

**Staff Concerns
As Presented
Budget Advisory Committee**

Submitted by Staff Representatives, BAC

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Introduction

Thank you for giving us the opportunity to present the concerns of the staff members of Wheaton College. As is fairly well known by the members of the Budget Advisory Committee (BAC) there is currently much discussion about the probable change to the Employee Dependant Tuition Benefit. Having said that, as the staff representatives to BAC we also feel it was important to highlight the other concerns of staff members. Therefore we have divided our presentation into three parts; a history and review of the three major concerns of staff members, a discussion of the Dependant Tuition Benefit and the most recent survey conducted by staff representatives of BAC and finally a list of recommendations we feel might address and possibly alleviate the concerns of staff.

Survey Review

A review of recent surveys conducted by Staff Council and former staff BAC representatives drew an interesting picture of what staff members felt to be important issues. The results of the survey done in conjunction with the 2003 Benefits Review Committee showed staff salary increases (as compared to the percentage of increase for faculty), retirement contributions and health care costs and benefits to be the three most important concerns of staff members. In a survey conducted by staff BAC representatives in 2006, these same three issues were of major concern to staff. In 2007, another survey was conducted, but was specific to only employee benefits. Again, consistent with the findings of previous surveys, the three most important issues were salary, retirement benefits and health care. In the both the 2006 and 2007 survey an area was provided for comments regarding staff members concerns. Even in this area there was consistency. Comments regarding salary, health care and retirement were very similar from one year to the next.

We felt these results were very telling; first as an indication that staff members continue to voice the same concerns, year after year, after year; and second to put in context the results of and the comments generated by the survey conducted this year.

2008 BAC Tuition Benefit Survey

We felt that along with the aforementioned concerns, the tuition benefit for dependants was an ongoing question. Every year questions were posed regarding the importance of this benefit to staff members and every year it ranked far below the other concerns. Yet for those with a vested interest in the benefit it was the most important. And every year because of the questions there seemed to be a threat to its continuation. We believed that staff members wanted some kind of clarity to the questions regarding the benefit and felt that if a

discussion was to take place, the discussion should be based on the same information as was culled from a faculty survey.

With that in mind we distributed the following survey:

February 19, 2008

Wheaton College employs over 500 people and the Tuition Benefit Plan (all options combined) is used by approximately 13% of the employees. Faculty is very interested in finding a more equitable distribution of this benefit and asked faculty members to answer the following questions. In order to accurately compare the feelings (regarding this benefit) of faculty and staff it is important that the same information is compared.

Below are survey questions pertaining to the tuition benefit that were sent to all faculty members. Please take a few minutes to answer the questions. Space for specific comments has also been provided.

*In order to present this information to the Budget Advisory Committee we must have the survey returned next week. **Please refold with Staff Council Wheaton Box showing are return by February 25, 2008***

Thank you for taking part in this survey. We hope to present some preliminary information at the next All Staff meeting.

*Budget Advisory Committee Staff Representatives
Charlene Reynolds
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PLEASE INDICATE WHICH OF THE FOLLOWING TUITION BENEFIT PLANS YOU PREFER: (Please choose only one plan)

_____ **THE CURRENT TUITION BENEFIT PLAN (NO CHANGES)**
100% tuition remission at Wheaton (current worth \$36,430.00), Tuition Exchange (current worth up to \$25,000.00), and the \$1,000.00 grant toward tuition elsewhere.

_____ **THE 75/25 TUITION BENEFIT PLAN**
75% tuition remission at Wheaton, the Tuition Exchange and up to 25% of Wheaton's tuition elsewhere.

_____ **THE 50/50 TUITION BENEFIT PLAN**
50% tuition remission at Wheaton, the Tuition Exchange and up to 50% of the tuition elsewhere not to exceed ½ of Wheaton's tuition.

_____ **I HAVE NO PREFERENCE ABOUT THESE TUITION BENEFIT PLANS.**

Comments: Please comment on your choice

The results of the survey were presented at the March All Staff meeting and are as follows:

Survey's mailed 406
Survey's returned 171 or 43%

Response breakdown

86 respondents or 50%	No Change
52 respondents or 30%	50/50 (50% at Wheaton or 50% another school's tuition not to exceed 50% of Wheaton)
22 respondents or 12%	No preference
7 respondents or 4%	75/25 (75% at Wheaton or 25% of Wheaton's tuition to be used elsewhere)
4 respondents or 2%	Other

As in other surveys there was an area provided for staff members to make comments. Below is a representative sample of these comments.

Staff Members Speak Out

-Both the 75%/25% and 50/50 choices would be acceptable for me because I feel they actually open up more opportunities for students going off to college, and may make it possible for a student to actually go to their first choice.

- I do not feel as though an adequate description of the 75/25 and 50/50 plan has been given.

- I am glad to see that all three options include Tuition Exchange. I believe that the 50/50 option offers the most equitable costs "across the 3 options" and provides the greatest number of college choices.

- I think the 50/50 plan would help more Wheaton employees in a very significant way and would not be limited to those attending Wheaton or those fortunate enough to get TE at another school. I still want tuition remission for myself, the employee! \$1000 does not even pay for one course elsewhere! Wheaton does not provide a Master's Degree!!

- I feel that this tuition benefit should be distributed across as many Wheaton employees as possible, rather than only a small handful of employees receiving the benefit.

-50/50 benefit plan should do the following also: Grandfather people who have been here "x" number of years if they choose, and also 50% of the tuition should include fees, books, possibly board, but at the very least, fees should be included.

-Although I appreciate the opportunity to vote on this subject, I would like to have had a presentation on the benefits of each program choice before making a decision and voting.

-A key concern would be the definition of "tuition elsewhere." Does it include fees, books, etc? It would be better to have 50% of Wheaton tuition applied against total cost up to that "1/2" of Wheaton tuition figure. This would allow users to view state universities and colleges, where fees vastly rise above tuition (understanding room and board is separate). If this was not possible then the default to what we currently have may provide the best opportunity for an education.

- The current benefit is great!

-The 50/50 plan seems to give everyone more options for students of all academic abilities.

- It is a major reason why I work here. If this benefit were to change, I would seriously consider changing my employment.

- If any change is made, I think present employees should be grandfathered in.

It should be pointed out that after our survey was distributed information had come out regarding a possible change to the tuition benefit and President Crutcher addressed this issue at the meeting. After the results were given several staff members expressed concerns and question regarding the proposed changes. Because we were not able to answer their questions we advised staff members to email their concerns to the staff BAC representatives and that they would be included in our presentation. Please note, because we said we would include their concerns we felt we had to include them all. These are their concerns:

As a tuition grant recipient only for my student who is currently a University of Massachusetts sophomore, will I be able to enjoy the proposed improved changes to the program or will I be "grandfathered" and not be able to benefit from the new and improved program? Also, state school tuitions are small it is the fees that bring the cost up substantially. Will the changes include tuition and fees for dependent students attending state schools?

I was at the Staff Council Meeting today and want to express my concerns about the BAC survey and how it addressed the proposed Tuition Benefit changes.

1) Why can't there be a survey that only addresses the proposed changes on the table for Tuition Benefits and allow staff and faculty to only vote and express concerns on that issue only. I don't agree with ranking benefits because most people will only vote on how something currently affects them. If staff and faculty are not utilizing or affected by a change in Tuition Benefits then it will never become their priority.

2) It would be good for staff to know all the options on the table before any change is implemented.

3) There are over 500 colleges across the country on the Tuition Exchange program. How do the

majority implement it and afford to keep it? It would be nice for staff and faculty to know this answer instead of just comparing Wheaton College to what the Northeast Nine do with this benefit. If Wheaton truly wants to compete and attract faculty, staff, and students from across the country and even globally then just comparing yourself to the Northeast nine is too narrow a focus.

I hope that this makes it to the right people. I have several concerns and questions around the discussions today regarding the tuition benefit. Let me start by saying that it disappoints me that we were given a survey in which 50% of those that responded indicated that they wanted no change to the current tuition benefit, and yet I was told the same week the surveys went out that there would be change in the benefit. I was further told that not changing the tuition benefit would "bankrupt the College". In President Crutcher's presentation to us today at the Staff Association Meeting he indicated that no decisions had been made, but if you listened to him, it also sounded as though decisions have already been made. Why pass out a survey where 50% of those that responded check an option that doesn't appear to be an option in the eyes of the administration.

I would like to know if a decision has already been made on this. If not, will there be further opportunities to voice our concerns to those actually making the decision? Just how will leaving the benefit as is "bankrupt" the College? We were told that any decision that is made would be "revenue neutral". How can we stay revenue neutral if the tuition benefit will bankrupt us?

I just attended the March Staff Association meeting. It got me thinking about other potential changes to this benefit. Currently you have to be a full time employee for 4 years to qualify for this. Will this time frame be changing? Will it become 5 years? Will it become 2 years? This was something that did not appear to be included in the discussion. Thank you for taking the time to respond!

As it is quite apparent that there are impending changes in the tuition reimbursement, I have some concerns/questions/comments. I understand that you cannot speak for other schools, but I was wondering if you would be able to tell me how, for example, it would work in the following scenario: my daughter has been accepted at ABC College and her total cost is in excess of \$36,000. She has been given an academic scholarship of \$24,000 (\$6,000 annually), an \$8,000 grant (\$2,000 annually) and other financial aid (Perkins loan, Stafford loan, etc) that are roughly \$8,000 annually leaving us (her parents) with approximately \$20,000 that we have to pony up. Tuition alone is \$22,550 annually. Based upon what I heard this morning, Wheaton would provide 1/2 that amount (\$11,275 since it is less than 1/2 of Wheaton's tuition) as part of the new agreement. HOWEVER, I heard Martha Mitchell state that on the tuition exchange program, when she went to use the Wheaton tuition, her daughter's school deducted from her financial aid or awards. If that were the case, I could imagine ABC College lowering the financial aid, grant money and possibly even the scholarship by the \$11,275 so that basically we STILL end up owing \$20,000!!! This would NOT be a savings to us - it WOULD be a savings to ABC College, however.

Also, as Joe LaCascio pointed out, what would happen if someone were to send their child(ren) to a state college where the tuition is only \$910 year. Do you mean to tell us that Wheaton would provide someone who has worked here for over 15 years with just \$455 a year? State colleges, with all of their fees, can get pretty expensive - trust me, I know from experience!

Another thing that I wonder about: since I have been here for only a little over a year, my

daughter, who is a senior in college right now, would only be able to take advantage of the reimbursement maybe 2nd half of her junior year and all of her senior year, correct? Maybe it is time to rethink that for new (and existing) employees with less than 4 years employment. Since things are being changed, and arguably not to my best advantage, maybe the time requirement could be placed on the table - you get one year for each year you work. Just a thought.

Good morning BAC members,

I am writing to give you my feedback from the results that were released at the Staff Association Meeting on Friday, March 14th, regarding the BAC Tuition Benefits Survey 2008. I am very concerned with any changes that may occur with the tuition benefits because I am going to be eligible to use these tuition benefits for one of my daughter's in the Fall of 2010. It is disheartening to hear that the changes are likely to be effective the year that I need them. I have been with Wheaton College for five and a half years now. When I was offered the position I applied for in September of 2002, one of the "highlights" of my decision to join Wheaton's staff was in large part due to the tuition benefits that were discussed with me. I started out as a part-timer and then two and a half years later, (while looking down the road), I accepted another library part-time position (for a total of 35 hrs a week) so that I would be able to qualify for the "full-timer" tuition benefit package for when my first daughter enters her freshman year at college. From the BAC discussion on Friday, I am understanding that changes are going to take place. I heard that employees who have children entering the 2008 and 2009 years will not be effected. These changes will effect me in particular because I will be tapping into the 2010 year of change. I would like to propose that ALL "new" tuition benefit changes be effective with ALL "new" hires and not with the present staff that were hired under the current tuition benefit package which was originally offered to staff when hired. The current tuition benefit package should be grandfathered in for all current staff who were hired under the notion of the current tuition benefit package. I find it to be quite unfair if changes are to be grandfathered in for some current staff and not for other current staff and therefore feel that "new" hires be offered the "new" proposed tuition benefit changes. I hear that this current tuition package is too costly for the college to continue offering. Has it been discussed that "years of service" be lengthened for any newly hired employee under this new tuition benefit package that is in being proposed right now? This is one way to cut costs. I feel that now when I am closer to using and tapping into the tuition benefits, they are quickly slipping away. I am a hard working and dedicated Wheaton employee and this is a very important benefit for me and my family. My opinion is that the current benefit package should stand "as is" and be grandfathered in for ALL current staff. Let the "new" tuition benefit package become effective for ALL "new" hires.

Staff and faculty colleagues from the Benefits Review Committee, Budget Advisory Committee, and Economic Status of the Faculty Committee:

At the All-Staff meeting on Friday the President reported that the tuition benefit is under review and that all the plans under consideration involve the elimination of the Tuition Exchange program.

In addition, the 50/50 program that had been under discussion now seems to mean not 50% of Wheaton tuition and up to 50% of Wheaton's tuition elsewhere but only 50% of the total dollar amount of tuition charged to the parent by the other institution (in other words, if X college tuition is 40,000 but you get 20,000 in grants, you will be entitled to only 10,000 from Wheaton, or half the remaining tuition cost).

Both these changes are substantially different from anything we discussed in Benefits Review or in public forums, and David Bamford (Public Safety) and I think it is time to convene a meeting of as many of us from the relevant committees as possible. To that end, we would like to suggest that we meet next Tuesday, March 25, at 2 pm in the 1960 Room in Balfour-Hood.

I'm sorry we can't accommodate everyone's schedules, but I hope many of you will be able to attend. Please pass this notice on to anyone I've inadvertently missed. Thanks.

One area of concern to a few staff members was the definition of the "50/50" plan. They believed that 50/50 should be 50% of Wheaton's tuition at Wheaton or any other school, not to exceed the cost of tuition and fees at the other school. We felt it was a valid question and concern. But since we did not have any projected numbers for this scenario, we requested information from Human Resources. Barbara Lema and Rem Gordon (graciously and on very short notice) ran a projection of numbers for this scenario. [See separate handout]

Barbara and Rem stressed that it is important to understand that these figures are an example, using a very small sample from schools attended by those using the \$1000.00 grant program. In addition, they noted that the number taking advantage of the benefit, because of its new flexibility could jump (presently only 8 employees use the program) which could change these figures dramatically. If the savings from the change in the tuition benefit program are to be used to increase the percent for the retirement program, based on a continued increase in salaries and in Wheaton's tuition the amount of savings that could be applied to the retirement benefit may not be as great as anticipated. This leads us to believe that more information would be needed before the 50% of Wheaton's tuition anywhere plan could be considered a viable alternative.

Recommendations

Understanding the Benefits We Have

We believe the continuing staff concerns regarding salary, retirement and health benefits may be because many staff members are not aware of the reasoning and calculations that are part of the budget process for salary and benefit increases. As it was suggested, the Budget Advisory Committee process became more transparent. We believe that an effort to educate staff members in the benefit allocation process may help to ease their concerns or at the very least allow for an understanding of how the administration arrives at the figures for these benefits. We would recommend that this could be accomplished through the same type of meetings/trainings provided by human resources for TIAA CREF, stress management programs, etc.

Dependant Tuition Benefit

We believe that it is important that Staff members be kept abreast of the status of the probable benefit change. The concerns presented through e mails

and casual conversations seem to indicate a level of stress related to the lack of knowledge and information regarding this issue.

We would recommend that those involved in shaping the new policy include members of the Financial Aid department as a resource regarding the questions and multiple scenarios that need to be addressed in formulating this policy. This would help provide expertise in what can be a very complicated process.

Finally, we would recommend that once the new policy has been formulated and become a written policy, a series of meetings should be held to disseminate the information to Staff. These meetings could be facilitated through Staff Council and should include a panel of presenters available to answer questions.

Conclusion

As members of the Budget Advisory Committee we are privy to information that allows us a better understanding of why benefits and salary are what they are. We see where the money comes from and where it goes. But for the average staff member (similar to the view of many students) all they see is an increase in tuition and costs. They do not understand why there is no reciprocal benefit. We appreciate the opportunity to highlight the concerns of Staff Members and hope that a more transparent process with more frank discussions regarding salary, retirement and health care will alleviate some of the concerns of staff members and may even change the ranking of staff concerns in the next survey.