



2013 -2014 Educational Benefit Update

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*“This university needs its staff to be able to operate on the level it operates.”
– UC President Janet Napolitano*

SUMMARY

Over the past several years, several CUCSA delegations, the Council of Chancellors, numerous UC Presidents and the Academic Senate have supported the idea of expanding educational benefits to staff, faculty and their dependents. If implemented, UC would join the majority of U.S institutions of higher education in offering comprehensive tuition benefits to its employees. Preventing the idea from moving forward are the projected financial costs of expanding benefits systemwide and the unsuccessful attempts to find sustainable resources to fund the program indefinitely. Reflecting on the attempts of previous delegations to reform current policies and expand educational benefits to staff, the 2013-2014 CUCSA delegation has recommended that further analysis into the issue should be performed and new alternative solutions should be considered.

The 2013-2014 academic term marked a year of transition for the University. Not only was a new President appointed in July 2013, but the State of California’s budget became relatively stable as the state’s future fiscal outlook became optimistic for the first time in many years. The CUCSA workgroup viewed this as an opportunity to take advantage of the leadership change and stable funding environment to bring the issue of educational benefits to the agenda. First, to make President Napolitano aware of the staff desire to have educational benefits, representatives from numerous staff assemblies used the President’s campus tour to make it clear that expanding educational benefits was a priority for staff. Based on reports to the CUCSA delegation, the President informed staff members that she would look into the issue and get back with more information. At the March CUCSA meeting the delegation addressed this issue with the President for the first time as a group. In response, the President stated that she was interested in the idea, but further analysis would be required. Finally, in April, during a GoogleChat meeting with staff, this issue was brought to the President’s attention again. At this point she informed staff that while she does support the idea of offering educational benefits to staff and faculty, she sees establishing a predictable salary plan as a more pressing budget priority. She also stated that as online courses become available as part of [UC’s Innovative Learning Teaching Initiative](#) (ILTI), she would support tuition discounts for staff and their dependents. She recognized that course offerings were limited, but as the program develops, ILTI could offer courses staff would be interested in taking.

As a result of President Napolitano’s newly established position on educational benefits, the CUCSA workgroup is proposing several alternative ways to expanding educational benefits.

Recommendations:

- Collect data on cost of tuition assistance programs at other universities – At the heart of the educational benefits issue is finding a way to establish the financial viability of the program. Future CUCSA workgroups should collect additional cost data on the use of PPSM 51, on extensions that offer discounts to staff, and on other comparable universities offering educational benefits.

- Move away from focusing on the reformation of PPSM 51 – Based on the responses from the 2013-2014 CUCSA delegation, members requested the future workgroups focus less on the “broken” PPSM 51 policy and try to find new financially viable alternatives to offer educational benefits.
- Propose a multi-campus pilot– At the December 2013 CUCSA meeting, UC Riverside Chancellor Kim Wilcox informed the delegates that he was in support of educational benefits and that he would be willing to pilot the initiative on his campus. HR staff at UCOP confirmed that Chancellors retained the authority to make the decision without systemwide intervention. This included the understanding that UCOP would not provide funding and it would have to come out of the existing campus budget.
- Identify executive champions for educational benefits – CUCSA delegates informed the workgroup that they would like to see members of leadership approached on the campuses to become advocates for the expansion of educational benefits to staff. For example, UCSC Executive Vice Chancellor Alison Galloway has indicated that she would be supportive of offering educational benefits to staff making it easier to continue their education by getting a Masters degree or PhD.
- Poll staff to determine educational needs – Educational benefits can mean different things to different people. In order to clarify what type of educational benefits staff members are interested in, CUCSA should conduct an informal survey of staff assemblies. A survey would also help staff assemblies to learn whether staff are interested in educational benefits writ large or more specific professional development opportunities. In addition, CUCSA should work to ensure that not only staff, but also university leadership understand that there is a difference.
- Additional collaboration with Extension – With the President recently informing staff that she does not see the university expanding educational benefits broadly soon, the CUCSA workgroup and staff must think about fiscally viable alternatives. These alternatives include, but are not limited to, expanded collaboration with UC extension units. Currently these units not only offer tuition discounts to staff, but they also provide coursework analogous with the professional work of staff and could meet some professional development needs. UC extension programs also offer online courses and class times that align best with staff work schedules.

HISTORY OF CUCSA’S EFFORTS TO SUPPORT EDUCATIONAL BENEFITS

The requests and recommendations on educational benefits for UC faculty and staff have been going on for over 15 years. Per documentation available at Academic Senate and CUCSA websites, the following issues have been covered:

- In January of 2000, the [Academic Senate recommended](#) to President Atkinson a full waiver of educational fee at University of California to employee dependents. The proposal was, in principle, approved by UC administration. The letter in [September 2002 from the President](#) pointed, however, at the State's fiscal crisis and the \$5-\$6 million cost of the benefit. The waiver was considered a distraction from the need to increase salaries and meet increasing health benefits costs.
- The request, to be implemented in steps over four years, was repeated by [Academic Senate in January of 2004](#) to President Dynes. The [response in April](#) pointed at the State's fiscal crisis and

anticipated University budget shortfall. Salaries and quality of education were cited as higher priorities at that time.

- The [2006 CUCSA "Educational Fee Waiver" Workgroup Report](#) reiterated the continuing, for the last several years, full support by CUCSA of the Academic Senate proposal. It outlined the summary of the proposal, benefits of the program, and overview of educational waivers at comparable institutions. The report recommended a written commitment from the University to implement the program when fiscally feasible and phased-in rollout.
- "[A Review of the Reduced Fee Enrollment Policy](#)" was presented by CUCSA in a 2008 report. It pointed out the difficulties and non-uniformity of implementation of Reduced Fee Enrollment Program and outlined steps necessary to make the program equitable and easily accessible to all eligible personnel.
- Building on the previous work, the [2009 "Bridging the University of California's Educational Benefits Gap"](#) CUCSA workgroup report details the implementation of Reduced Fee Enrollment Policy, makes a comparative study of educational benefits offered to employees in higher education, recommends extension of the benefits to non-UC education, and coverage of dependents. The recommendations were motivated by UC's significant lag in educational benefits within a group of peer institutions.
- The latest [2012 CUCSA Educational Benefits Workgroup Report](#) had a closer look at the current Reduced Fee Enrollment Policy and concluded that it is neither functionally nor financially sound. The report outlined steps to modernize the program and recommended CSU educational benefits as a potential model to follow.

This academic year, 2013 -2014, the most significant event was the hiring of new UC President Janet Napolitano and the stating of her position that she does not feel educational benefits is a high priority at this time. Reflecting on the current and previous attempts by CUCSA delegations to reform current policies and expand educational benefits to staff, the 2013-2014 CUCSA delegation has recommended that further analysis into the issue should be performed and new alternative solutions should be considered.

OVERVIEW OF THE BENEFITS OF EDUCATIONAL BENEFITS

As covered by previous CUCSA workgroups, it is in the University's best interest to offer educational benefits to staff and faculty. Potential benefits of offering educational benefits to staff/faculty and their dependents could improve employee morale, increase retention rates, provide career opportunities for advancement and create a pipeline for succession planning—as older staff retire, younger staff are qualified to apply for those positions. Offering such benefits would also increase and retain a diverse population of staff and faculty. As UC strives to reflect the diversity of the state of California, many potential staff and faculty do not apply for positions on our campuses because they do not see others like them in the system. Offering an educational benefit would be an added incentive to join our UC family. Furthermore, according to the [UC Accountability Report](#), a report produced by the Office of the President to track indicators of the University's performance in a wide variety of areas, our staff population is very diverse across lower-ranking positions and not very diverse across the higher-ranking positions. The offering of educational benefits would encourage staff from all backgrounds in the lower-ranking positions to acquire the necessary skills to progress and be competitive for higher level university positions that are known to reflect less diversity. This practice would also enable the hardworking members of our community to progress in their careers. Working for UC should be part of

the transformative student experience. Just because we are working does not mean that we can no longer learn and be part of and experience the transformation. UC has a larger number of alumni who chose to stay and work for UC. Staff and faculty want to participate in and benefit from the UC mission of instruction.

ANALYSIS OF ALTERNATIVES

Based on the work of the former CUCSA working groups, the 2013 – 2014 CUCSA working group decided to analyze several alternative ideas not previously considered.

Online Education

On a couple of occasions President Napolitano has stated that the UC's online course offerings will be a great option for staff in the future. While it is recognized that online courses could provide staff, from all around the system, the opportunity to take courses at other campuses, the CUCSA workgroup does not view this as an option for the immediate future. The reasoning is that the focus of UC in developing its suite of online courses is to relieve stress on lower division, highly enrolled courses. With the Governor's earmarking of \$10 million for the development of online education at UC and Cal State, the emphasis politically is similar to the University's focus in that the state wants highly enrolled courses to find relief through being placed online. While lower division courses are important, we believe these kinds of courses might not meet the needs for staff since they could either take the course at a community college for less money and transfer, or take similar courses online elsewhere or through a different program for free.

However, there still is value in having CUCSA work with ILTI in the future. What makes ILTI unique is that it not only offers a discount for staff, but also for dependents. In the history of educational benefits at UC, this is completely new. Employee dependents are also more likely to take advantage of online courses offered in impacted majors. Dependents could take these courses as UC students, or take them before entering UC. The CUCSA workgroup supports the work in this area, and we encourage that other self-supporting units, such as extension, offer similar benefits.

Online education also has a role going forward because the [University of California has invested in the development of Massively Open Online Courses \(MOOCs\)](#). These courses are offered across the system and allow staff to take free courses from UC faculty on anything from professional development topics to personal enrichment. With UC's investment in these types of courses, staff have been provided with new opportunities to take courses and benefit from UC's excellent educational programs.

Collaboration with UC Extension

With the President informing staff that she does not see the University expanding educational benefits to staff in the immediate future, CUCSA and staff must think about fiscally viable alternatives. One of these alternatives includes future collaboration with UC Extension units. Currently these units not only offer varying tuition discounts to staff, but they also provide coursework that relates most closely with the assumed needs of staff. UC Extension programs also offer online courses and class times that align best with staff work schedules. One of the most notable partnerships between a campus and an extension is taking place at UC Berkeley.

Case Study – UC Berkeley’s L+OD Program

In 2011 UC Berkeley embarked on the Operational Excellence initiative to bring vision into action. With a focus on generating new net revenue, reducing costs, and/or improving operations, it was clear that the campus would need to know what job families and skill sets would be required to take the campus into the future. Leaders from campus functional units worked with campus HR to choose a menu of UC Berkeley Extension offerings and provided paid training and career development opportunities to staff members who chose to pursue them. For three consecutive years, this UC Berkeley Sponsored Tuition Program offerings have included:

- Business and Management: Accounting, Agile Management, Business Administration, Business Analysis, Business Communication, Business Process Management, Finance, Human Resources, Law, Leadership and Management, Project Management
- Computer Technology and Information Management: SAS, SPSS, Quantitative Analysis and Analytics; Database Management; Information Systems and Management; Open Source and Operating Systems; Programming Languages and Object Oriented Programming; Virtual and Cloud Computing
- Environmental Studies: Environmental Engineering and Management (Energy, Environmental Management)
- Written Communication: Writing, Editing and Technical Communication, Editing, Technical Communication, Writing English as a Second Language (Writing, Grammar, Speaking)

The program model has recently been expanded to Office of the President—not fully sponsored, but with reduced pricing. Formats for these courses include in-person and online. Independent study courses have been discontinued due to low completion rates.

In this sponsored tuition model, the extension office enrolls the individual based on the application form with the supervisor signature and the staff ID to verify eligibility in the as opposed to an individual enrolling using the standard UC Berkeley Extension online, phone and mail options.

Berkeley Extension provides Sponsored Tuition Program progress reports to the Berkeley campus Learning + Organizational Development Program office. The reports are then aggregated. With two years of data now collected, there could be a planned effort to correlate efficacy of this particular program. The billing to the University is monthly by enrollment with internal payment via the campus chart of accounts tool. According to the program office, in the five semesters since Spring 2012, there were 960 enrollments in the program, and the most popular classes were:

- Project Management
- Procurement Management
- Women & Leadership
- Grant Writing
- Counseling Techniques for Educators

The CUCSA workgroup supports programs like the Berkeley L+OD Program and encourages other campus leaders to work with their local extension offices to offer discounted or no-cost benefits to staff.

Institutional Investment

Furthermore, while the CUCSA workgroup supports the allowance of staff to enroll in all types of courses and degree programs, another reason to support further collaboration with the extensions is because the types of courses extension offer courses that are considered to be most beneficial to the institution. As noted in a the [2007-2008 CUCSA workgroup report](#), CUCSA believes that staff and the University would be best served by enrolling in programs such as business, law, education and other professional programs. However, campus leadership has asked that these professional programs be left exempt from PPSM 51. Institutions around the country, such as UC Berkeley, Cal State and Stanford, understand the value these programs and they have invested in encouraging staff to take professional courses that relevant to the work of the individual.

FINAL RECOMMENDATIONS

Recommendations:

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APPENDIX

Bullet point recommendations presented at June 2014 CUCSA quarterly meeting:

- Continue to request UCOP to compile current data on PPSM-51 usage and costs
- Look for local senior leadership champions for staff educational benefits
- Host informal staff conversations on educational priorities
- Develop a plan in cooperation with local staff assemblies for proposing a pilot program on a campus or multiple campuses
- Costing educational benefit programs at other universities
- Collaborating with ILTI and extension deans
- Quantify cost benefits to UC of a better educated staff

Resources:

- Academic Senate – Reports and Recommendations:
<http://senate.universityofcalifornia.edu/reports/>
- CUCSA Workgroup Reports:
http://www.ucop.edu/cucsa/workgroup_reports.html
- UC Staff Hangout with President Janet Napolitano, Apr. 16, 2014:
<https://www.youtube.com/watch?v=YHofxmTnaHE>