



THE COMMONWEALTH OF MASSACHUSETTS
BOARD OF REGENTS OF HIGHER EDUCATION

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4.15.84 Rec'd from Jim Cox
as the only policy of
#122 - 84 Series is what
is meant in
Article IV

TO: Public College and University Presidents and Chancellors
FROM: John B. Duff *John B. Duff*
Chancellor
RE: Systemwide Tuition Remission Policy
DATE: May 21, 1984

I am pleased to inform you that I have approved the enclosed Systemwide Tuition Remission Policy for Higher Education Employees. Under this policy the spouse and dependent children of eligible employees will be provided tuition remission benefits throughout higher education.

We have made only one change in the document that was discussed at the Public College Presidents' meeting on May 17, 1984. In keeping with a suggestion made by President VanWinkle, we have defined the term "program" as used in I (C) and I (D) to include any program of study begun at a Community College and continued without interruption through the bachelor's degree at a State College or University.

Please use the enclosed Certificate of Eligibility in processing all requests for tuition remission from higher education employees. I ask your cooperation in informing employees at your campus of this new policy and in making copies of the Certificate of Eligibility available through the appropriate administrative offices. A notification of this policy will be sent to representatives of all bargaining units that have executed 1983-1986 agreements with the Regents.

Although this policy does not take effect formally until September 1, 1984, you should begin processing now requests for tuition remission applicable to courses or programs commencing on or after September 1.

The Regents' Office will be requesting from you periodic reports on the implementation of this policy. Therefore, you should instruct your staff to maintain detailed records on all tuition remission benefits used for study at your campus, including at least the following data, broken down according to State-supported and non-State-supported programs:

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- 1) the number of employees, spouses, and dependent children enrolled;
- 2) the bargaining unit (or non-unit) status of employees using tuition remission;
- 3) the home colleges/universities of tuition remission recipients;
- 4) the number enrolling in full-time programs;
- 5) the number enrolling in part-time programs and the average number of courses taken;
- 6) the dollar amount of tuition waived.

If you have any questions concerning the interpretation of this policy, please contact the Employee Relations Division of the Regents' Office at (617) 727-0687.

Enclosures

cc: Joseph M. Finnegan
Roger T. Schinness
Peter M. Mitchell
Carleton H. LaPorte, Jr.
Roy S. Milbury
James E. Samals
Institutional Bargaining Representatives
Personnel Directors

BOARD OF REGENTS OF HIGHER EDUCATION

SYSTEMWIDE TUITION REMISSION POLICY
FOR HIGHER EDUCATION EMPLOYEES

I. Eligibility

- A. All full-time professional and classified employees of a public college or university who are paid from the 01 or 02 Subsidiary Account, and who have completed at least six (6) months of service (or in the case of faculty, one academic semester) as of the date of enrollment, shall be eligible for systemwide tuition remission benefits.* Employees on paid leave of absence or industrial accident leave remain eligible during the period of any such leave. Employees on unpaid leave shall remain eligible for a maximum of one calendar year. Retired or former employees shall not be eligible; however, the spouse and dependent children of retired, former, or deceased employees may retain eligibility under certain conditions (see C, D, and E below).
- B. The spouse and dependent child or children of any eligible employee shall also be eligible for systemwide tuition remission benefits. A "dependent child" shall mean any natural, adopted or step child who is claimed as a dependent on the eligible employee's Federal Tax Return for the tax year immediately preceding enrollment. No employee's child beyond the age of twenty-five (25) shall be eligible for tuition remission; provided, however, that in exceptional circumstances and for good reason the President of the public college or university granting the tuition remission may waive this age limitation for an employee's child who continues to meet the IRS standards of dependency.
- C. If an eligible employee retires while a child or spouse is enrolled in a program of study or degree program, the spouse or child may complete such program with tuition remission, provided that enrollment is continuous.
- D. If an eligible employee who has completed at least five (5) years of full time equivalent service dies, the surviving spouse and children shall be eligible to enter and/or complete one full program of study or degree program with tuition remission. The term "program" as used in this Section D and the above Section C shall include, but not be limited to, any program of study begun at a Community College and continued without interruption through the bachelor's degree at a State College or University.

*Employees who are members of a bargaining unit which has not executed a collective bargaining agreement with the Regents for the period 1983-1986 shall become eligible for Systemwide Tuition Remission only upon execution of such an agreement. The actual effective date of Systemwide Tuition Remission for these employees shall be determined by the Chancellor.

- E. If an eligible employee leaves the employment of public higher education under conditions other than those described in C and D above while a spouse or child is enrolled in a course/program, the spouse or child may complete the semester already begun. At the end of the semester his/her eligibility for tuition remission terminates.

II. Applicability

Tuition remission shall be provided to eligible employees, their spouse and dependent children as follows:

- A. For enrollment in any state-supported course or program at the undergraduate or graduate level at any Community College, State College, or University excluding the M.D. Program at the University of Massachusetts Medical School, full tuition remission shall apply.
- B. For enrollment in any non-state-supported course or program offered through continuing education, including any community service course or program at any Community College, State College, or University, fifty percent (50%) tuition remission shall apply.
- C. Tuition remission shall apply to non-credit as well as credit-bearing courses.

III. Limitations

- A. Employees (or their spouse or dependent children) receiving tuition remission are responsible for the payment of all other educational costs, including fees (application, laboratory, etc.), books, and supplies.
- B. Employees (or their spouse or dependent children) must apply for admission and meet all admissions standards for the desired course/program.
- C. Admission to all courses/programs in continuing education is on a space-available basis. Further, each local campus administration reserves the right to cancel any continuing education course in which a minimum number of full tuition-paying students, as determined by the administration, has not enrolled.
- D. Tuition remission benefits are non-transferable.

IV. Certification Process

To qualify for tuition remission, an employee must take the following steps:

- A. Apply for, and be admitted to the desired course/program.
- B. Complete a "Certificate of Eligibility for Systemwide Tuition Remission" and have it signed by his/her Department Head or Supervisor and by the Chief Personnel Officer of the college or university at which he/she is employed. If the tuition remission is to be used by the employee's spouse or dependent child, the name and relationship of this individual should be indicated on the Certificate. The Certificate should be completed as far in advance of the date of enrollment as possible.
- C. Submit the completed Certificate of Eligibility with his/her tuition bill to the college or university at which he/she plans to enroll. The employee (or his/her spouse or dependent children) must remit payment at the same time for costs not covered by tuition remission.
- D. It is the responsibility of the employee to insure that the Certificate of Eligibility is approved in a timely fashion. Retroactive tuition rebates will not be made except in unusual circumstances beyond the control of the employee.

V. Effective Dates

This policy shall take effect on September 1, 1984 and shall apply to any course or program beginning on or after that date. It shall remain in effect until June 30, 1986.

VI. Continuation of Existing Benefits

The implementation of this policy shall not limit or preclude any tuition remission benefits currently enjoyed by higher education employees under the terms of applicable collective bargaining agreements or personnel policies.

VII. Interpretation of this Policy

The Chancellor or his designee shall have the sole authority to resolve any dispute concerning the interpretation and application of this policy. The Chancellor may amend or modify this policy from time to time as he deems appropriate and necessary.

No dispute or claim of benefits arising from this policy shall be the subject of a grievance or arbitration procedure.

Issued May 21, 1984

CERTIFICATE OF ELIGIBILITY FOR SYSTEMWIDE TUITION REMISSION

Higher Education Employees

Instructions: Before completing this form, please read carefully the Board of Regents' Systemwide Tuition Remission Policy for Higher Education Employees to determine whether you are eligible for tuition remission benefits. Then complete and sign the top section of this form, have it signed by your department head and by the Chief Personnel Officer of the College or University at which you are employed. Once approved by the Chief Personnel Officer, the Certificate will be returned to you. You must then submit it with your tuition bill to the Community College, State College, or University at which you are enrolled.

Employee's Name

Title and Department

Employee's College/University

Collective Bargaining Unit (If none, indicate "non-unit classified" or "non-unit professional")

Spouse Dependent Child

Name and Relationship of Individual Using Tuition Remission (if other than Employee)

Signature of Employee

Date

The individual named above is an employee of this College/University and meets all eligibility requirements for systemwide tuition remission.

Signature of Employee's Department Head

Signature of Chief Personnel Officer (or Designee)

Date

Date

Note: This Certificate is valid for 120 days after the date of signature by the Chief Personnel Officer. A new Certificate must be completed for each semester of study. This Certificate is not transferable.

BOARD OF REGENTS OF HIGHER EDUCATION

SYSTEMWIDE TUITION REMISSION POLICY

HIGHER EDUCATION EMPLOYEES

ADDENDUM (PART-TIME EMPLOYEES)

This Addendum to the Board of Regents' Systemwide Tuition Remission Policy describes the eligibility requirements and applicability of tuition remission benefits for certain part-time employees in higher education.

I. Eligibility

- A. All part-time employees who are members of a collective bargaining unit, who are paid from the 01 or 02 Subsidiary Account, and who have completed at least six months of full-time equivalent service as of the date of enrollment, shall be eligible for systemwide tuition remission benefits. No other part-time employees shall be eligible for systemwide tuition remission.
- B. The spouse and dependent child or children of any eligible part-time employee shall also be eligible for systemwide tuition benefits. The age limitation and IRS dependency standards set forth in the Regents' Systemwide Tuition Remission Policy shall apply to children of eligible part-time employees.

II. Applicability

Tuition remission shall be provided to eligible part-time employees, their spouse and dependent children as follows:

- A. For enrollment in any state-supported course or program at the undergraduate or graduate level at any Community College, State College, or University, excluding the M.D. Program at the University of Massachusetts Medical School, fifty percent (50%) tuition remission shall apply.
- B. For enrollment in any non-state-supported course or program offered through continuing education, including any community service course or program, at any Community College, State College, or University, twenty-five percent (25%) tuition remission shall apply.
- C. Tuition remission shall apply to non-credit as well as credit-bearing courses.

In all other respects, the provisions of the Regents' Systemwide Tuition Remission Policy shall be of application to eligible part-time employees.