference/seminar/workshop attended.
 6. Other. (Anything else you may want to add. Please be brief.)

(over)



Bowling Green State University

Administrative Staff Merit and Evaluation

A committee comprised of _____ was appointed by _____ to develop a plan to evaluate the administrative staff for salary increments.

The committee makes the following recommendations:

1. That at the beginning of each fiscal year each Director is to set goals for his/her area which are to be approved by _____. These goals are to be consistent with the goals of _____. A copy of the goals is to be shared with the other Directors for input.
2. That a mid-year evaluation of the goals occur and that an opportunity for modifying or changing of the goals be permitted at this time. The possibility is allowed not because an individual cannot accomplish the original goals, but for the betterment of the program and change in program direction. These modifications must be approved by the _____. Where changes or modifications are made, these are to be shared with other Directors.
3. At the end of each year (normally in May - this year they are due to _____ on April 15, 1984) a self-evaluation report outlining the goals achieved, goals not achieved and reasons for not achieving the goals for the year is to be submitted to _____. Self-evaluations are to be copied and shared with the other Directors.
4. The following areas are to be considered in judgments determining merit: (category a. should receive most weight in determining merit)
 - a. Achievement of approved annual or modified goals. We perceive that this should be the single most important condition and criterion for a merit increase.
 - b. Service - includes service to students, faculty, other offices and external agencies.
Service on committees - serving on all kinds of committees is to be recognized (e.g., serving on University-level committees as well as conducting staff meetings) and attendance at relevant conferences and seminars.
 - c. Idea Generation - includes development of a new program, a new plan for growth and improvement in office performance, or improving existing practices to increase productivity.
5. _____ is to verbally share _____ views as to how the merit pool was distributed. Persons with outstanding performance/contributions should be able to earn more than 40 percent of merit if monies are available.

Exhibit D

I appreciate having the opportunity to review with you some of my thoughts concerning the performance evaluation form currently in use in Academic Affairs.

I understand that you will meet with members of the Administrative Staff Council to develop a format to be used in our area and I am concerned that an instrument be developed which allows for the variety of assignments one finds within Academic Affairs. An individual assigned to run the Art Gallery might not on the surface have much in common with the head of library acquisitions or with the polygraph technician in Psychology--yet, all are administrative staff and all would be evaluated for job performance on the basis of the same evaluative instrument because all fall within Academic Affairs.

Over the years, some concern has been expressed with the current form because it requires a numerical evaluation in an area of subjective measurement; one staff member has put it very succinctly: "We tend to give ourselves the illusion of certainty where ambiguity is the measure." Additionally, concerns have been expressed over the opportunity for University service (some individuals simply never get that opportunity because of an inflexible work schedule and they should not be penalized 10 percent on an evaluation), and the availability of professional development (although Ms. Susan Caldwell has made a real contribution to this effort in the past year).

In view of the need for flexibility and with the goal-setting now required as part of the evaluation process, I would like to suggest the attached as a basis for discussion. Given the variety of responsibilities held by

Administrative Staff within Academic Affairs, I believe it is imperative to develop an instrument that is both applicable and flexible.

If I may be of further assistance in this matter, please feel free to call on me. I would be happy to discuss my concerns in greater detail if that would be useful.

(over)

Academic Affairs
ADMINISTRATIVE STAFF PERFORMANCE EVALUATION

Category I

Performance of primary duties, basic responsibilities, pre-established performance goals.

Quality of work as evidenced by such things as: planning skills, decision-making skills, initiative, flexibility, adaptability, commitment, communication skills, subordinate and peer relationships, client relations, policy development, procedural innovation, facilities management, and other applicable skills as noted:

80-100%

Category II

Performance of occasional duties or additional accomplishments not part of the basic job responsibilities to include such things as: professional development (conferences, coursework, new skills), service to the unit, department, College, University, research, publications, presentations, awards, honors, teaching, initiation, development and implementation of innovations, exceptional performance under extreme/unusual circumstances, or other evidence, as noted.

Such exemplary occasional duties or additional accomplishments are to be specified for the individual as part of the annual evaluation process and assigned a rating proportion which is commensurate with the time and effort invested.

0-20%

Category III

Other events or circumstances worthy of note (to be detailed in writing and assessed as part of Category I).

MERIT PERFORMANCE EVALUATION GUIDELINES
ADMINISTRATIVE STAFF

Self-Evaluation

Each staff member shall submit to his/her supervisor a written self-evaluation which includes the following items.

1. A photocopy of the current job description for the position.
2. A photocopy of the goals established for the staff member for the current year.
3. An evaluation by the staff member of the extent to which those goals have been met. This should include an account of any new goals that were set during the year and evaluation of the extent to which they have been met.

(In the event that no goals were set for the current year, items 2. and 3. should be replaced by a statement of the staff member's accomplishments.)

4. Recommendations by the staff member of goals for the coming year.
5. Any suggestions the staff member has to offer concerning how performance might be improved.

Supervisor's Evaluation

Supervisors will review each staff member's self-evaluation and forward a merit evaluation to

..... This evaluation will be composed of both a narrative evaluative review of the self-evaluation and a translation of that review into a quantitative evaluation using the form provided for this purpose.

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MERIT PERFORMANCE EVALUATION RATING
ADMINISTRATIVE STAFF

Name _____

Rate on a scale 1 - 7 in each category
(1 = unsatisfactory, 4 = average, 7 = outstanding)

1. Performance of Assigned Duties _____

Quality and quantity of work
Administration, planning, decision-making
Initiative, adaptability, communication skills
Other

2. Professional and Interpersonal Relationships _____

Supervisory skills
Attitude
Peer relationships
Service to University constituency
Other

3. Professional Development _____

Conferences
Coursework
Learning new skills
Other

4. University Service _____

Participation on committees
Participation with professional organizations
Service on governance bodies
Other

Supervisor

In response to your memorandum of July 16, 1986, I have reviewed the Performance Evaluation Form and Procedures for Administrative Staff. is the only person in the College on an administrative staff contract supported by University funds.

I find that the form has not been used for previous evaluations. In the past, the administrative staff have been evaluated with the same process used for the Dean's Staff. I have shared the form with and others and with their approval will use the form as adopted by administrative members for future evaluations.

Exhibit G

I must admit that I have not specifically used the performance evaluation form for our administrative staff members. Instead I have written narrative comments covering the major points of job performance. Although I have not assigned specific weights to categories, it is my belief that 20% for professional development and university service is a bit high. In our cases the people are very active in both of these areas, but the activities always relate directly to their position. Thus the service in particular really becomes part of their jobs.

Otherwise, I have no major problems with the form. The key, however, will continue to be the communication and the narrative comments. You can capture much more there than on a strict numerical scheme. I would certainly hate to see the numerical score ever used on a comparative basis because each of the positions is very different.

Exhibit H

In response to your request, I provide comments on the performance evaluation form for administrative contract staff:

We have used the form "as is" (without variations) for evaluation of administrative contract staff in

It has met our needs quite well. The only suggestion we might have at this time for improvement would be to eliminate numerical scoring. While the relative emphasis on each category (i.e., "performance of assigned duties" as most important, "human relations" as next, and so on) seems appropriate, it is difficult to quantify performance on these particular criteria. This is especially true when, as is often the case, an individual reviewer is evaluating a small number of persons.

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. Each Vice President should 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	learning new skills
innovations	University and professional service
professional development	peer relationships
interpersonal relationships	research/publications/presentations
counseling	communication skills
awards/honors	student evaluations
teaching	
service on governance bodies	
facility management	

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.

- B. 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 Office of Administrative Staff Personnel Services and to the staff member.



Bowling Green State University

Vice President for
Academic Affairs
Bowling Green, Ohio 43403-0020
(419) 372-2915
Cable: BGSUOH

October 1, 1986

MEMORANDUM

TO: ~~Deans~~

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

RE: Administrative Staff Performance Evaluation Policy

The Administrative Staff Handbook contains a policy on evaluations (attached) which calls for each vice president to work with the area's representatives to the Administrative Staff Council (ASC) to develop a format for use in the evaluation of administrative staff. You will recall that in the late summer I asked each of you to respond regarding your use of the evaluation form. Your comments, with college names removed, were sent to the ASC representatives in Academic Affairs. Your responses were very thoughtful and helpful to me and to the ASC representatives. On September 29, I met with this group, and I am communicating to you their recommendations as agreed upon at that meeting.

Because of the diversity of duties and expectations across the academic affairs areas, it was recommended that the actual format of the evaluation form be left to the individual collegiate units. Any evaluation used, however, must address the three major issues contained in the attached evaluation policy, i.e., performance of primary duties, performance of occasional duties, and attainment of agreed upon goals. In your evaluations of the present form, several of you mentioned dissatisfaction with using a numerical scoring. As you work on developing a procedure for evaluation, you may wish to include more narrative evaluative comments as opposed to quantified evaluations.

Another part of the policy that is of critical importance is contained in 4,B and 5. All supervisors are to provide a yearly written evaluation of each administrative staff member. This evaluation is to become a part of the staff member's personnel file in the Office of Administrative Staff Personnel Services. The ASC representatives were particularly concerned that this portion of the policy be adhered to.

The administrative staff members also recommend that self-evaluation be a part of the evaluation process. This should take the form of a reporting of the activities that have been undertaken during the year, the goals achieved, and the goals not achieved.

Deans
October 1, 1986
Page two

Please note also in the policy the recommendation that the supervisor and staff member meet early in each evaluation period to discuss goals for the next year and to make any necessary changes to the job description. Any major changes made to the job description should be filed with the Office of Administrative Staff Personnel Services. At both the beginning of each year or at the end of the evaluation period there is, therefore, an excellent opportunity to discuss with the staff member the goals for the past year and for the upcoming period. I urge that you assure that such discussions are taking place and that staff members are also routinely evaluated in writing.

As you begin to implement the provisions of the evaluation policy, you should meet with administrative staff members in your collegiate area in order to develop an evaluation form that fits your needs. Another point to consider is whether, for some units, an evaluation cycle on a calendar year basis might be more appropriate than on an acadmic year basis. This timing question is for you and your staff members to decide.

dmm

enclosures

- xc: Joan Bissland
- Ann Bowers ✓
- Susan Darrow
- Kathy Hart
- Linda Katzner
- Barry Piersol
- Gail Richmond
- Kathryn Thiede
- Jane Wood
- Paul Yon

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. Each Vice President should 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	learning new skills
innovations	University and professional service
professional development	peer relationships
interpersonal relationships	research/publications/presentations
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awards/honors	student evaluations
teaching	
service on governance bodies	
facility management	

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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.

- B. 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 Office of Administrative Staff Personnel Services and to the staff member.

PERFORMANCE EVALUATION
Administrative Staff

Scoring Criterion:

1 - 7 (1 = unsatisfactory, 7 = outstanding)

SCORE

- I. Performance of Assigned Duties (50%) _____ x 5 = _____
Quality of Work, Quantity of Work, Planning,
Administration, Decision Making, Initiative,
Adaptability, Communication Skills, Other
- II. Professional and Interpersonal Relationships (30%) _____ x 3 = _____
Supervisory skills, Attitude, Peer relationships
Service to University constituency, Other
- III. Professional Development (10%) _____ x 1 = _____
Conferences, Coursework, learning new skills
Other
- IV. University Service (10%) _____ x 1 = _____
Participation on committees, participation
with professional organizations, service on
governance bodies, other

COMPOSITE SCORE _____

- V. Overall Narrative Evaluation
To include: description of areas for potential
developmental opportunities or professional growth;
discussion of areas of strength; description of areas
of needed improvement



Bowling Green State University



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

Holdings: Northwest Ohio
University Archives
Great Lakes

MEMORANDUM

To: Jill Carr, Chair
ASC Personnel-Welfare Committee

From: Paul D. Yon, Director *Paul*
Center for Archival Collections

Re: Personnel Welfare Committee

Date: 10 October 1986

I am about to leave on an extended vacation and would appreciate it if you would call a meeting of the Personnel Welfare Committee. This meeting in essence would be an organizational one that could draft an agenda of items for consideration for the 1986-87 academic year. Susan Darrow, can provide you with previous minutes and other pertinent information relative to the Committee's work.

Since I will assume the position of ASC Chair in November, I will no longer officially serve on the Personnel Welfare Committee. However, I would like to attend as many sessions as possible. May I suggest scheduling the meetings so they will coincide with the monthly ASC meetings. For example, holding them the first Tuesday or Wednesday of each month.

I spoke with Rich Hughes and James Austermilller and both indicated an interest in serving so you now have a full complement. Good luck. Thanks a lot. Best wishes, and I will see you upon my return.

PDY:11e

P.S. I just received the enclosed package from Marybeth Zachary. This should be addressed by the Committee.



Bowling Green State University

October 24, 1986

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

MEMORANDUM

TO: Harold Lunde, Chair, Faculty Welfare Committee

FROM: Jill Carr, Chair, Administrative Staff Council Personnel Welfare Committee

Jill Carr

As the Administrative Staff Council Personnel Welfare Committee begins its work for the 1986-87 academic year, we find that the Faculty Welfare Committee is discussing some of the same issues.

In light of this, we wish to take the opportunity to invite you to one of our Personnel Welfare Committee meetings. During this time we would like to share our thoughts regarding insurance benefits and proposals being made by Benefit Plans Risk Management. In addition, we would like to explore any other items of common concern.

The Personnel Welfare Committee meets at 3:00 on the first Monday of each month in the Housing Office Conference Room located on the 4th floor of the Student Services Building. Please let me know if it would be possible for you to meet with us in December or January.

I will look forward to hearing from you soon. If you have any questions, please do not hesitate to give me call.

Thank you.

cc: Paul Yon
PWC Committee Members



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

October 24, 1986

MEMORANDUM

TO: Susan Caldwell, Director, Administrative Staff Personnel Services

FROM: Jill Carr, Chair, ASC Personnel Welfare Committee *JC*

RE: 1986-87 Personnel Welfare Committee

I would like to take this opportunity to let you know that I will be taking Paul Yon's place as chairperson of the ASC Personnel Welfare Committee. I am looking forward to working with you and hope that you will feel free to contact me at any time with issues that need to be addressed by this committee.

The 1986-87 committee will have four members: Rich Hughes, Jim Austermler, Susan Darrow, and me. We will meet at 3:00 in the Housing Office Conference Room on the first Monday of each month. I am sure that we will be requesting your attendance at some of our meetings as we proceed with our tasks for this year. To date, we have chosen the following issues for investigation/recommendation.

1. Maternity Leave
2. Insurance Benefits
3. Termination/Grievance Policy
4. Release Time for Chair and Secretary of ASC
5. Salary and Merit Recommendations

How we proceed with these issues will depend on the feelings of the ASC Executive Committee and the Council as a whole.

Please feel free to call if you have any questions. Again, I am pleased that we will have the opportunity to work together.

JC/jm

cc: Paul Yon
PWC Members ✓



Bowling Green State University

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

November 7, 1986

MEMORANDUM

TO: Jill Carr, Chair
ASC Personnel Welfare Committee

FROM: Susan Caldwell, Director *Susan*
Administrative Staff Personnel Services

SUBJ: Revisions to the Administrative Staff Handbook

Thank you for your memorandum advising me of the proposed agenda for the Personnel Welfare Committee this year. I will be happy to assist you in any way I can as you begin to investigate these issues.

One item that was not listed in your memo was the general review of the Administrative Staff Handbook. In past years the Personnel Welfare Committee has reviewed the handbook to determine if there are any editorial, clarification, or other revisions that are not related to policy changes. Proposed changes to existing policies or the addition of new policies to the handbook are treated separately. Most of the items listed in your agenda would be policy recommendations.

Several years ago, it was decided that the employee handbooks should be reviewed once a year by the Board of Trustees, at their April meeting. Last year, for a variety of reasons, we were not able to present our handbook to the Board until June. However, it is my understanding that we should continue to target the April meeting for the final review and approval of the handbook (and all changes) that will become effective the following July 1. With that in mind, I have set the following deadlines that will allow this office time to include the proposed editorial revisions in the handbook and will ensure time for necessary review/approval by the Administrative Staff Council, the Administrative Council, and University legal counsel prior to the April Board meeting.

Suggestions on editorial revisions to the handbook from the Personnel Welfare Committee to Administrative Staff Personnel Services by December 31, 1986. (These changes will be incorporated into the Handbook).

Proposed policy recommendations/changes should be approved by the Administrative Staff Council at the February 1987 meeting. (These changes will be presented in memorandum form; they will not at this time be incorporated into the Handbook document).

The Handbook with the editorial revisions and separate documentation on policy recommendations should be sent to Administrative Council by early February 1987.

Once approved by Administrative Council editorial revisions and policy recommendations should be sent to University legal counsel by February 28, 1987.

Final approved changes (editorial and policy changes) should be incorporated in the handbook by Administrative Staff Personnel Services by March 15, 1987.

These copies are then duplicated by Administrative Staff Personnel Services for mailing to the Board of Trustees by March 31, 1987. Handbook reviewed by the Board of Trustees at the April meeting.

Since I will be leave of absence shortly after the first of the year, I would appreciate your adhering to this deadline schedule. Marcia Euckenmyer will be able to incorporate the editorial revisions into the handbook in the proper review format (changes appear in capital letters, deletions are shown with a line through them, etc.) The policy changes/recommendations are not incorporated into the handbook until the final copy is prepared for the Board of Trustees.

I will contact you within the next few weeks to discuss the handbook review process and this schedule. In the meantime, please consider if the FWC will review the handbook for any editorial revisions which must be submitted to this office by the end of December.

SC:mmb
xc: Paul Yon

add paragraph pertaining to role and mission statement



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

Nov. 17, 1986

TO: Members of the ASC Personnel Welfare Committee
FROM: Jill Carr, PWC Chairperson *JCC*
RE: Meeting with Harold Lunde, Chair, Faculty Welfare Committee

Dr. Lunde has responded to our invitation to attend a PWC meeting.

He has a conflict with our Dec. 1 meeting, so he has agreed to meet with us on Dec. 3 at 3:00 pm if this is convenient for us. Please let me know as soon as possible if you will be able to attend this meeting.

Thank you.

cc: Paul Yon



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

Nov. 17, 1986

TO: Jim Austermler, Member, ASC Personnel Welfare Committee
FROM: Jill Carr, Chair, PWC *JJC*
RE: Fringe Benefits and Cost Containment Proposal

Now that we know that our recommendation regarding the proposed Cost Containment program is due by Jan. 1, it will be necessary of the PWC to move quickly on this issue. The Executive Committee has requested that we handle the collection of Administrative Staff input through the communication network. They have also asked that we gather staff input regarding fringe benefits in general. Our request for increases in fringe benefits will need to be included with the proposal for salary increases.

Would you prepare a sample survey for our Dec. 1 PWC meeting? Hopefully, the committee will approve this survey and we can pass them out at the 12/4 meeting of the full Council. Please include items that will gather input on the Cost Containment program as well as our fringe benefit package in general.

Thanks so much for your assistance. Please give me a call if you have any questions.

cc: PWC Members
Paul Yon ✓



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

November 25, 1986

TO: ASC Personnel Welfare Committee Members
FROM: Jill Carr *Jill*
RE: Revision of Administrative Staff Handbook

One of our projects for this year is to edit and/or revise the Administrative Staff Handbook. I have received a request from Susan Caldwell that we follow a time line established by her office. Enclosed is a copy of the memo I received from Susan.

In light of the first deadline to be met, I am requesting that each of you come to our Dec. 1 meeting with suggestions regarding the revision of this manual. These should not be policy changes, only editorial or grammatical revisions. We can then discuss these at our meeting and I will forward them to Susan by the 12/31 deadline.

Please let me know if you have any questions.

Thank you!

JC/jm

Enclosure



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

November 25, 1986

TO: Lorene Malanowski, Continuing Education
Justine Magsig, Environmental Programs

FROM: Jill Carr, Chair, ASC Personnel Welfare Committee *Jill Carr*

RE: Increased Benefits for Part-time Administrative Staff

This year, the ASC Personnel Welfare Committee has decided to focus attention to increasing benefits for part-time administrative staff. In order to do this effectively, we would like to have input from part-time administrative staff members. Both of you have been recommended as individuals who would be helpful in providing this input.

I am requesting that you serve on a sub-committee of the Personnel Welfare Committee. This sub-committee will investigate the needs and desires of the part-time staff and make a recommendation to the full committee for revisions, additions, etc. The proposal will then go to ASC, from there to Susan Caldwell, and ultimately to Administrative Council, the President, and the Board of Trustees for final approval.

I will schedule our first meeting as soon as I have received a response from each of you. I will look forward to hearing from you soon. Please give me a call if you have any questions.

JC/jm

cc: Paul Yon ✓

Committee Report - Submitted by Sharon Franklin

Topics Discussed at University Insurance Committee
December 3, 1986

1. Cost Containment Measures were discussed. This subject was tabled until the next meeting since there still needs to be more information brought before the various committees and until further action is taken by the Faculty Welfare Committee of the Faculty Senate.

The Cost Containment Measures need to be done to hold down the cost of the insurance premiums being paid out so we do not have to pick up part of that cost out of our own paycheck.

2. Discussed the subject of DRG (Diagnostic Related Groupings) Prospective payment program and if the University may have any interest in this type of plan. Medicare now has this type of plan and several states have adopted this type of payment program. As far as the committee knows, the University has not looked into this type of program.
3. Hearing Aids were discussed and whether or not they were paid for by the University. Hearing tests performed due to an illness or injury are covered by the diagnostic program, but any tests done due to hearing loss because of age/deterioration of the eardrum are not covered. Clarification needs to be made regarding the interpretation of a "prosthetic device" since some coverage is listed under the major medical program for prosthetic devices such as artificial limbs, etc.
4. It should be noted that as of January 1, 1987 the requirement for a second opinion should be enforced. There is no charge to the employee for getting the second opinion on those types of surgery that actually require a second opinion. If the employee does not get a second opinion on those special elective procedures. See below an excerpt from a letter received by all classified staff employees in August, 1986.

-- The Mandatory Focused Second Opinion will be implemented with respect to the following elective procedures:

Adenoidectomy/Tonsillectomy	Hernia Surgery
Cataract Surgery	Hysterectomy
Back Surgery	Joint Surgery
Coronary Artery Bypass	Mastectomy and Mammoplasty
Dilatation & Curettage (D & C)	Nose Surgery
Ear Drum Surgery	Ovarian Surgery
Foot Surgery	Prostate Surgery
Gallbladder Surgery	Thyroidectomy
Gastro-intestinal Bypass	Varicose Vein Surgery
Hemorrhoidectomy	Endarterectomy

The University insurance plan will pay the entire cost involved in obtaining the second opinion. Should the first and second opinions differ, the University will also provide total payment for the cost of a third opinion, should the patient wish to obtain one.

NOTE: If the required second opinion is not obtained, reimbursement will be made on an 80% basis, rather than 100% of the Usual, Customary, and Reasonable costs.

ROLE AND MISSION STATEMENT

Bowling Green State University is committed to a set of mutually agreed upon goals and purposes. This statement is referred to as the University Role and Mission Statement. All University personnel are encouraged to develop and fulfill objectives which will result in the attainment of the goals within this statement. All Administrative Staff members are urged to be familiar with this important document. The University Role and Mission Statement appears in Appendix _____.

MEMORANDUM

TO: Paul Yon
Administrative Staff Council

FROM: Rich Zera *RZ*
University Computer Services

SUBJECT: Salary increase policy for new employees

The purpose of this memorandum is to request that Administrative Staff Council address an issue which I feel is unfair and overly restrictive. Specifically, I feel that the policy regarding employees hired after December 31 not being eligible for reasonable salary increase in the subsequent July.

I am currently facing such a situation as I attempt to fill a position created by the untimely passing of Lynn Orwick. As I interview prospective candidates, who probably will not be able to start work until the first week of January, the absolute nature of the December 31 deadline seems rather absurd. Certainly, my ability to attract, hire, and retain the best possible candidate will be diminished when they are told that they are not eligible for a merit for 18 months. It is my firm belief that if a supervisor is expected to manage his/her area, that the worthiness of any employee for merit must be a managerial decision.

My personal recommendation is that the employee should be eligible for a full increase. Managerial discretion may, and frequently would, result in only partial merit being awarded...but that should be up to the manager. If full merit cannot be allocated, then I feel the only reasonable compromise would be full across-the-board and prorated merit if employment has been for less than 6 months.

I ask that this question be given the highest possible priority be ASC and that any decision rendered be retroactive to employees hired after January 1, 1987.

If you have any questions, please contact me at your convenience.

Thank you.

pc: R.L. Conrad, C.L. Schultz



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403
(419) 372-2011
Cable: BGSUOH

December 22, 1986

MEMORANDUM

TO: Administrative Staff Council Executive Committee
Members

FROM: Jill Carr, Chair, ASC Personnel Welfare Committee

RE: Editorial Changes for Administrative Staff
Handbook

Attached please find the list of proposed editorial changes for the Administrative Staff Handbook. In addition you will find several items that will require further attention as decisions are made within the University and on the Federal level.

The maternity/paternity/adoption leave policy will receive a major overhaul. A recommendation for a significant policy change will be forthcoming.

Please note that a section regarding the Role and Mission Statement will be added including the full statement as an appendix. In addition a short statement will be written regarding the merit system and will be suggested for addition to the section on evaluation.

Should you have any questions regarding this proposal, please feel free to contact me or any member of the Personnel welfare Committee. Thank you for your attention to this matter.

cc: PWC Members

Enclosure

ROLE AND MISSION STATEMENT

Bowling Green State University is committed to a set of mutually agreed upon goals and purposes. This statement is referred to as the University Role and Mission Statement. All University personnel are encouraged to develop and fulfill objectives which will result in the attainment of the goals within this statement. All Administrative Staff members are urged to be familiar with this important document. The University Role and Mission Statement appears as Appendix F.

EDITORIAL CHANGES FOR ADMINISTRATIVE STAFF HANDBOOK

PAGE	LOCATION	CHANGE
ii	Section III- 3rd parag.	correct "ratification"
iii	3rd parag. - line 3	correct "eligibility" spacing on "iii"
iv	1st parag. -line 5	one "l" in counseling
7	end of 1st parag.	correct spacing
10	2. - line 3	capital "u" in BGSU
19	1st parag. - last line	change "in" to "as"
20	parag. 5&6	dbl. space before PERS and STRS
23	B. line 3	correct "either"
25.1	last parag. - line 2	correct "whenever"
40	3rd parag. - line 4	change "may" to "will"
41	Key Replacement Policy	all "shall" to "will"
	Parking - line 5	correct "identified"
43	(4) - line 1	correct "medicare"
51	F. - line 1	remove "four"

Other items for consideration or correction:

- Page 7 - 3. Reporting Of Invention - should this policy change the appropriate update would need to be added. This is under consideration by the Faculty Senate at this time.
- Page 8 - A. Continuance - Last paragraph should be changed to the following wording: Recommendations for non-renewal (which will include supportive information) WILL BE MADE TO THE APPROPRIATE CONTRACTING OFFICER (PRESIDENT, VICE PRESIDENT, OR DEAN).
- Page 9.2 - A section will be added to describe the merit evaluation system and the evaluation process which should accompany this.
- Page 20 - Investigation needs to be done to determine if the mandatory retirement age can remain at 70 in light of the bill recently signed by President Reagan to do away with this age category.
- Work is being done to recommend a change in the maternity/paternity/adoption policy. This recommendation will be forwarded at a later date.
- It is suggested that the attached paragraph be added to Section I. The location would be between "Retirement" and "Sexual Harassment Policy". It is also suggested that a copy of the University Role and Mission Statement be added as Appendix F.

COST CONTAINMENT RESOLUTION

The Personnel Welfare Committee has addressed the proposed cost containment program for Bowling Green State University. The Personnel Welfare Committee supports cost containment as a means of reducing medical care costs which will be in the best interest of BGSU administrative staff employees.

Therefore, be it resolved that the current cost containment policy be accepted with the following recommendations:

1. Any cost savings realized as a result of cost containment be used to either reduce the cost of current benefits or fund additional benefits.
2. The last sentence of the proposal be modified to read "For emergency admissions, you or your representative should notify the BPRM cost containment department within 48 hours following admission OR AS SOON AS IS PRACTICAL UNDER THE CIRCUMSTANCES".
3. The current format of the Pre-admission Certification Card be changed to insure confidentiality of medical records.
4. A University-wide appeals committee be established to address claims settlement. This appeals committee shall consist of members representing: Faculty Senate, Administrative Staff Council, Classified Staff Council, Benefit Plans Risk Management, and the University Insurance Office.
5. The employee insurance card be changed to reflect the toll free BPRM telephone number. In addition, a statement requesting the hospital to contact BPRM in case of the inability of the patient to make a phone call be printed on the back of the card.

COUNCIL MEMBERSHIP WHILE ON LEAVE

In the event a Council member chooses to take an approved leave during his/her term of office, a permanent substitute will be chosen by the Council member prior to the beginning of said leave. This name shall be submitted to the Executive Committee one month prior to the beginning of the leave period. The substitute shall have full voting privileges and shall meet all obligations of a full council member. The option to designate a substitute for the purposes of an approved leave shall not exceed one year. Should an approved leave be granted for more than one year, the Council member shall be requested to resign their term or remainder thereof.

PWC members
ASC exec committee

FYI

Jul

Service Firms Merge

Benefits Plans Risk Management, Inc., a Findlay company which administers employee benefits plans, has merged with Wisconsin Pension and Group Services, Milwaukee, Wisc.

The purchase price was more than \$3 million, according to Rollie Hahn, president of Benefits Plans Risk Management.

The Findlay company will operate with its existing management and employees as a division of Wisconsin Pension and Group Services, Mr. Hahn said.

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.~~

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~~ 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 APPROPRIATE SUPPORTING WRITTEN DOCUMENTATION. FOR EXAMPLE, IN THE CASE OF NON-RENEWAL BECAUSE OF PERFORMANCE, APPROPRIATE WRITTEN DOCUMENTATION SHOULD INCLUDE COPIES OF PAST PERFORMANCE EVALUATIONS, WHERE AVAILABLE.

C. Termination 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. Termination for Cause~~

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

- ~~i) 1. conviction of a felony;~~
- ~~ii) 2. if credentials are proved to be fraudulent;~~
PROOF OF FRAUDULENT CREDENTIALS;
- ~~iii) 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.

7/86

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--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 ~~affected~~ 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.~~

~~A notice for termination for cause or release is not affected 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.

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

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.

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

IN THE FIRST THREE YEARS OF EMPLOYMENT;

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

Administrative Staff Council
Personnel Welfare Committee
January 13, 1987

Members Present: Austermilller, Carr, Darrow, Hughes

Guest: Deb McLaughlin

Carr reported the editorial changes to the administrative staff handbook and the Cost Containment resolution recommended by FWC were approved by Administrative Staff Council at the January 8th meeting.

Carr shared with the committee a draft of a description of Merit Pay and Merit Evaluation to be included in the administrative staff handbook. The committee approved the draft as presented. Carr indicated the next step is to bring the draft to ASC's Executive Committee for revision and/or approval. A copy of the draft is attached.

Carr reported the Executive Committee has requested that FWC develop and distribute a questionnaire to collect information to be included in the administrative staff salary request for the 1987 fiscal year. The questionnaire will need to be distributed and returned no later than January 31st so the results can be compiled and ready for the February 12th meeting of the Board of Trustees. The questionnaire will address the following items:

1. current level of education
2. current amount of teaching being done
3. number of grants written and received including monetary amounts
4. professional presentations made
5. publishing credits
6. professional association memberships and offices held
7. suggestions regarding additional fringe benefits to be added to the current fringe benefit package

Due to the time constraints Carr asked the committee's permission to allow her to design the questionnaire with a review by the committee when it is completed. The committee approved Carr's request.

Carr also reminded the committee that Benefit Plans Risk Management, the University's insurance benefit administrator, had been sold recently. In view of this change Carr asked the committee to sanction a request asking Paul Yon, ASC's chair, to schedule a voluntary meeting between ASC members and BPFM's new president to discuss his/her view of the proposed Cost Containment Program. In particular Carr is interested to see whether BPFM's new president shares the same philosophy toward Cost Containment as that expressed by Follie Hahn, BPFM's former president, at ASC's December meeting. Carr noted she was uncomfortable asking ASC to approve FWC's Cost Containment resolution at the January 8th meeting knowing that BPFM had been sold.

The committee reviewed a draft of the new maternity/paternity/adoption policy proposed by Darrow. The committee offered several editorial changes to the draft. A copy of the draft with suggested changes is attached.

MERIT PAY AND MERIT EVALUATION

Bowling Green State University implements a split salary increase procedure. Sixty percent of the increase percentage approved annually by the Board of Trustees is an across the board increase. Forty percent of the approved amount is awarded on the basis of meritorious performance. The merit evaluation and awarding procedure is determined by each Presidential or Vice Presidential area. Administrative Staff members are encouraged to be aware of the procedures incorporated within their area. For detailed information contact your Vice President.

It is felt by the Administrative Staff Council that the formation and expansion of families is crucial to the future and health of humanity and that the University must respond to the needs of staff members expanding their families while maintaining careers within the University. Since family needs are as crucial to the health of our nation as defense, the Administrative Staff Council seeks to align paid maternity/paternity/adoption benefits with military leave benefits currently in effect. Since becoming a new parent is neither a period of sickness (with exception to the minimum 30 working day recovery period by the person actually giving birth) nor a vacation, a significant portion of the maternity/paternity/adoption leave would be a paid leave for both men and women alike to aid in the adjustment in family life inherent in family expansion.

The following maternity/paternity/adoption leave policy for administrative contract staff will become effective July 1, 1987:

1. The minimum leave of absence for maternity leave for staff members will be 30 working days. Female staff members who give birth are eligible for 30 working days of paid sick leave per pregnancy. This is to be considered a benefit additional to the regular sick leave policy and is to be granted irrespective of length of employment at the University.
2. Staff members are also eligible for maternity/paternity/adoption leave with pay. Leave for maternity/paternity/adoption with pay cannot exceed 22 working days per pregnancy or adoption. Such leave is in addition to accrued vacation credit or accumulated sick leave.
3. Maternity/paternity/adoption leave for childbirth, childcare and/or bonding purposes will be allowed for up to 80 working days following delivery or adoption; an 80 working day leave will be considered customary and usual. No doctor's certification will be required for the 80 working day leave. The amount of leave taken will be up to the staff member, not his or her supervisor.
4. Prior to the maternity/paternity/adoption request, the staff member and supervisor will discuss the length of the leave requested with pay as well as the amount that may be covered under vacation benefits and amount to be taken as a leave of absence without pay. The maternity/paternity/adoption time the staff member intends to take for leave will be determined, if possible (unless the pregnancy becomes something other than normal or an adoption is arranged without much lead time), before the leave is started. Such intentions will be in writing and the agreement signed by both the staff member and the supervisor. Changes to the original agreement will be mutually agreeable.
5. A medical leave for a period of time before birth or a leave in excess of 80 working days after delivery or adoption will need medical certification. This is for use only in unusual situations.
6. A voluntary leave prior to birth or adoption will be charged to accrued vacation credit or may be arranged as leave of absence without pay.
7. A staff member may use any or all of his or her accrued vacation credit during the maternity/paternity/adoption leave before going on a leave of absence without pay.

8. A staff member may request a leave of absence without pay for that period of his,her expected absence that will not be covered by accrued vacation credit, the 30 working day maternity leave and the 22 working day maternity,paternity,adoption leave.
9. The University will cover insurance benefits during maternity,paternity,adoption leaves up to 80 working days duration. (It should be noted that in most cases, this will not be an additional benefit since insurance is already covered when on sick/vacation status for any portion of the calendar month in which the staff member is on paid status.)
10. In any case, should both parents be University employees, both are eligible for maternity,paternity,adoption leave benefits.
11. Paternity leave is considered identical to maternity leave with exception of the 30 working day minimum leave, which is ordinarily considered a minimum for physical recovery. Therefore, the paternity leave may be used by the father, for a period of 80 working days, with a paid leave of 22 working days per calendar year, making it equivalent to military leave. The maternity leave includes the 30 working day paid leave for physical recovery in addition to the 22 working days of paid leave.



Bowling Green State University

Office of On Campus Housing
Bowling Green, Ohio 43403-0151
(419) 372-2011
Cable: BGSUOH

January 21, 1987

MEMORANDUM

TO: FWC Members *Paul*
FROM: Rich Hughes *Rich*
RE: Maternity/paternity/adoption leave draft

Attached is a second modification to the draft of the MPA leave policy we reviewed at our January 13th meeting. The addition of items #4, #5 and #14 are the only changes. Please review this current draft and bring comments and suggestions to our next meeting.

It is felt by the Administrative Staff Council that the formation and expansion of families is crucial to the future and health of humanity and that the University must respond to the needs of staff members expanding their families while maintaining careers within the University. Since family needs are as crucial to the health of our nation as defense, the Administrative Staff Council seeks to align paid maternity/paternity/adoption benefits with military leave benefits currently in effect. Since becoming a new parent is neither a period of sickness (with exception to the minimum 30 working day recovery period by the person actually giving birth) nor a vacation, a significant portion of the maternity/paternity/adoption leave would be a paid leave for both men and women alike to aid in the adjustment in family life inherent in family expansion.

The following maternity/paternity/adoption leave policy for administrative contract staff will become effective July 1, 1987:

1. The minimum leave of absence for maternity leave for staff members will be 30 working days. Female staff members who give birth are eligible for 30 working days of paid sick leave per pregnancy. This is to be considered a benefit additional to the regular sick leave policy and is to be granted irrespective of length of employment at the University.
2. Staff members are also eligible for maternity/paternity/adoption leave with pay. Leave for maternity/paternity/adoption with pay cannot exceed 22 working days per pregnancy or adoption. Such leave is in addition to accrued vacation credit or accumulated sick leave.
3. Maternity/paternity/adoption leave for childbirth, childcare and/or bonding purposes will be allowed for up to 80 working days following delivery or adoption; an 80 working day leave will be considered customary and usual. No doctor's certification will be required for the 80 working day leave. The amount of leave taken will be up to the staff member, not his or her supervisor.
4. Staff members taking maternity/paternity/adoption leave are guaranteed their positions and job title upon return.
5. Prior to the maternity/paternity/adoption request, the staff member and supervisor will discuss the length of the leave requested with pay as well as the amount that may be covered under vacation benefits and amount to be taken as a leave of absence without pay. The maternity/paternity/adoption time the staff member intends to take for leave will be determined, if possible (unless the pregnancy becomes something other than normal or an adoption is arranged without much lead time), before the leave is started. Such intentions will be in writing and the agreement signed by both the staff member and the supervisor. Changes to the original agreement will be mutually agreeable.
6. It is assumed most staff will take 80 working days for maternity/paternity/adoption leave. Should additional time become necessary, mutually agreeable special arrangements may be made between the staff member and his/her supervisor.

7. A medical leave for a period of time before birth or a leave in excess of 80 working days after delivery or adoption will need medical certification. This is for use only in unusual situations.
8. A voluntary leave prior to birth or adoption will be charged to accrued vacation credit or may be arranged as leave of absence without pay.
9. A staff member may use any or all of his or her accrued vacation credit during the maternity/paternity/adoption leave before going on a leave of absence without pay.
10. A staff member may request a leave of absence without pay for that period of his/her expected absence that will not be covered by accrued vacation credit, the 30 working day maternity leave and the 22 working day maternity/paternity/adoption leave.
11. The University will cover insurance benefits during maternity/paternity/adoption leaves up to 80 working days duration. (It should be noted that in most cases, this will not be an additional benefit since insurance is already covered when on sick/vacation status for any portion of the calendar month in which the staff member is on paid status.)
12. In any case, should both parents be University employees, both are eligible for maternity/paternity/adoption leave benefits.
13. Paternity leave is considered identical to maternity leave with exception of the 30 working day minimum leave, which is ordinarily considered a minimum for physical recovery. Therefore, the paternity leave may be used by the father, for a period of 80 working days, with a paid leave of 22 working days per calendar year, making it equivalent to military leave. The maternity leave includes the 30 working day paid leave for physical recovery in addition to the 22 working days of paid leave.
14. Should a staff member decide not to return to the University following maternity/paternity/adoption leave, the staff member must notify his/her supervisor, in writing, no later than 30 calendar days preceding his/her scheduled return to work. Additionally, a staff member who fails to return to Bowling Green State University following maternity/paternity/adoption leave must repay the University for any maternity/paternity/adoption leave taken. Exceptions may be made by the area Vice President.



Bowling Green State University

January 27, 1987

Office of On Campus Housing
Bowling Green, Ohio 43403-0151
(419) 372-2011
Cable: BGSUOH

MEMORANDUM

TO: Paul Von, Chair, Administrative Staff Council

FROM: Jill Carr, Chair, Personnel Welfare Committee *Jill Carr*

RE: Merit Pay Statement for Handbook

The Personnel Welfare Committee wishes to forward the attached statement to the Executive Committee for their consideration and subsequent approval. This is in accordance with the plan to revise the Administrative Staff Handbook. This statement does not reflect a policy change. It is intended to be descriptive only.

Should you or any of the Executive Committee members have any questions, please do not hesitate to contact me.

Thank you for your time and consideration.

cc: FWC Members
ASC Executive Committee Members

enc.

MERIT PAY AND MERIT EVALUATION

Bowling Green State University implements a split salary increase procedure. Sixty percent of the increase percentage approved annually by the Board of Trustees is an across the board increase. Forty percent of the approved amount is awarded on the basis of meritorious performance. The merit evaluation and awarding procedure is determined by each Presidential or Vice Presidential area. Administrative Staff members are encouraged to be aware of the procedures incorporated within their area. For detailed information contact your Vice President.

Administrative Staff Council
Personnel Welfare Committee Members

Jim Austermler
Health Services
372-2277

Jill Carr
On-Campus Housing
440 Student Services Building
372-2011

Susan Darrow
231 Administration Building
372-8501

Rich Hughes
On-Campus Housing
440 Student Services Building
372-2011

Deb McLaughlin
516 Administration Building
372-2716

Paul Yon
Archival Collections
5th Floor Library
372-2411

BOOKSTORE

11. Would you shop at Bookstore if the employee discount were increased? Yes: 373 No: 95 Maybe: 169

MISCELLANEOUS

12. Are you a member of SRC? Yes: 104 No: 555

13. Would you like to be a membr of SRC? Yes: 350 No: 228

14. Would you likely join SRC if employees received a membership discount? Yes: 428 No: 181

15. Is vision insurance adequate? Yes: 400 No: 235

16. Experience campus parking problems? Yes: 433 No: 209

17. Should medical insurance provide hearing aids? Yes: 396 No: 74
N/A: 173

18. Is dental insurance adequate? Yes: 464 No: 170

19. Willing to pay for meal at holiday party? Yes: 188 No: 406

20. Aware that faculty are not required to use sick leave? Yes: 124 No: 492

21. Favor payment of 50% sick leave at retirement? Yes: 603 No: 33

22. Favor death/funeral benefit after retirement? Yes: 587 No: 29

23. Favor increase in life insurance? Yes: 309 No: 282

24. Favor annual physical paid for by BPRM? Yes: 534 No: 87

25. Favor dependent fee waivers after retirement? Yes: 457 No: 153

26. Favor reducing years of service for vacation? Yes: 430 No: 190

27. Favor release time for CSC meetings/elections: Yes: 496 No: 136

Ten questions receiving the most responses, i.e., total of YESs, NOs and, if applicable, N/As:

<u>Question</u>	<u>Total Number of Responses</u>
12	659
1	658
4	655
17	643
16	642
11	637
21	636
3 & 15	635
18	634
27	632

Ten questions receiving most support, i.e., highest percentage of positive (Yes) responses:

<u>Question</u>	<u>Percentage Yes Responses</u>
21 & 22	95%
1	87%
24	86%
7 & 27	78%
2	77%
6	76%
25	75%
18	73%
14	70%
26	69%

The following questions received least support:

<u>Question</u>	<u>Percentage of No Responses</u>
8	86% (No & N/A)
10	82% (No & N/A)
19	68%

Results of 1986-87 Classified Staff Survey
PART-TIME

- | | | |
|--|---|--------------------------|
| 1. Do you like summer hours? | <u>Yes: 34</u> | No: 4
N/A: 21 |
| 2. Does summer schedule affect ability to do job? | <u>No effect: 47</u>
Easier: 9
More difficult: 1 | |
| 3. Are you busy between Christmas and New Years? | Yes: 19 | <u>No: 28</u>
N/A: 13 |
| 4. What additional holidays do you want? | Good Friday: 32
Christmas Eve: 26
Personal days: 24
Day after Xmas: 15
Birthday: 12
New Years Eve: 8 | |
| 5. Do you favor floating MLK day? | <u>Yes: 44</u> | No: 13 |
| Preferences for floating MLK day were: | 1. Good Friday/18
2. Xmas Eve/14
3. New Years Eve
and Dec. 26th/5
4. Easter Monday/1 | |
| 6. Would you buy health insurance @ group rate? | Yes: 39 | No: 17 |
| 7. Want portion of health insurance paid (pro-rated) w/employee paying remainder? | Yes: 42 | No: 12 |
| 8. Willing to buy term life insurance @ group rate? | Yes: 24 | No: 30 |
| 9. Favor dependent fee waivers for retired permanent part-time classified employees? | Yes: 44 | No: 11 |
| 10. Would you be willing to use sick leave as personal day(s), if available? | <u>Yes: 56</u> | No: 3
N/A: 1 |

CHILD CARE

11. Difficulty finding adequate child care? Yes: 15 No: 12 N/A: 33
12. Should BGSU provide on-campus child care facilities? Yes: 36 No: 3 N/A: 21
13. If available, would you use BGSU child care facilities? Yes: 15 No: 8 N/A: 37

BOOKSTORE

14. Would you shop at Bookstore if the employee discount were increased? Yes: 37 No: 8 Maybe: 15

MISCELLANEOUS

15. Are you a member of SRC? Yes: 15 No: 47
16. Would you like to be a membr of SRC? Yes: 39 No: 11
17. Would you likely join SRC if employees received a membership discount? Yes: 47 No: 9
18. Experience campus parking problems? Yes: 41 No: 18
19. Willing to pay for meal at holiday party? Yes: 18 No: 40
20. Aware that faculty are not required to use sick leave? Yes: 11 No: 50
21. Favor payment of 50% sick leave at retirement? Yes: 58 No: 1
22. Favor reducing years of service for vacation? Yes: 45 No: 7
23. Favor release time for CSC meetings/elections: Yes: 48 No: 8
24. Additional benefits requested--see written comments.

Questions receiving most responses:

<u>Question</u>	<u>Total Number of Responses</u>
20	61
3, 10, 11, 12, 13 & 14	60
1, 18 & 21	59
19	58
2 & 5	57
6, 17 & 23	56
9	55
7 & 8	54
22	52
16	50

Questions receiving most support--highest percentage of positive (Yes) responses:

<u>Question</u>	<u>Percentage Yes Responses</u>
21	97%
10	93%
22	87%
23	86%
17	84%
9	80%
7 & 16	78%
5	77%
6	70%
18	69%

Questions receiving least support:

<u>Question</u>	<u>Percentage No Responses</u>
11 & 13	75% (No & N/A)
19	69%
3	68%