

General Employment Policies

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General Employment Policies

A. Terms and Conditions of Employment

By accepting employment at Beloit College, an employee agrees to abide by the policies and rules of Beloit College, whether contained in this manual or otherwise. Beloit College reserves the right to change its policies, rules, procedures, and regulations at any time.

Beloit College reserves the right to take any necessary action to further the security of its campus and the safety of its employees, students, and guests.

B. Recruitment and Appointment

It is expected that those appointed to faculty or staff positions will support the goals and policies of Beloit College as published in the college Catalog, the Policy Manual, and other official announcements.

In support of the college's Equal Employment Opportunity/Affirmative Action Policy, all persons involved in the recruitment of faculty or staff shall cooperate in ensuring that hiring practices are non-discriminatory in nature and in providing documentary evidence that procedures in accordance with those disseminated through the Office of Human Resources have been followed. The appropriate Affirmative Action Officer shall be completely informed at all times of the procedures employed.

All college search processes for the employment of new faculty and staff shall include active pursuit of the candidacies of underrepresented minorities. Moreover, final approval of a candidate shall not be given unless underrepresented minorities were included in the list of finalists, or unless it can be demonstrated that every reasonable attempt was made to obtain the applications of qualified minority candidates. See Chapter IV, Section A, for the college's Equal Opportunity/Affirmative Action policy.

C. Background Check Policy

It is the policy of Beloit College to conduct background checks on all individuals hired into faculty and staff positions. Background checks are an important part of the selection process and are collected as a means of promoting a safe learning and working environment for current and future students, faculty, and staff, as well as to assist the college in determining a candidate's overall employability.

Beloit College will conduct a background check on a job candidate once a conditional offer of employment has been extended. For college purposes, the background check will focus on an individual's criminal record. The background check is not meant to be a substitute for

professional or personal reference checks or degree verification; these will be done separately by Human Resources or by the hiring supervisor in cooperation with Human Resources. Candidates will not begin to work until after the satisfactory completion of the verification of references, degree attainment, and criminal background.

The college will use a third-party agency to perform the background checks and will ensure that all checks are conducted in compliance with federal and state statutes, including the Fair Credit Reporting Act. The Fair Credit Reporting Act requires the college to inform a candidate of their rights under the Act and obtain a written authorization before requesting a background report. A candidate who refuses to provide written authorization will be disqualified from further consideration for employment.

The results of the background check will be kept strictly confidential. Information that is relevant to the employment of the individual will only be shared with a hiring supervisor and/or the appropriate vice president. A previous conviction does not automatically disqualify an individual from employment; Beloit College will comply with all applicable federal, state, and local laws and regulations regarding criminal convictions and the consideration thereof in employment. A candidate who attempts to withhold or falsify information during the application process will be disqualified from employment. If an employment offer is withdrawn on the basis of the results of a criminal background check, Beloit College will inform the candidate that it plans to take adverse action, inform the candidate of their rights, provide the candidate with a copy of the report, and allow the candidate to dispute inaccurate information.

D. Employment of Relatives

Beloit College permits the employment of relatives of employees, subject to the following conditions:

1. Employment of immediate family members in a supervisor/subordinate relationship is prohibited.
2. Members of an immediate family ordinarily will not be employed in the same department. If employees in the same department marry, one of them may be transferred to another department as soon as practicable.

An immediate family shall consist of spouses or domestic partners and the following individuals related by blood or marriage: mother, father, son, daughter, brother, sister, grandmother, grandfather, sister-in-law, brother-in-law, mother-in-law, father-in-law, or any other relative living in the same household as the employee.

E. Attendance at Official Institutional Occasions

Except when excused in writing by the president or provost, every member of the full-time faculty and administrative staff shall attend designated special convocations, commencement exercises, and other official occasions occurring in any term during which the individual is in

residence. Academic regalia is to be worn by members of the faculty and administration on designated official occasions.

F. Classification of Employees for Purposes of Benefits Eligibility

Beloit College classifies hourly and administrative support staff employees into one of several categories at the time of employment. Categories are based on the expected duration of the specific job and on the work schedule involved. If an employee changes jobs or the work schedule is altered, reclassification, if necessary, will be made on the date such change is effective. The categories and definitions of each are:

1. Full-Time or Half-Time

Full-time employees work a schedule of hours ranging from 1,950 to 2,080 per year, over 12 months, in a position that will continue for at least one year. Half-time employees work a schedule of more than 1,000 annual hours but less than full-time, over 9, 10, 11 or 12 months, in a position that will continue for at least one year. Such employees are entitled to full or pro-rated fringe benefits and paid leaves.

Full-time hourly staff work schedules that vary depending upon department and position. Many clerical staff work annual schedules of 37.5 hours per week (7.5 hours per day). Other staff, including those in physical plant, security and technical positions, work annual schedules of 40 hours per week (8 – 10 hours per day).

Half-time hourly staff working at least 1,000 hours per year, but less than full-time, are typically assigned a weekly and annual work schedule based upon the position workload requirements. This may include scheduled unpaid time off during semester breaks or summer months.

Full-time administrative staff work schedules based on a 40-hour work week.

Half-time administrative staff are typically assigned a weekly and annual work schedule based upon the position workload requirements. This may include scheduled unpaid time off during semester breaks or summer months.

2. Part-Time

Regular, part-time staff work a continuous schedule of at least 15 hours per week, but less than 1,000 hours per year, during the academic or fiscal year. Such employees will be entitled to pro-rated holiday, PTO, Sick Bank Leave, jury duty and bereavement benefits.

3. Temporary or Casual

Temporary or casual employees work either full- or part-time schedules for a period of employment that typically does not exceed six months. Temporary or casual employees may be hired for ongoing positions scheduled only several hours per week, special or seasonal assignments, or to fill-in during the extended absence of a regular full- or part-time employee.

Temporary or casual employees are not eligible for fringe benefits or paid leaves, except as required by law.

G. Insurance Coverage

All employees are covered by Social Security (FICA), Workers' Compensation Insurance, and Unemployment Compensation. Beloit College pays the full cost of these programs, except for Social Security, which also requires contribution by the employee.

Half- to full-time employees (those working 1,000 hours or more per year) are also eligible for additional insurance coverage. Beloit College reserves the right to change, suspend, or terminate any or all terms of the plans or a particular plan at any time.

This manual provides only a list of the plans available. Summary plan descriptions including detailed information about the plans are distributed and explained to all new employees during their sign-in session with Human Resources. Requests for additional copies of the summary plan descriptions or questions regarding these programs should be directed to the Human Resources Office. These programs include:

1. Life and Long Term Disability
 - a. Life Insurance:
 - i. Employee coverage (college pays premium)
 - ii. Dependent coverage (Employee pays premium)
 - iii. Travel Accident Insurance (Employee pays premium)
 - b. Long Term Disability (LTD) insurance (college pays premium after one year of eligible employment)
2. Health Plans
 - a. Health Benefit Plan (college and employee share costs)
 - b. Dental Insurance (college and employee share costs)
 - c. Vision Insurance (Employee pays premium)
 - d. Section 125 Flexible Spending Plan (Employee pay contributions)

The option for enrollment in the health plans listed above normally occurs at the time of employment, with the option for enrollment, reenrollment or cancellation at the beginning of each calendar year, though certain life status changes may allow employees to qualify for enrollment during the year.

Open Enrollment — Employees who have previously waived coverage for themselves and/or eligible dependents may enroll in December of each year in any of these plans with coverage effective January 1. This includes changing coverage to include eligible family members not currently covered. Employees will be asked to provide a certificate of continuous health care coverage from the current insurance provider, and pre-existing condition limitations may apply if they have not had previous continuous coverage.

Special Enrollment — Employees who previously waived or terminated coverage for themselves and/or eligible dependents because of other insurance coverage may be able to enroll if that coverage ends. Special enrollment or change in coverage to include a dependent or dependents must be requested within 30 days of the qualifying event. If the change or enrollment does not occur within 30 days of the qualifying event, the next opportunity for enrollment will be the open enrollment period. Qualifying events allowing for special enrollment include:

- Acquiring new dependents through marriage, birth, adoption, placement for adoption, or court order.
- Loss of eligibility for other coverage due to legal separation, divorce, death, termination of employment or reduction in the number of hours of employment, or exhaustion of extended coverage related to these events.
- COBRA coverage under another plan has been exhausted.
- Employer contributions under the other plan have been terminated.

Termination of Coverage — Terminating health, dental, or vision insurance coverage during the calendar year may be restricted due to the laws governing the Section 125 pre-tax deduction of premiums. Termination may also include changing from a family or limited family plan to a limited family or single plan to reduce the number of dependents covered. The IRS allows termination or change of coverage for qualifying events that change in family or life status, such as:

- Loss of dependent coverage due to legal separation, divorce, death, or a child's loss of eligibility due to age or dependent status.
- An employment status change for you or your spouse.
- Entitlement to Medicare or Medicaid.
- Significant change in premium cost.
- To satisfy provisions of a court order

H. Retirement Program

Employees are encouraged to consult with the Human Resources Office regarding the college's retirement plan and other benefit options that pertain to retirement. Faculty members who are planning to retire must also consult with the provost. Employees who plan to retire are expected to notify their department head or supervisor in writing at least three months in advance of the anticipated retirement date, and send a copy of the notice to the Human Resources Office. Upon retirement staff will be paid for all unused accrued PTO time.

1. Retirement Plan Benefit

The college provides a defined contribution retirement plan for all full-time employees. Teacher's Insurance and Annuity Association and College Retirement Equity Fund (TIAA-CREF) is the retirement program administrator.

2. Eligibility and Enrollment

Full-time employees become active members in the retirement plan on the first day of the month in which they first meet all the eligibility requirements. Notification of participation and enrollment forms will be sent to employees prior to the first monthly contribution. Eligibility requirements include:

- a. Must have two years of eligible service which includes 1,000 or more hours of service each year,
- b. Must have attained age 21, and
- c. Must complete and submit the appropriate enrollment form.

The college will make a monthly contribution for employees who are participants in the plan. The amount of each contribution will be equal to a percentage of the monthly wages or base salary for the preceding month. This percentage is based on years of service and is determined from the following schedule:

- Two years but less than six years of service 3.5%
- Six years of service and thereafter 7%

3. Supplemental Retirement Plan

All employees have the option of saving for retirement in 403(b) tax sheltered annuity plans through payroll deduction. Voluntary contributions must be made by payroll deduction into an approved 403(b) tax sheltered annuity plan. The Human Resources or Payroll Office can provide information about contribution limits and a list of 403(b) vendors currently being used by employees.

4. Staff Retirement Planning Program

The Staff Retirement Planning Program is designed to assist individual staff members as they consider the important decisions involved in retirement and to provide long-serving members of the campus community with separation benefits that might help to ease the transition. The program allows individuals to think about their personal short- and long-term objectives and about shifting their daily schedule from full-time work to a more relaxed pace. Retirement planning also provides an opportunity for the college to prepare for the transfer of the knowledge, skills and institutional memory of long-term valued staff members. Since individual circumstances vary, the opportunities and benefits offered in this program are loosely defined and allow for individual and institutional flexibility.

Eligibility and Availability: Full-time staff members who have reached the minimum age of 55 and have completed a minimum of 10 years of continuous service at Beloit College are eligible. Requests to participate in the program must be voluntarily initiated by the staff member. Administration of the program is the responsibility of the requesting staff member's senior staff supervisor and Human Resources. Participation in the program may be denied if there are more requests than can reasonably be accommodated by the college's financial and operational requirements. Inquiries about the program may be directed to Human Resources or departmental supervisors.

Individualized Approach: Staff approaching retirement may request consideration for assignment to a special administrative project with a reduction in hours and prorated wages or salary. The specific nature of the employment responsibilities will be determined by the department supervisor in consultation with the employee's respective senior staff supervisor and Human Resources. Depending upon the needs of the department and the circumstances of the individual, schedules may be part-time or greater with some benefits eligibility.

Staff members planning for retirement may request consideration for other separation benefits. This document does not describe all possible models that could be offered, but options may include:

- For staff who have participated in the college's health plan for at least three years, access to continued participation in the plan for up to three years or until eligible for Medicare, whichever comes first.
- A severance amount paid as earnings and representing a portion of an individual's current compensation. Eligible staff members may receive the value of this severance amount in the form of a contribution by Beloit College for continuing health care under the college's health plan.
- Access to financial planning services and counseling regarding health care options.
- Miscellaneous benefits, such as sports center use and allowable computer purchase discounts.

The college will review the program at least every 5 years and reserves the right to discontinue it with reasonable notice. If the college elects to discontinue the program, staff will be notified and any existing written agreements will be honored.

5. Retirement Options for Faculty

Retirement options for faculty are intended to assist long-serving members of the faculty as they consider the important decisions involved in retirement and to provide them with resources that may help ease that transition. Since individual circumstances vary, the opportunities and benefits offered in this program seek to preserve individual and institutional flexibility. Individuals who do not fall distinctly into the categories described in sections a and b below should consult with the provost or the director of Human Resources regarding other possible arrangements.

a. Phased Retirement Option for Tenured Faculty

The Phased Retirement Option (PRO) is designed to assist individual faculty members and the programs in which they participate in planning for the full retirement of a long-serving member of the college community. Such planning may provide an opportunity for the college to prepare for the transfer of the knowledge, skills, and institutional memory as well as allow faculty members to consider and pursue their long and short-term goals as they transition from full-time employment to retirement.

Eligibility. Full-time tenured faculty members are eligible to participate voluntarily in the Phased Retirement Option after reaching the age of 59 and completing 20 years of continuous service at Beloit College. From 2011 to 2016, PRO is open to any full-time tenured faculty member over 59 who has 20 years of continuous service at Beloit College. In following years, full-time tenured faculty members between the ages of 59 and 62 who have 20 years of continuous service at the college will be eligible to initiate participation in PRO.

Faculty members electing phased retirement must notify the college and their departments or programs by December prior to the academic year in which they plan to begin PRO. When formally entering into the Phased Retirement Option, the tenured faculty member will indicate a firm date for their full retirement and will sign a letter of agreement to resign tenure, effective on that date. Upon reaching full retirement, a faculty member electing this option will be eligible for consideration for promotion to emeritus status.

Provisions. PRO carries a 50% employment expectation, with compensation based on the number of years the faculty member elects to remain in the program. Faculty who choose to participate for one year in PRO will receive 60% of their last full-time salary, including the base percentage increment approved by the board of trustees, and an enhanced research catalyst fund (taxable); faculty participating for two years will receive 55% of their last full-time salary, including the base percentage increments approved by the board of trustees; faculty who commit to three years in PRO will receive 50% of their last full-time salary, including the base percentage increments approved by the board of trustees. With one semester's notice, an individual participating in this plan may shift to full retirement prior to the completion of three years, and their salary will be prorated accordingly.

Faculty may take any earned sabbatical leave immediately prior to entering the PRO; teaching during the PRO will not count toward future sabbatical leaves.

The specific nature of the employment responsibilities for faculty in the PRO program will be determined by the provost in consultation with the individual faculty member and the faculty member's department or program. These responsibilities may include (but will not be limited to) regular teaching, supervision of special projects, advising, and/or administrative assignments.

Benefits. Faculty members electing the Phased Retirement Option will retain all employee benefit options provided by the college. Those related to salary (such as contributions to the Regular Retirement Plan administered by TIAA-CREF) will be based on actual salary paid.

Availability. The Phased Retirement Option is a program for faculty members who meet the eligibility requirements. Beloit College elects to offer this program to allow faculty members who have served the institution to plan their next steps and to facilitate planning on the part of departments and programs in which vacancies will occur. Requests to participate in PRO may be denied if: 1) the provost determines that participation by the faculty member would seriously disrupt an academic department, or college operations and/or programs; or 2) the provost has received more applications for participation in the program than can reasonably be approved in light of the college's financial and operational requirements.

The college will, at least in five-year intervals, review the program to determine if the needs of the institution are being fulfilled, and the college reserves the right to discontinue the program if those needs are not being met. If the college elects to discontinue the program, the faculty will be notified at least two years in advance in order to provide sufficient time for planning and any existing written agreements will be honored.

b. **Early Retirement Options for Tenured Faculty**

Early Retirement Options (EROs) are designed to allow faculty members to retire sooner than they otherwise might in order to pursue other professional or personal interests or to meet other needs.

Eligibility. Full-time tenured faculty members who will reach the minimum age of 55 in the calendar year in which they plan to retire and have completed 10 years of continuous service at Beloit College are eligible to participate voluntarily in Early Retirement Options. Faculty members electing this option will be eligible for consideration for promotion to emeritus status.

Provisions. Faculty members meeting the Early Retirement Options criteria may select from the following mutually exclusive packages:

- i. Subject to the usual approval process of sabbatical leave, a full-year sabbatical with full pay and benefits, with no obligation to return to teach following the leave.
- ii. For faculty members who have participated in the college's health plan for at least three years, continued college contributions to that plan for up to three years. A part of the college's contributions may be considered taxable income.

All faculty members participating in EROs will have access to financial planning services and counseling regarding health care options.

Availability. The Early Retirement Options are available to faculty members who meet the eligibility requirements. The college will, at least in five-year intervals, review the program to determine if the needs of the institution are being fulfilled, and the college reserves the right to discontinue the program if those needs are not being met. If the college elects to discontinue the program, the faculty will be notified at least two years in advance in order to provide sufficient time for planning, and any existing written agreements will be honored.

c. Other Faculty Retirement Arrangements

Recognizing that the needs and desires of each individual and the college in particular cases may differ, other pre-retirement arrangements may be made with a faculty member if it serves the mutual interests of that faculty member and the college.

Additionally, in their final year of college service prior to retirement, all full-time faculty members who have taught at Beloit for at least 20 years are eligible for the following:

- i. **Catalyst Funds:** In addition to regular PPDC funding, funds will be made available for exploration of post-retirement research opportunities. Plans shall be approved by the provost.
- ii. **Recognition Funds:** Up to a set amount, funds will be made available for the support of a public celebration of the faculty member's accomplishments with colleagues, students, and alumni. Plans shall be approved by the provost.

A retired faculty member receives the benefits of emeriti professors at Beloit, such as library privileges, including interlibrary and reference service, a Beloit College e-mail account, sports center use, and computer purchase discounts, as available.

For at least three years after a retiring faculty member stops teaching, they will remain eligible for a set amount of nontaxable professional development funding through the office of the provost.

For at least three years after a retiree ceases teaching, if the retiree plans to remain professionally active and to work regularly on campus, the retiree may request the use of

office space, which may be shared, including a desk, computer with Internet connection, and phone. Toward the end of the second year of this three-year period the provost will review the retiree's recent use of the office and the level of professional activity and the retiree's projected future needs to determine whether the arrangement should be renewed. The college will seek to minimize the number of office moves that are required of a retiree but cannot assure that the office assignment after retirement will be the same from year to year.

I. Faculty and Staff Emeritus Designation

When members of the faculty or administrative staff who have rendered long and distinguished service to the college retire, the board of trustees may authorize the conferring of emeritus rank on those individuals. In authorizing honorary emeritus designations, the board will take into consideration recommendations from the president, the provost, the Faculty Status and Performance Committee, and other appropriate bodies and individuals. Emeritus awards are normally announced at a recognition event held in the Spring with the presentation of citations of recognition to the individuals so honored.

J. Domestic Partners' Benefits

Benefits comparable to the benefits available to spouses of married Beloit College employees will be available to the qualifying same-sex domestic partners of Beloit College employees.

Benefits will be available to only one domestic partner per employee.

1. Definitions and Inclusions

For the purposes of this policy, the college defines the "domestic partner" of an employee as the only adult individual (i.e., age 18 or older) who:

- a. lives with the employee, has done so for at least six consecutive months (unless constraints due to employment have prevented them from sharing a common residence), and intends to do so indefinitely, and
- b. is not related by blood to the employee, and
- c. is competent to consent to a contract, and
- d. is jointly responsible with the employee for their common welfare and shares financial obligations with the employee (normally, this joint responsibility will be demonstrated by joint mortgage, joint ownership, joint lease, or joint rental agreement for the primary place of their residence), and
- e. meets at least one of the following requirements:

- i. designation as a primary beneficiary for the employee's life insurance and retirement benefits, or
 - ii. designation as a primary beneficiary in the employee's will, or
 - iii. designation of employee to act for the domestic partner under durable property and health care power of attorney, or
 - iv. ownership of a joint bank account or credit card account for substantial assets.
- f. Under certain circumstances, the college may also provide benefits for the child of a domestic partner. For the child to be eligible for such benefits, all of the following conditions must apply:
- i. the child is primarily dependent upon the employee and domestic partner for financial support, including debts incurred by the child, or the domestic partner is mandated by contract or legal ruling to provide financial support, and
 - ii. the child is unmarried, resides in the same household as the employee and domestic partner, and is 19 years of age or less or a full-time student and 24 years of age or less, and
 - iii. the employee and domestic partner assume parental responsibility for the child, including debts incurred by the child, and
 - iv. the child was claimed by the employee as a dependent on the employee's federal income tax return for the prior year and the employee intends to claim the child as a dependent for the current year and any subsequent years in which the child meets the above qualifications.

The college will require a Statement of Domestic Partnership, available in the Human Resources Office, signed by both domestic partners applying for benefits and may, at its sole discretion, require additional proof that they meet the specified requirements. Denial of eligibility for these benefits may be appealed to a committee comprised of the provost and the vice president for administration, those being the senior officers of the college with administrative responsibilities for faculty and staff members. A decision by this committee may be appealed to the president, whose ruling will be final.

Employees with domestic partners receiving benefits under this program are required to notify the college in writing if those requirements by which they certified the existence of a domestic partnership are no longer met. As part of that notification, the employee must complete and submit to the college a "Termination of Domestic Partnership" notification form, available in the Human Resources Office, as soon as reasonably possible upon the termination of the domestic partnership and must also send a copy of that form to the former domestic partner. Failure to so notify, or falsely certifying eligibility, may result in disciplinary action including termination of

employment and reimbursement to the college for any costs incurred by it in providing benefit coverage.

2. Conditions and Exclusions

This program is intended to benefit active employees of Beloit College who elect and qualify for participation. The college has no direct obligation to the domestic partner of a college employee or to the employee's dependents. Eligibility for active employees ends upon termination of employment, regardless of the reason for termination.

Domestic partner benefits are not available to an employee with a legal spouse who is eligible to be covered under any of these benefit plans.

Any tax liability on domestic partner benefits is the responsibility of the employee. The college will comply with applicable federal and state withholding and reporting requirements.

While this program is intended to continue indefinitely, the college reserves the right to modify or discontinue it at any time.

3. Covered Benefits

Domestic partners and qualified dependents are provided the following benefits to the extent feasible and allowable by law, so long as the domestic partnership is in force, or, with respect to dependents, so long as the dependent relationship as defined above exists.

- a. **Life Insurance, Long-Term Disability Insurance, and Retirement Benefits**
Employees have complete discretion to identify the beneficiaries to receive death benefits under the college's life insurance coverage. Long-term disability insurance is paid directly to employees of Beloit College; a domestic partner has no right to, or claim against, Beloit College for these benefits. The employee has the right to designate anyone as beneficiary of death benefits, or as a joint survivor (second annuitant) under Beloit College's retirement benefits. *[N.B.: Because this plan is subject to the Employment Retirement Income Security Act of 1974 (ERISA), former spouses of employees or retirees who were previously married and are living with a domestic partner may have the right to benefits under a pension plan to the extent required by a qualified domestic relations order.]*
- b. **Medical and Dental Insurance**
Beloit College insurers for group health insurance and group dental insurance will voluntarily provide benefits to domestic partners, although they are not required to do so by Wisconsin law. The employee will purchase a "Limited Family" insurance contract or, in the case of dependents, a "Family" contract. In this case the domestic partner and/or dependents will be treated in a manner consistent with the treatment of legally married employees and spouses and/or dependents. The excess value of any insurance coverage may be taxable, as more fully described below. *[N.B.: Federal COBRA provisions for continuation of medical insurance coverage after termination of*

*employment do **not** apply to domestic partners and/or dependents.]*

- c. **Campus Facilities**
Domestic partners of Beloit College employees are entitled to the same access to the Sports Center and the same user privileges in the Morse Library available to spouses of college employees.
 - d. **Family and Bereavement Leave**
A domestic partner will be considered a member of the employee's immediate family for purposes of determining the employee's eligibility for family or bereavement leave under college policies.
 - e. **Tuition Remission and Tuition Exchange**
Domestic partners of Beloit College employees are eligible for the same tuition remission benefits available to spouses of Beloit College employees. The dependent children of Beloit College employees and their domestic partners, who meet the qualifications under "Definitions and Inclusions" above, are eligible for the same tuition remission and tuition exchange benefits available to dependents of Beloit College employees.
4. **Tax Information**

Any excess value of medical and dental insurance for domestic partners may be taxable unless the domestic partner is a dependent of the employee as defined in the Internal Revenue Code. To receive a tax exemption for such payments, an employee must provide the college with a tax certification of dependency and a copy of the employee's federal tax return for the preceding year.

The college urges employees to consult their tax advisors to determine whether they may claim domestic partners or the children of domestic partners as dependents for tax purposes.

K. Family and Medical Leave Act (FMLA) Policy

Beloit College recognizes that employees may require extended time off from work in the event of serious illness or injury or to care for an ill or injured child, parent, spouse, or domestic partner. As described in the policy below, Beloit College provides FMLA leave in accordance with the federal Family and Medical Leave Act (FFMLA) and Wisconsin Family and Medical Leave Act (WFMLA). This policy outlines Beloit College's administration of its FMLA program. If, after having reviewed the policy, you have questions about your rights and responsibilities under the FFMLA, WFMLA, or this policy, please contact Human Resources.

1. **Applying for FMLA Leave and the Amount of Leave Available**
 - a. **How Do I Request Leave?**
While an employee does not have to use magic words when asking for FMLA leave, an employee must provide sufficient information for the college to determine if the absence may qualify for FMLA protection and the anticipated timing and duration of the leave.

Sufficient information may include that, because of a serious health condition, the employee is unable to perform job functions, a family member is unable to perform daily activities, or the employee or family member require hospitalization or continuing treatment. Sufficient information may also include circumstances supporting the need for military family leave. The college may then collect other information from the employee to properly determine whether the absence will be treated as FMLA leave. In all instances, Beloit College will require an eligible employee to submit a completed Family and Medical Leave Request Form to Human Resources. The forms are available in Human Resources.

If the employee is seeking leave for an FMLA-qualifying reason for which the college has previously provided FMLA-protected leave, the employee must specifically refer to the qualifying reason for leave or the need for FMLA leave which has been previously taken or certified. Failure to do so may result in the delay or denial of FMLA approved leave.

b. Who is Eligible for FMLA Leave?

- i. *FFMLA*. To be eligible for FFMLA, you must: (1) have been employed by Beloit College for at least 12 months (whether consecutively or not); (2) have worked at least 1,250 hours during the 12-month period immediately preceding the commencement of the requested leave; and (3) be employed at a work site where 50 or more employees are employed by the college within a 75-mile radius. You may not count periods of employment preceding a 7-year break in service towards your 12 months of employment with the college unless the break in service was due to National Guard service or Reserve Military service, or where otherwise provided under written agreement.
- ii. *WFMLA*. To be eligible for WFMLA, you must have been employed by Beloit college for more than 52 consecutive weeks and have been compensated for at least 1,000 hours during the 52 weeks immediately preceding the commencement of the leave.

Beloit College Human Resources will inform employees requesting leave whether they meet the basic eligibility requirements for FMLA leave. At the same time, Human Resources will inform the employee of any additional information required to verify that the need for leave is for a FMLA-qualifying reason and employee's rights and responsibilities.

c. What Types of Leave are Covered?

- i. *FFMLA*. Generally, Beloit College will recognize FFMLA protection for eligible employees for up to a total of 12 weeks of unpaid leave in a 12-month period for one or any combination of the following reasons:

- (a) For the birth of an employee's child or for the placement of a child with the employee for adoption or foster care;¹
- (b) To care for a child, spouse, domestic partner, or parent suffering from a serious health condition;
- (c) For an employee's own serious health condition; or
- (d) To address a qualifying exigency arising out of an employee's spouse's, child's or parent's active duty or call to active duty in support of a contingency operation. However, the FFMLA does not provide for a full 12 weeks of leave for all types of qualifying exigencies.

Further, employees may take up to 26 weeks unpaid leave to care for the employee's spouse, child, parent, or next of kin who is a covered service-member that incurs a serious illness or injury while in the line of duty on active duty. A covered service-member includes current members of the armed forces. This leave is available only during a single 12-month period and is available on a per-covered service-member, per-injury basis. In certain instances, this leave may be combined with all other FMLA leaves, limiting the employee's FMLA leave entitlement for all purposes to no more than a total of 26 weeks of leave during the single 12-month period.

- ii. *WFMLA*. Generally, Beloit College will recognize WFMLA protection for eligible employees for the following unpaid leaves in a calendar year:
 - (a) Up to 6 weeks of leave for the birth or adoption of a child;²
 - (b). Up to 2 weeks of leave to care for a child, spouse, domestic partner, parent, or parent-in-law (including a domestic partner's parent) suffering from a serious health condition; or
 - (c) Up to 2 weeks of leave for an employee to care for their own serious health condition.

The specific requirements for each type of leave are discussed below.

What if Spouses Seeking Leave Both Work for Beloit College?

Unless WFMLA leave protections apply, spouses who both work for Beloit College and who take FFMLA leave for the birth of a child, because of the placement of a child for adoption or foster care, or to care for a parent may take a combined total of 12 weeks of FFMLA leave in a 12-month period.

¹ Such leave must generally be completed within 12 months of the birth or placement.

² An employee is not entitled to family leave that commences earlier than 16 weeks before the estimated birth or placement for adoption or foster care or commences later than 16 weeks after the actual birth or placement.

Spouses who both work for Beloit College and who take FFMLA leave to care for a covered service-member are entitled to a combined total of 26 weeks of unpaid FFMLA leave in a single 12-month period.

How Much Advance Notice of the Need for Leave Must I Provide?

Generally, where the need for leave is foreseeable, notice must be provided to Beloit College at least 30 days in advance. When 30 days advance notice is not possible or when the need for leave is unforeseeable, notice must be provided as soon as practicable. Notice of leave for a qualifying exigency must be provided as soon as practicable, regardless of how far in advance such leave is foreseeable.

What if I am Eligible for More Than One Form of Leave?

FMLA leave taken under this Policy may be covered by federal law, state law, or both. Employees will be required to use any and all leave entitlements simultaneously to the extent permitted by law.

2. Establishing a Qualifying Reason for FMLA Leave

What is a Serious Health Condition?

A serious health condition is an illness, injury, impairment, or physical or mental condition that involves inpatient care at a hospital, hospice, or residential medical care facility or “continuing treatment” by a health care provider.

In general, a serious health condition involving “continuing treatment” by a health care provider includes any one of the following: (1) incapacity and treatment; (2) pregnancy or prenatal care; (3) chronic conditions; (4) permanent or long-term conditions; and (5) conditions requiring multiple treatments. Subject to certain conditions, treatment means at least 2 visits to a health care provider or 1 visit and a regimen of continuing treatment.

Employees with questions about whether a medical condition is a serious health condition are encouraged to consult with Human Resources.

What is Leave to Care for a Covered Service-member with a Serious Illness or Injury?

This leave is to care for the service-member who incurs an illness or injury in the line of duty on active duty that renders the service-member medically unfit to perform the duties of their office, grade, rank, or rating (a “covered service-member”). This leave is available only to the service-member’s spouse, children parents, or certain next of kin. The covered service-member must have become injured or ill in the line of duty on active duty and must be: (1) undergoing medical treatment, recuperation, or therapy; (2) otherwise in outpatient status; or (3) otherwise on the temporary disability list. Individuals on the military’s permanent disability retired list are not covered service-members.

What is a Qualifying Exigency?

Qualifying exigencies include one or more of the following: (1) short notice deployment; (2) military events and related activities; (3) childcare and school activities; (4) financial

and legal arrangements; (5) counseling; (6) rest and recuperation; (7) post-deployment activities; and/or (8) such additional activities agreed to in advance by Beloit College. There are limits on the amount of leave available for a particular qualifying exigency and such limits may be less than 12 weeks. For more information on the maximum amount of leave available for a particular qualifying exigency, please contact Human Resources.

Leave for a qualifying exigency is limited to employees who are the spouse, son, daughter, or parent of certain members the military reserves, National Guard, or retired members of the regular armed forces who are on active duty or call to active duty status in support of a contingency operation. An employee whose family member is a member of the regular armed forces is not eligible to take leave because of a qualifying exigency.

How Do I Establish a Serious Health Condition or a Serious Illness or Injury?

Beloit College requires employees to submit a completed health care provider certification form when requesting family and medical leave for a serious health condition or for the serious illness or injury of a service-member. Certification Forms are available in Human Resources. The specific form required will depend upon the reason for the leave request; however, it will be one of the following:

- Certification of Health Care Provider for Employee's Serious Health Condition
- Certification of Health Care Provider for Family Member's Serious Health Condition
- Certification for Serious Injury or Illness of Covered Service-member for Military Family Leave

Regardless of the reason for the medical leave, the form must be completed by the treating health care provider (or in the case of a serious illness or injury of a service-member, an authorized health care provider). An employee must return the certification form to Human Resources within 15 calendar days after the date of the college's request. If an employee cannot comply with this deadline, the employee must contact Human Resources and request an extension prior to the date the form is due. An employee's failure to timely return the form and/or request an extension may result in the denial of the employee's FMLA leave request.

Once the certification is complete and sufficient, Beloit College may contact the health care provider to verify that the information contained in the certification was completed and/or authorized by the health care provider who signed the document and/or to understand handwriting on the medical certification or to understand the meaning of a response. Beloit College will use a health care provider, a human resources professional, a leave administrator, or a management official of the college. The employee's direct supervisor will not communicate with the health care provider. FMLA forms include a HIPAA authorization form permitting this communication, if necessary. This authorization also permits the health care provider to send the information directly to the college's FMLA Administrator so the employee does not have to.

If Beloit College requires clarification of the certification but: (1) the college is unable to obtain this clarification from the employee; and (2) the employee has not provided HIPAA authorization; then the college may deny FMLA protection for the leave.

Additional Provisions Specific to Establishing a Serious Health Condition of the Employee or Employee's Family Member

Beloit College has the right to ask for a second opinion, and perhaps third opinions, at its discretion. Employees may also be required to provide a periodic recertification supporting the need for leave.

How Do I Establish a Qualifying Exigency Due to a Family Member's Active Duty or Call to Active Duty Status?

Beloit College requires employees to submit a completed Certification of Qualifying Exigency For Military Family Leave form to Human Resources when requesting FMLA leave because of a qualifying exigency. This certification form is available in Human Resources.

The form must be completed by the employee. Employees must return the certificate within 15 days of the date of the college's request. If an employee cannot comply with this deadline, they must contact Human Resources and request an extension prior to the date the form was originally due. An employee's failure to timely return the form and/or request an extension may result in the denial of the employee's FMLA leave request.

3. Designation of FMLA Leave

How Do I Know if FMLA Leave Has Been Approved?

Beloit College will inform employees if leave will be designated as FMLA-protected and the amount of leave counted against the employee's leave entitlement. If the college determines that the leave is not FMLA-protected, it will notify the employee of that determination. In all instances, Beloit College determines whether to designate an absence as FMLA leave. Even where the employee does not request FMLA leave and/or does not submit the documents or other supporting information normally required, Beloit College may waive the requirement that such forms or information be submitted, and it may designate an absence as FMLA leave if the college determines that the absence is protected by FFMLA or WFMLA.

4. Rights While on FMLA Leave

Do I Have to Take Leave on a Continuous Basis?

Intermittent leave or reduced schedule leave will be permitted when it is medically necessary and in the case of qualified exigencies.

Intermittent leave and reduced schedule leave for planned medical treatment should be scheduled with minimal disruption to the college's operations. If practicable, medical appointments and treatment related to a serious health condition or a covered service-

member's serious illness or injury must be scheduled outside of working hours or at such times as allow for a minimal amount of time away from work.

The college may, in some cases, temporarily transfer or reassign an employee taking intermittent or reduced schedule leave to an available alternative position which better accommodates recurring periods of leave than does the employee's regular position. The alternative position will provide equivalent pay and benefits of the employee's regular position.

Will I Be Paid During My FMLA Leave?

Under the federal FMLA, the employee may substitute or the college may require that the employee substitute accrued, unused PTO, Sick Bank, or Paternal Leave as long as the employee meets any applicable requirements or conditions of use such paid leave under these policies.

Under the WFMLA, an employee is also entitled to substitute, for any leave requested under the WFMLA, any other unused paid leave which has accrued to the employee. However, the college may not require substitution while the employee is taking leave under the WFMLA.

As appropriate, employees on medical leave (for the employee's own serious health condition) may simultaneously be eligible for and receive disability or workers' compensation benefits. In such cases, disability and workers' compensation leave of absences will run concurrently with the FFMLA and WFMLA.

Will My Benefits Continue During My FMLA Leave?

During a leave taken under the WFMLA or FFMLA, Beloit College will provide group health insurance coverage in the same manner as if the employee continued working ("group health insurance coverage" means the entire health insurance package offered by the college, including medical, dental and vision insurance). Employees are required to make the same contributions toward such insurance as they would have if they continued working. Therefore, employees will be required to make the employee's normal employee contribution for group health coverage while on FMLA leave.

To the extent an employee receives pay from the college while on leave the employee's contribution amount will continue to be deducted from the employee's paycheck. During any period for which the employee's leave is unpaid, the employee must make arrangements to pay the employee's contributions. Failure to pay the employee contribution within the designated grace period may result in cancellation of coverage.

Employees will be notified prior to cancellation of benefits for non-payment. At its option, Beloit College may pay the employee's share of the premiums during FMLA leave, and recover these payments from the employee upon the employee's return to work. Upon return to work within the FMLA-protected leave period, the employee's health coverage will be reinstated on a prospective basis without penalty. If an employee fails to return to work for reasons other than those beyond the employee's control, the

college may recover from the employee the entire cost of the coverage provided during the unpaid leave. Other Beloit College benefits may be continued in the same manner.

Use of FMLA leave will not result in the loss of any employment benefit that accrued to an employee prior to the start of an employee's FMLA leave.

5. Returning to Work

What Happens When I No Longer Require Leave and Am Able to Return to Work?

Assuming the employee is returning to work prior to the expiration of their FMLA leave, the employee will be returned to the employee's former position or, if the position is filled, to equivalent employment with Beloit College. However, an employee may be denied reinstatement if the employee would not otherwise have been employed at the time reinstatement is requested.

Employees who were on leave to care for their own serious health condition must provide a Fitness For Duty Certificate to Human Resources before the employee may return to work. The Fitness For Duty Certificate requires the health care provider to address the employee's ability to perform the duties and physical requirements of their job, but only with regard to the particular health condition that caused the employee's need for FMLA. Failure to provide a Fitness For Duty Certificate may result in the delay or denial of job restoration. Fitness For Duty Certificates are available at Human Resources.

What If My Status Changes or I Want to Come Back to Work Earlier than Anticipated?

While on leave, employees are required to report periodically to Human Resources regarding their status and their intent to return to work. Any changes in status that would affect their estimated return to work date need to be reported immediately to Human Resources.

If the circumstances of an employee's leave change, and the employee is able to return to work earlier than the date approved, the employee must provide reasonable notice to the college of the employee's intent to return to work (i.e., at least 2 workdays prior to the date the employee intends to report for work).

What If I Need an Extension of Leave?

An employee is expected to return to work upon expiration of an approved leave. Failure to return to work upon the expiration of an approved leave without requesting a timely extension of the leave may be considered an unexcused absence. Such absence(s) will be treated in accordance with Beloit College's applicable workplace policies. An employee needing an extension of an approved leave must notify Human Resources of the need for the leave extension as soon as practicable after learning of the need for the extension.

6. Miscellaneous

The Wage and Hour Division of the U.S. Department of Labor is the federal agency that regulates the federal FMLA. Federal law makes it unlawful for an employer to interfere with,

restrain, or deny the exercise of any right provided under the FMLA; or to discharge or discriminate against any person for opposing any practice made unlawful by the FMLA or for the involvement in any proceeding under or relating to the FMLA. Nothing in the FMLA affects any federal or state law prohibiting discrimination, or supersedes any state or local law or collective bargaining agreement which provides greater family and medical leave rights. Employees have the right to file a complaint with the U.S. Department of Labor (“DOL”) or bring a private lawsuit if they feel Beloit College has violated their rights under the FMLA. For more information, you may contact the DOL at (866) 487-9243 or www.wagehour.dol.gov. That being said, it is the preference of Beloit College that its employees first bring any concerns to the attention of the Human Resources Department.

L. Parental Leave for Primary Caregiver (paid)

1. General Policy

In addition to the benefits guaranteed by the state and federal Family and Medical Leave Acts, any full-time employee who has been employed by the college for one full year in a full-time position, who is eligible for other paid leaves, and who is the primary caregiver for a new child, is eligible for a paid Parental Leave of up to six weeks. Only one such leave may be taken within a 12-month period.

Parental Leave for non-primary caregivers and for college staff employed for less than one year is governed by the college's Family Leave policy. Leave for a child's illness or injury is governed by the college's Sick Leave and Family Leave policies.

- a. The leave time must be continuous and must begin with the entry of a new child into the household by birth, adoption, or placement for foster care.
 - i. For any eligible staff member who works less than 12 months annually, only that portion of the six-week period following the entry of a new child into the household that falls within the staff member's appointment term will be available for paid leave. Paid leave may not extend the employee's appointment.
 - ii. An employee requesting a Parental Leave should notify the department head or supervisor and the director of Human Resources at least 30 days prior to the beginning date of the leave, and may be required to provide information that substantiates that they are the primary caregiver before the leave is approved. Parental Leaves must be approved in advance by the staff member's department head or supervisor, the appropriate vice president, and the director of Human Resources.
 - iii. Additional leave of up to a maximum of six weeks will be available to the primary care-giving parent under the college's Family Leave policy. Accumulated vacation or Sick Leave must be used during this period, with the remainder of the leave unpaid.

- iv. Staff employees must submit time sheets or monthly absence reports while on paid leave.
- v. Employees returning from a Parental Leave will be assured their current pay level. The college will make a reasonable effort to allow them to return to the position vacated.
- vi. All benefits coverage continues during paid Parental Leaves. During unpaid leaves, benefits coverage will be determined according to the unpaid leave plan for which the staff member is eligible. Unpaid leave, or leave in addition to Parental Leave, must be requested in accordance with the applicable college leave of absence or Family Leave policy

b. Special Provisions for Faculty

Faculty members may be eligible for parental leave benefits in addition to those guaranteed by the state and federal Family and Medical Leave Acts. These additional benefits are provided to tenure and tenure-track faculty, as well as returning faculty who have been employed for at least two consecutive semesters teaching at least two units per semester. Eligible faculty who become the parent of a child through birth, adoption, or placement for foster care have the following options available:

- i. Up to six weeks of paid leave at the time of birth, adoption, or placement, with the six weeks beginning when the child arrives home and including the portion of the six weeks occurring within the semester; and
- ii. Reduction of up to three-units of teaching credit at any time and in any configuration in the semester in which the birth, adoption, or foster-care placement of the child takes place and/or in the two succeeding full semesters, with the following adjustments made to salary:
 - 1. Up to two-units of teaching credit reduction at full salary.
 - 2. A three-unit reduction in teaching credit at two-thirds annual salary*.

All fringe benefits remain in effect, but those based on salary are prorated on the basis of actual salary paid. The faculty member is expected to carry on their normal professional development, advising, and college service. *Note: The six-week paid leave includes relief from advising and other college service. If the faculty member elects to take a three-unit reduction in a single semester and *not* engage in advising and college service during that semester, they will receive an additional one-seventh reduction in pay in that semester.

Leaves shall be arranged between the provost and the faculty member. The provost will consult chairs of affected departments and programs after being notified by the faculty member who is taking parental leave.

Time spent on Parental Leave shall normally count toward eligibility for salary increases and sabbatical considerations. An untenured faculty member may choose whether or not to count the academic year in which the Parental Leave occurs as part of the probationary period before tenure. This decision must be made no later than six months after the birth or adoption. Such exclusion of an academic year from the probationary period can occur only once for a faculty member prior to tenure consideration.

M. Faculty Bereavement Leave

Faculty are eligible for at least two weeks paid bereavement leave to attend to the affairs associated with the death of an immediate family member, such as a parent, child, spouse, sibling or domestic partner. The leave need not be continuous. If the faculty member's responsibilities require significant travel, involvement in planning funeral arrangements, handling legal matters or disposing of assets, and leave of more than two weeks is required, faculty members may request reduced teaching loads at proportional salary for a specified period. The bereaved faculty member may also explore, with the department/program chair, the possibility of having one or more courses covered by other faculty members. Bereaved faculty members are encouraged to seek grief counseling.

Procedure for reporting: The bereaved faculty member should notify the provost's office and the department/program chair about the need for bereavement leave as soon as possible. Once leave has been requested, the provost will charge the department/program chair with the task of devising a plan to cover the bereaved faculty member's courses and other duties during the bereaved faculty member's absence. This plan may require that some classes be canceled. If the bereaved faculty member is a department/program chair, the provost will charge a senior member of the department/program or an advocate designated by the bereaved to devise a plan to cover the bereaved faculty member's responsibilities. The provost will arrange appropriate compensation for the affected faculty member(s).

N. Military Leave

Employees are entitled to a Military Leave of absence without pay for service in the armed forces of the United States or in a military reserve or National Guard unit. When called to duty, employees should contact the Human Resources Office regarding their benefit status during leave.

O. Educational Assistance Program

Beloit College offers its full-time employees and their spouses, domestic partners, and eligible dependent children the opportunity to enroll in or audit regular on-campus courses without tuition charge under the following guidelines:

1. Eligibility for taking courses under this program begins immediately upon employment.

2. Application for participation in this program shall be made to the Registrar, and must be approved by Human Resources and by the employee's supervisor.
3. A maximum of one unit of credit per term may be taken under this policy, with a limit of two units of credit per year. Enrollment in a course is subject to the approval of the instructor. Full-time, regular students will have priority in obtaining a place in a course.
4. Participants in this program ordinarily will be classified as special students, and all regulations governing the enrollment of special students will apply. At their option participants can apply to become degree-seeking students.
5. Employees may participate in the program with supervisor approval. The supervisor may refuse a request if a satisfactory work schedule cannot be arranged. Supervisors may require all employees to complete a normal work-week by working compensating hours for those spent in class during normal working hours. Hourly employees who attend classes during regularly scheduled work hours will not be paid for time spent in class, and must accurately report hours actually worked on their time sheets.
6. The Educational Assistance Program applies only to the cost of tuition; program or course fees, books, or other materials are the responsibility of the employee.

Course work taken through the Educational Assistance Program will not count towards the Beloit College Tuition Remission and Tuition Exchange benefit.

P. Tuition Remission and Tuition Exchange

Dependent children under 25 years of age and spouses or same-sex domestic partners of benefit-eligible employees are eligible to apply for tuition remission and tuition exchange programs for undergraduate courses.

1. Eligibility and Enrollment

Eligibility for either the Tuition Remission or Tuition Exchange programs shall take effect only after the faculty or staff member has been employed on a benefit-eligible basis by Beloit College for at least the preceding two years.

- a. In determining eligibility for participation in this program, "dependent children" shall be as defined for income tax purposes. A married child shall not qualify for the program unless so listed as a dependent on the employee's tax return, except that a child's eligibility shall continue until the end of the academic semester in which the marriage takes place. Employees must provide a copy of their current tax return as proof of dependency.
- b. Participation in the programs is contingent upon annually verifying eligibility through Beloit and student enrollment at the chosen college, as well as any other requirements with the student's college. These may include filing the FAFSA (Free Application for

Federal Student Aid), an Institutional Financial Aid Application, College Scholarship Service Profile, and any requested student and/or parent federal tax forms. Tuition Remission or Tuition Exchange benefits will not be credited to a student's account until the completed forms are on file.

- c. In the event of the death or total disability of an eligible employee who has completed a minimum of seven years' service to the college, unmarried dependent children under 25 years of age shall remain entitled to the same tuition remission benefits for which they were eligible during the active service of that staff member. In the event of the total disability of an employee, matriculation must occur within two years of the date the employee becomes eligible for disability benefits.
- d. Unmarried dependent children under 25 years of age and the spouse or same-sex domestic partner of a retired eligible employee who has completed a minimum of seven years' service to the college and has reached the age of 59 shall be entitled to the same tuition remission benefits for which they were eligible during the active service of that faculty or staff member, providing matriculation occurs within two years of the date the employee retires from the college.
- e. Upon separation from employment, all benefits applicable to the employee and their eligible dependents shall cease. The tuition remission benefit will be prorated based on the employee's separation date and the point in time in the semester in which the separation occurs.

2. Application and Registration

An eligibility verification form is available from the director of human resources and a copy of the employee's most recent tax return must be presented to the director for verification of dependency. Applicants must file Admission, Financial Aid, and Registration forms in accordance with standard institutional enrollment procedures. Failure to provide all required information may result in the loss of the benefit for the term.

3. General Limitations

- a. Any grants received through federal or state sources and grants and scholarships received from the college, will be applied to assessed tuition first, then the Tuition Remission or Tuition Exchange benefit will be applied to cover the remaining tuition charges. This policy applies to the Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (SEOG) and Wisconsin Grant (for residents of the state of Wisconsin).
- b. The policies apply to Tuition Remission and Exchange programs offered by the college, with the exception of the Associated Colleges of the Midwest (ACM) Tuition Exchange, which allows the Federal Pell Grant and SEOG awards to be applied after the Tuition Exchange benefit. It is important to note that these policies may apply to any other institution at which an eligible student may enroll.
- c. Tuition Remission and Tuition Exchange benefits often do not apply to off-campus study

programs. It is important that a student verify the institutional off-campus study policies as they relate to use of Tuition Remission and Tuition Exchange benefits. In cases where the tuition benefit does apply to off-campus study programs, there may be additional fees that are the student's responsibility. Tuition Remission benefits for students participating in ACM off-campus programs include only programs sponsored, operated or invoiced by the school the student is attending. Beloit College will apply the benefit to the off-campus program tuition or the school's regular tuition rate, whichever is less.

4. Available Programs

a. Beloit College Tuition Remission

Eligible participants may enroll at Beloit College on either a full-time or part-time basis. Eligibility to participate will continue through the equivalent of eight semesters of study or graduation, whichever comes first. Beloit College Tuition Remission generally does not apply to special fee courses or programs. Students must apply by all admission and financial aid deadlines. Tuition Remission applies to off-campus Beloit College programs but may require participant payment of any programmatic costs incurred by the college.

b. ACM, GLCA, and National Tuition Remission Programs

i. ACM Tuition Remission (www.acm.edu)

Eligible participants may apply to one or more of the 13 participating Associated Colleges of the Midwest for Tuition Remission consideration. ACM Tuition Remission is available only to full-time, degree-seeking students. Eligibility for ACM Tuition Remission is determined by Beloit College's own policies. If a student is admitted to a participating ACM College, the ACM Tuition Remission benefit will automatically be awarded. Application for ACM Tuition Remission consideration is made at the time the student applies for admission to the participating institution. The monetary amount of the benefit is determined by the exporting college. As of the Fall of 2019, Beloit College will be awarding 90% of the tuition of the importing institution except for employees whose years of service is described in the schedule below.

Employees whose eligible students have matriculated prior to Fall 2019 will receive the full benefit with no cost-share.

Employees hired prior to July 1, 2008: The Beloit College employee benefit will be 97.5%; the employee will pay 2.5% of the annual tuition per year.

Employees hired between July 1, 2008 and June 30, 2012: The Beloit College employee benefit will be 95%; the employee will pay 5% of the annual tuition per year.

Employees hired between July 1, 2012 and June 30, 2016: The Beloit

College employee benefit will be 92.5%; the employee will pay 7.5% of the annual tuition per year.

Employees hired on or after July 1, 2016: The Beloit College benefit will be 90%; the employee will pay 10% of the annual tuition per year.

- ii. **GLCA Tuition Remission (www.glca.org)**

The Great Lakes College Association Tuition Remission program differs only slightly from the ACM program. Eligible participants will apply for GLCA Tuition Remission only after they have been accepted for admission to, and have decided to enroll at, one of the 13 participating institutions. If the student is accepted for admission to the participating college or university, the GLCA Tuition Remission benefit is guaranteed. Each year the student will pay a “participation fee” in order to receive the benefit. The GLCA office determines the average tuition of all participating institutions and sets the participation fee at 15% of the average tuition. The participation fee is determined annually by the GLCA office and will be billed by the importing institution. Failure to pay the participation fee will result in a discontinuation of GLCA Tuition Remission benefits. The GLCA benefit normally covers full tuition, and is available only to full-time, degree-seeking students.
- iii. **National Tuition Exchange (www.tuitionexchange.org)**

Beloit College is one of over 677+ institutions of higher education that participate in the National Tuition Exchange Program. The amount of the tuition benefit is determined annually by the National Tuition Exchange and is applied to the tuition for the importing institution; some institutions may provide an additional amount toward the cost of attendance. Beloit College’s involvement in the program confers on eligible participants only the right to apply for a Tuition Exchange Scholarship; eligibility does not guarantee an award. While eligibility is determined by the exporting institution, the selection of scholarship recipients is exclusively the right of the importing institution. Participating institutions are charged with the responsibility of maintaining an overall balance between “imports” and “exports.” Therefore, the number of Tuition Exchange Scholarships offered from year to year at a given institution is likely to vary. Since the participating institutions differ greatly in size and type, tuition exchange policies differ from one institution to another. It is necessary to contact each institution directly to determine the amount of that school’s Tuition Exchange Scholarship, as well as the policies governing the award. In general, eligible participants should submit Tuition Exchange certification forms to the participating institutions at the same time that they make application for admission.
- iv. **Limitations**

Beloit College limits benefits for the Beloit College, ACM, and GLCA Tuition Remission and the National Tuition Exchange programs to a cumulative total of eight semesters. If graduation occurs before the participant uses eight semesters of eligibility, the tuition remission or exchange eligibility will cease for that participant upon graduation

Each participating institution has the right to set its own policies governing the administration of tuition remission and tuition exchange. It is important to verify how each college applies state and federal grants, academic scholarships, and outside grants and scholarships to the tuition remission or exchange award. Similarly, it is advisable to clarify with each institution whether or not Tuition Remission or Tuition Exchange Scholarships apply to study abroad or off-campus programs.

Q. Indemnification of Trustees, Officers, and Employees of the Corporation

The Board of Trustees of Beloit College ("the Corporation") shall indemnify any trustee, officer, or employee of the Corporation (and the heirs, executors, and administrators of such person) who was or is or who is threatened to be made, a named defendant or respondent in a proceeding (which means any threatened, pending, or completed civil, criminal, administrative, or investigative action, suit, arbitration, or other proceeding, whether formal or informal, which involves foreign, federal, state, or local law and which is brought by or in the right of the Corporation or by any person) in accord with these Bylaws and to the extent not inconsistent with the provisions of Chapter 181 Wisconsin Statutes, as amended. This policy is intended to authorize indemnification to the fullest extent in accordance with the Wisconsin Business Corporation Law as amended, and shall be construed and applied to carry out such intent.

1. Mandatory Indemnification

- a. The Corporation shall indemnify a trustee, officer, or employee to the extent they have been successful on the merits or otherwise in the defense of a proceeding for all reasonable expenses (including fees, costs, charges, disbursements, attorney fees, and any other expenses) incurred in the proceeding if the trustee, officer, or employee was a party because they are or were a trustee, officer, or employee of the Corporation.
- b. i. In cases not included under subsection (1)(a), the Corporation shall indemnify a trustee, officer, or employee against liability incurred by the trustee, officer, or employee in a proceeding to which they were a party because they are or were a trustee, officer, or employee of the Corporation, unless liability was incurred because they breached or failed to perform a duty they owe to the Corporation and the breach or failure to perform constitutes any of the following:
 - (a) A willful failure to deal fairly with the Corporation or its members in connection with a matter in which the trustee, officer, or employee has a material conflict of interest.

- (b) A violation of criminal law, unless the trustee, officer, or employee had reasonable cause to believe their conduct was lawful, or had no reasonable cause to believe their conduct was unlawful.
 - (c) A transaction from which the trustee, officer, or employee derived an improper personal profit.
 - (d) Willful misconduct.
- ii. Determination of whether indemnification is required under this subsection (1)(b) shall be made under subparagraph 2.
 - iii. The termination of a proceeding by judgment, order, settlement, or conviction, or upon a plea of no contest or an equivalent plea, does not, by itself create a presumption that indemnification of the trustee, officer, or employee is not required under this subsection (1)(b).
- c. A trustee, officer, or employee who seeks indemnification under this section shall make written request to the Corporation.
 - d. Indemnification under this section is not required if the trustee, officer, or employee has previously received indemnification or allowance of expenses from any person, including the Corporation, in connection with the same proceeding.
2. Determination of Right to Indemnification

The trustee, officer, or employee seeking indemnification under subsection (1)(b) shall select one of the following means for determining their right to indemnification:

- a. By independent legal counsel selected by majority vote of a quorum of disinterested trustees or its committee or, if such a quorum or committee is unavailable, by a majority vote of the full board of trustees, including trustees who are parties to the same or related proceedings.
 - b. By a panel of three arbitrators consisting of one arbitrator selected by the trustees entitled under subsection (2)(a) to select independent legal counsel, one arbitrator selected by the trustee, officer, or employee seeking indemnification, and one arbitrator selected by the two arbitrators previously selected.
 - c. By a court under §181.049 of the Wisconsin Statutes, as amended.
 - d. By any other method provided by resolution of the board of trustees.
3. Allowance of Expenses as Incurred

Upon written request by a trustee, officer, or employee who is a party to a proceeding, the Corporation shall, when recommended by independent counsel, pay or reimburse their

reasonable expenses as incurred if the trustee, officer, or employee provides the Corporation with all of the following:

- a. A written affirmation of their good faith belief that they have not breached or failed to perform their duties to the Corporation.
 - b. A written undertaking, executed personally or on their behalf, to repay the allowance and, if required by the Corporation, to pay reasonable interest on the allowance to the extent that it is ultimately determined under subsection 2 that indemnification under subsection 1 is not required and that indemnification is not ordered by a court under section 181.049(2)(b) of the Wisconsin Statutes, as amended. The undertaking under this subsection shall be an unlimited general obligation of the trustee, officer, or employee, and may be accepted without reference to their ability to repay the allowance. The undertaking may be secured or unsecured.
4. Additional Rights to Indemnification and Allowance of Expenses

The Corporation may pay or reimburse expenses incurred by a trustee, officer, employee, or agent in any of the following circumstances:

- a. As a witness in a proceeding to which the trustee, officer, employee or agent is not a party.
 - b. As a plaintiff or petitioner in a proceeding because they are or were an employee, agent, trustee, or officer of the corporation.
5. Insurance

The Corporation may purchase and maintain, on behalf of an individual who is an employee, agent, trustee, or officer of the Corporation, insurance against liability asserted against and incurred by the individual in their capacity as an employee, agent, trustee, or officer, or arising from their status as an employee, agent, trustee, or officer, regardless of whether the Corporation is required or authorized to indemnify or allow expenses to the individual against the same liability under these Bylaws.

R. Dispute Resolution

Beloit College assures its employees an opportunity for prompt and impartial consideration of complaints or grievances arising in the course of their work. This procedure has been developed to assist employees in resolving serious work-related problems and encourages resolution of the dispute through discussion between the parties. If a resolution is not obtained through discussion, employees may submit a request for assistance in accordance with the following procedure:

1. The employee should discuss the dispute with the immediate supervisor. In most cases, a problem can be resolved satisfactorily at this point. If a mutually satisfactory resolution is not achieved, the employee may initiate Step 2.
2. The employee may submit a request in writing to the appropriate person at the next higher supervisory level. If requested, the Human Resources Director will assist the employee in presenting the matter to the proper administrative official. If a mutually satisfactory resolution is not achieved within five working days from the receipt of the written complaint by the proper administrative official, the employee may initiate Step 3.
3. If the preceding two steps fail to resolve the problem, the employee may appeal to their respective vice president. In offices where a vice president is the immediate or next highest supervisor, the appeal may be made to the president. If the dispute concerns the president, it will be handled by the chair of the board of trustees with no other appeal. The decision made by the vice president or president will be considered final.

If a dispute alleges discrimination, harassment or sexual assault, the complaint will follow the procedures set forth in the appropriate policy.

S. Severance Policy

Beloit College will provide a severance payment to employees who are affected by an involuntary termination of employment. The severance payment is intended to provide some financial assistance to help individuals deal with the initial difficulties that may result from the loss of employment. For purposes of the severance payment policy, involuntary termination includes job loss due to budget reductions, work force reduction, organization or job restructuring. Employees who resign, are hired for temporary or term specific appointments, or are terminated for cause or poor performance will not be eligible for a severance payment.

The amount of the severance payment will be based upon years of continuous service with Beloit College. Severance will be calculated on base pay only.

T. Employee Weapons Policy

Beloit College employees are prohibited from possessing or carrying weapons while in the course and scope of performing their jobs, and to the extent permissible by law, when they are performing their jobs while away from Beloit College property. This policy applies to employees regardless of whether or not they have a permit or license to carry a weapon. Weapons include, but are not limited to, firearms (whether loaded or unloaded), knives, billy clubs, tasers, ammunition, explosives and any other device or instrument which, in the manner it is used or intended to be used, could cause death or great bodily harm. Employees who have questions about whether an item is covered by this policy should call Human Resources. Employees are responsible for making sure that any item in their possession is not prohibited by this policy.

Beloit College property covered by this policy includes, without limitation, all Beloit College owned or leased space. Vehicles owned or leased by Beloit College are covered by this policy at all times regardless of whether they are on College property. The policy also applies to employees when conducting business on behalf of Beloit College off-campus. If any Beloit College employee has reason to believe that an employee, student, visitor or other person has a weapon (whether or not concealed) on College property in violation of this policy, the employee is required to report such belief to the Security Office. There will be no retaliation against any employee who in good faith makes a report of a violation of this policy or who assists in an investigation of such a report.

Employees who violate this policy may be subject to discipline, up to and including discharge from employment.

U. Extraordinary Economic Exigency

The determination of the existence of "extraordinary economic exigency" is inescapably the final responsibility of the president for appropriate recommendation to the board of trustees. However, because of the particular impact such a determination may have on the academic program and faculty, there should be early, careful, and meaningful faculty involvement with the provost and, if necessary, the president, in deliberations leading to this final judgment. In all such deliberations, financial considerations should not be allowed to obscure the fact that the purposes of the college cannot be realized if the economic base of the institution is not strong and viable. The provost will always explain the nature of any economic exigency and the reasons for the reduction to the appropriate committees of Academic Senate, and will transmit any recommendations that the committees may make in this regard to the president. Should the president determine that "extraordinary economic exigency" in fact exists, then there should continue to be early, careful, and meaningful faculty and staff involvement based on consultation with the appropriate bodies of Academic Senate and Administration?

As a part of this consultation, appropriate Academic Senate committees shall review the total range of activities of the college and make recommendations to the provost with regard to the division of the reduced allocation of funds. The provost will have the final responsibility for making recommendations to the president with regard to the reduction of academic programs.

Given a decision to reduce the overall academic program expenditures by a certain amount, it will then become a primary responsibility of the faculty to recommend to the provost where reductions should be made. Before any such determination becomes final, those to be adversely affected should have the right to be heard. The primary responsibility for recommendations, however, will be that of the provost, president, and board.

Among the various considerations, difficult and often competing, that have to be taken into account in deciding upon particular reductions, the retention of a viable educational program of high quality should necessarily come first. Particular reductions should follow considered advice from the concerned departments, or other units of the educational program, on the short-term and long-term viability and quality of reduced programs.

If extraordinary economic exigency requires reduction in faculty and staff size, the maintenance of a balanced liberal arts program may require the dismissal of tenured faculty or non-tenured faculty prior to the expiration of the term of appointment. In such a situation the provost shall be willing to abolish positions that in their determination are part of overstaffed programs or departments, even though such abolition may mean that a tenured faculty member may be dismissed while non-tenured faculty are retained in other areas, or in that area itself. If a department or program is to be reduced in number of personnel, such factors as field expertise and the quality of the departmental offerings and instruction shall be considered. In such considerations, tenure shall be given considerable though not absolute weight in relation to these preceding criteria.

Rights under academic tenure should be protected to the degree possible in the event of such reductions. Faculty and staff should be given every opportunity to readapt within the institution; institutional resources, if available, should be used for assistance in re-adaptation. Where early retirement is possible under present policy, it will be employed rather than dismissal. The released faculty member's place will not be filled by a replacement within a period of two years, unless the released faculty member has been offered reappointment and a reasonable time within which to accept or decline it. The college will make a serious effort to help the released person secure other employment.

In making assessments and recommendations with respect to the release of the faculty members, the provost will rely heavily on the advice and counsel of the person chairing the department or program, and the Faculty Status and Performance Committee. Faculty members to be released shall be able to have the issues reviewed by an appropriate faculty committee with ultimate review of all disputed issues by the board of trustees. In all cases the practice of giving a full year's notice to faculty after the first year of full-time service at the college shall be followed if at all feasible from a financial standpoint.

V. Institutional Base Salary Policy

1. Policy Statement

It is the policy of Beloit College ("college") that all faculty and staff salaries charged to grants and other externally sponsored awards must be based on the Institutional Base Salary (IBS) defined in this policy. This policy applies to all individuals whose salary is charged to or with committed effort to any grant or externally sponsored award. The IBS is the baseline against which effort expended by faculty in performing work under a federal award is measured.

2. Scope

This policy is applicable to all schools, centers, departments, faculty, and staff of the college involved in administering grants and other externally sponsored awards.

3. Definitions

Institutional Base Salary (IBS)

Institutional Base Salary (IBS) is the annual or academic year salary or hourly wage paid by Beloit College for duties associated with an individual's annual appointment letter and job description (usually 9-months or 12-months).

IBS does not include additional compensation amounts as defined and allowed under the College's *Additional Compensation Policy for Faculty and Staff* in Chapter V General Employment Policies, section W, of the Administrative Policy Manual. Supplemental pay like stipends or additional salary for acting or interim administrative appointments, special projects or program appointments, faculty course overloads, awards, prizes, discretionary recognition bonuses, summer research mentoring, or faculty summer salary paid by grants or other externally funded awards are not included in the IBS.

4. Roles and Responsibilities

It is the responsibility of all faculty and staff of the College involved in grants or externally sponsored awards to utilize this policy, as applicable to their positions, when preparing and processing personnel appointments, preparing, reviewing, and approving proposal budgets or budget revisions, or preparing, reviewing, or approving efforts reports.

5. References

OMB 2 CFR 200, Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (§200.430 Compensation – personal services) – Effective February 26th, 2026

W. Additional Compensation Policy for Faculty and Staff

1. Scope

Additional compensation recognizes extra responsibilities assumed and contributions made by Beloit College faculty and staff in pursuit of the college's mission and strategic priorities. Additional compensation may be appropriate when faculty or staff accept a temporary assignment that requires a significant investment of time and effort outside the scope of their regular, primary position duties.

This policy establishes consistent standards for submitting, reviewing, approving, and awarding additional compensation, while maintaining the college's adherence to applicable federal regulations. It applies to faculty and staff holding full- or part-time positions. At all times, wage and hour laws, FLSA, and federal guidelines will take precedence in the approval and payment process.

2. Policy Statement

Beloit College recognizes that certain circumstances may warrant additional temporary pay for work performed outside of a faculty or staff member's job duties or employment schedule. Faculty and staff may be eligible to receive additional compensation when added responsibilities meet the criteria below. Requests for additional compensation are subject to the availability of

funds and require advance approval in accordance with Section V of this policy prior to the performance of the extra work. Supervisors must ensure that all employees approved for additional compensation continue to meet expectations in the performance of their regular, primary job duties, and that there will be no adverse effect on the department's operations.

The Beloit College procedure, *Compensation from Grants, Contracts and Other Sponsored Agreements*, details federal requirements for additional compensation paid from externally sponsored awards.

Faculty

The institutional base salary paid to faculty members is a professional stipend or retainer that provides compensation in return for course instruction, advising, professional activity and development, and contributions to the operations of the college, including participation in campus governance through committee assignments. Faculty members, who accept assignments outside the scope of their institutional base salary, may be eligible to receive additional compensation in return. Such responsibilities may be associated with traditional faculty work or may involve administrative duties pursuant to concurrent administrative appointments or special assignments.

Staff

The institutional base hourly rate or salary paid to staff employees provides full compensation for all time spent in the performance of regular duties associated with primary, full-time and part-time appointments. Such appointments generally include total hours, months worked, etc. Staff employees may receive additional compensation for work that occurs largely outside of the employee's regular department and work schedule, is distinctly separate from, and independent of the employee's primary job duties and responsibilities, and requires extra time and effort. Additional assignments must not interfere with the staff member's normal duties. When justified, additional activities for pay may take place during the course of the staff member's normal working hours. It is recommended that staff limit participation to no more than one additional compensation eligible assignment at a time.

Non-Exempt Staff

Non-exempt staff receive pay at regular hourly rates for all time worked in projects approved and eligible for additional compensation. Hours worked must be documented on a separate online timecard. The overtime rate of 1½ times the regular rate applies to all hours worked in excess of 40 in a single week (Sunday – Saturday). Payroll will charge the appropriate funding source and pay any balance due following the completion of the special assignment. Non-exempt staff may not be given additional pay in lieu of overtime pay.

3. Definitions

Non-Exempt Employee

The Fair Labor Standards Act (FLSA) requires payment of at least the federal minimum wage for all hours worked and overtime pay at time and

one-half the regular rate of pay for all hours worked over 40 hours in a workweek (Sunday – Saturday).

Exempt Employee

The FLSA provides an exemption from both minimum wage and overtime pay for bona fide executive, administrative, professional and outside sales employees who meet certain tests regarding specific job duties and salary.

Base Salary Period

Faculty – The academic year is the base salary period for a full-time, 9-month appointment. Summer months and periods during the academic year when the college is not in session, e.g. weekends, holidays, and semester breaks are not typically included in the base salary period. Regular college activities that occur outside of the base period (e.g. student orientation) are included in institutional base salary.

Staff – Annual appointments for individual positions determine base salary periods for staff. Appointments generally include total hours, months worked, etc.

Institutional Base Salary (IBS)

The annual or academic year salary or hourly wage paid by Beloit College for duties associated with an individual’s appointment letter and job description. IBS does not include additional compensation amounts.

Additional Responsibilities

Responsibilities assumed by an individual in addition to regularly assigned duties covered by the base salary period and institutional base salary.

Supplemental Pay (stipends)

Fixed amount payments for services not covered by institutional base salary calculations. Supplemental pay does not increase institutional base salary and is not included when calculating maximum additional compensation limits.

Additional Salary

Payment calculated as a percentage or fraction of institutional base salary for work that is in addition to regularly assigned duties and typically performed outside the base salary period.

4. Types of Additional Compensation

There are two types of additional compensation in excess of institutional base salary:

Supplemental Pay

Supplemental pay may include, but is not limited to:

- Acting or Interim Administrative Appointments
- Special Projects and Programs
- Faculty Course Overloads

- Awards, Prizes, Discretionary Recognition Bonuses
- Summer Project or Research Mentoring

Supplemental pay may be paid from sponsored award funds, if allowable under the terms and conditions of the award. The Office of Government and Foundation Relations must specifically approve supplemental pay charged to sponsored awards.

Professional development funds may be provided in lieu of supplemental pay.

Additional Salary

Additional salary is based on the institutional base salary, but does not increase the individual's IBS. An example would be summer salary paid to faculty & staff with base salary periods of fewer than 12 months.

Additional salary may be paid from sponsored award funds, if allowable under the terms and conditions of the award. The Office of Government and Foundation Relations must specifically approve supplemental pay charged to sponsored awards.

5. Requesting Additional Compensation

In all circumstances, requests for additional compensation must be submitted and approved prior to the performance of the extra work. Requests for additional compensation require an approved **Request for Additional Compensation** form. Route the faculty or staff form, with all appropriate signatures, to Human Resources/Payroll for final approval and processing. When warranted, following discussion with Human Resources/Payroll, an alternate approval mechanism may be used.

6. References

OMB 2 CFR 200, Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (200.430) effective December 26th, 2014

Beloit College Request for Additional Compensation Form

Beloit College procedure (pending), Compensation from Grants, Contracts, and Other Sponsored Agreements

U.S. Department of Labor Fact Sheet #17A

APM

Revisions to Chapter V

Date Chgd	Subsection	Approved
10/20/09	Section E Removed Remaining sections renamed	Per LR/CT
03/30/11	Section H – Replaced Section O relocated to Section I / Following sections reordered Change of Dean’s title to Provost / style guide	AS 03/29/2011
11/01/11	Employee Weapons Policy Inserted	Sr. Staff 10/10/2011
3/25/2016	Infant Care changed to Parental	Per AD 12/2015
6/3/2016	General Limitations	Sr. Staff 06/2016
10/16/17	Section U Added	By Academic Senate-09/2017
3/5/2018	Section H. 4. Page 7	Sr. Staff 03/05/2018
5/31/2018	Section M Faculty Bereavement Inserted	By Academic Senate- 05/02/2018
3/21/2019	Section P. Tuition Remission Policy	Sr. Staff 02/25/2019
6/3/2019	Section H. Early retirement option	Sr. Staff effective 06/03/2019
6/18/2020	Section L. 1. b.	By Academic Senate- 01/29/2020
9/6/2024	Section I	Changed to reflect current practice
4/21/2026	Section V added	AS-April 8, 2026