Retention Issues and Solutions

Tools to Ensure UC Becomes an Employer of Choice

2007/08 CUCSA Staff Retention Committee:

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Introduction

The focus of the Council of University of California Staff Assemblies (CUCSA) throughout the 2007/2008 year was impacted by two significant events which preceded the convocation of this year's council.

- The August 13, 2007, announcement of University of California President Robert Dynes of his intention to step down once a successor could be found.
- The August 22, 2007, release of Regent Blum's paper entitled "We Need to Be Strategically Dynamic", which famed much of the subsequent conversation, university-wide.

When the CUCSA delegates gathered at the Office of the President in early September 2007, the delegates shared the strong sentiment that, despite a lack of clarity about what being "strategically dynamic¹" truly meant UC was now on a course to become "strategically dynamic". In support of Regent Blum's urging that UC not "tackle critical issues in a reactive way," CUCSA sought to examine how CUCSA could partner with The Regents by contributing to the process of UC becoming more "strategically dynamic."

Viewing staff as a strategic resource of the university rather than cost objects that are part of the "many millions of dollars in costs which could be taken out of operations", CUCSA chose to continue to focus on being valued partners. For the past several years, CUCSA has reported on critical staff retention issues that will face the university in the near future. We chose to continue work on this topic, focusing specifically on a number of issues that local staff assemblies consistently highlight as being vitally important. Resolving some of these problems can improve retention of the best and the brightest staff, and directly improve the operational efficiency of the university.

Topics of concern:

- Expansion of UC's Reduced Fee Enrollment Policy to include dependants
- Competitive Compensation
- Professional Development/Succession Planning
- Affordable Housing
- Work/Life Balance

¹ Blum Report, page 1

Importance and Context of Retention and Related Factors

Recent CUCSA reports highlighted the importance and context of the staff retention concern. Topics previously presented focused on the broad subjects of talent identification and succession planning/ knowledge transfer. A summary of key points presented in those reports is provided below.

Risk Factors

The coming wave of retirement exposes UC to significant risk due to the convergence of four factors.

- 1. Loss of experienced employees. Over 1/3 of UC's current workforce is eligible for retirement².
- 2. Expansion of the external job market. Between 2005 and 2015, close to 10 million jobs will open up for professionals, executives, and technicians in the highly skilled service occupations.³
- 3. Reduction in the labor pool.
- 4. Increase in demand for labor.

By 2015, there will be a 15% decline in available workers ages 35-54 years, while demand for this labor increases 25%.⁴

Talent Identification

There are two distinct categories of high-potential employees. The first category includes the top percentage of the workforce: middle or senior managers ready to make their way into the executive ranks. The second category includes top performers at all levels. These new managers and individual contributors identified more by their talent and drive than their track record are identified within the first two to four years of employment and placed in the development pipeline. ⁵

Knowledge Transfer

As we become increasingly aware of the changing workforce and future risk, we must recognize the urgency of knowledge transfer programs to maintain productivity and excellence and the need to capture knowledge before it is lost. The tendency is to turn to technology, while the most effective systems are rooted in informal one-on-one exchanges, the creation of a mentorship relationship or the collaboration between colleagues.⁶

Managing succession planning and knowledge transfer are key to the success of UC. A well developed staff will support the mission of UC and will greatly impact the level,

² CUCSA 2006-2007 report, Strategic Sharing to Develop the Leaders of Tomorrow.

^{3 &}quot;The Perfect Storm. Jay J. Jamrog, Human Resource Institute and University of Tampa. 2004.

⁴ CUCSA 2004-2005 Workforce Evolution Work Group Report.

⁵ CUCSA 2005-2006 report, Knowledge Management: Models and Program Examples.

⁶ CUCSA 2005-2006 report, Knowledge Management: Models and Program Examples.

quality, and cost of service UC is able to provide. Further, a well developed and highly trained workforce will allow The Regents, faculty and senior leaders to remain focused on maintaining and expanding upon UC's preeminence.⁷

Accurately Quantifying the Benefits of Retention

Calculating the cost of losing skilled staff employees is difficult. UC does not maintain data on turnover in a manner that allows a calculation of the cost. The corollary is that lack of this data means that no remedial action is taken. Capturing replacement costs means identifying the following expenses: recruiting, interviewing, hiring, orientation, training, lost productivity due to vacancies, customer dissatisfaction, reduced or lost business, administrative costs, lost expertise, and costs associated with hiring temporary workers.⁸

A generally accepted estimate is that the one-time cost of replacing an employee is approximately 50% of their salary⁹. However, some surveys suggest that the costs are even higher. If these estimates are applied to the UC budget, the results are staggering. According to the <u>UC 2008-2009 Budget for Current Operations Summary of the Budget Request¹⁰</u>, salaries account for 59% of the \$5.4B total operating expenditure, roughly \$3.2B. If UC loses one-third of our employees, approximately \$1.05B in salaries will need to be replaced. The one-time replacement cost for these positions will be at least \$525M¹¹, excluding cost of living increases and the cost of later hires.

By understanding these projected costs, we can see where the cost/benefit curves intersect. Operational and financial efficiency can be enhanced by effectively retaining the employees we want to keep, and attracting the employees we need for future success. This will be increasingly difficult as those that UC wants to attract and keep will be the ones that have the most job opportunities and ability to work for employers other than UC.

Competition

UC can not directly compete with most high tech employers that offer highly competitive salaries, and a variety of benefits including matching 401k contributions, stock option plans, sabbatical leave, free lunches, oil changes, dry cleaning, and onsite car washes. However, UC can and does compete with other public government institutions in terms of benefits, such as the City of San Francisco, City of Irvine, City of Davis, City of San Diego, etc. We compete effectively in retirement, medical/ dental/ vision plans, life insurance, vacation, and paid holidays and sick leave (see **Appendix A**). We employ people who are committed to serving students, the state of California, the public good and providing for the future of California. Fine tuning the

⁷ CUCSA 2006-2007 report, Strategic Sharing to Develop the Leaders of Tomorrow.

⁸ http://www.webpronews.com/expertarticles/2006/07/24/employee-retention-what-employee-turnover-really-costs-your-company 9 http://www.webpronews.com/expertarticles/2006/07/24/employee-retention-what-employee-turnover-really-costs-your-company 10 UC 2008-2009 Budget for Current Operations Summary of the Budget Request

^{11 \$5.4}B x 59% = \$3.18B. \$3.186B x 33% = \$1.05B. \$1.05B x 50% (one time incurred cost) = \$525.7M.

benefits mix offered to UC employees may provide enough leverage to enable UC to compete for the best employees in this sector.

Dependent Fee Waiver

UC's Reduced Fee Enrollment Policy continues to provide an important incentive for staff to choose to work at UC. Since UC is in the business of education, this program perfectly aligns with our mission and goals.

Several years ago, CUCSA prepared a report comparing the UC dependent fee waiver proposal to equivalent programs at similar large universities. This year, CUCSA updated this report to reflect current data and a proposal for a suggested phased fee waiver for dependents implementation plan (see **Appendix B**).

Current data on reduced fee enrollment programs and tuition reimbursement programs at other colleges and universities indicates that UC's educational benefits are not keeping pace with many of its comparison institutions. During recent years, other educational institutions have not only continued their programs but have gradually increased the educational benefits available to employees, including extending educational benefits to dependents of employees. UC's reduced fee enrollment policy is in need of systemwide review, as discussed in a separate report prepared this year by CUCSA¹². The CUCSA Retention Workgroup encourages further enhancements to the existing program, including expanding the program to include offering fee waivers for dependents of staff and faculty employees as a further tool in retaining the best workforce.

Overview of Educational Benefit Programs at other Institutions: (see **Appendix C**)

- Some form of reduced fee enrollment benefit is offered by 4 of the comparison 8 institutions (MIT, Stanford, University of Illinois, Yale)
- Such benefits are also offered by other institutions in California and nationwide, including the California State University System and the University of Pennsylvania.
- The California State University System offers the ability to transfer education benefits to a spouse, domestic partner or dependent child.
- To offset the cost of reduced fee enrollment programs and to comply with restrictions on the use of federal funds for fee waiver benefits for family members of employees, most institutions use a payroll surcharge on all nonfederally funded employees, or treat the fee waiver as lost revenue rather than as a benefit.

CUCSA recognizes the difficulties inherent in expanding the Reduced Fee Enrollment Policy to include fee waiver for dependents of staff and faculty employees, particularly during challenging fiscal times. However, the value of this program as a tool in the employee retention portfolio cannot be overstated.

¹² A Review of the Reduced Fee Enrollment Policy Resolving Contradictions and Redefining the Program for the 21st Century, CUCSA June 2008

Suggestions

CUCSA encourages exploring further enhancements to the existing Reduced Fee Enrollment Policy, including offering fee waivers for dependents of staff and faculty employees. CUCSA encourages the Administration to explore different options for making the expansion of this benefit to dependents a reality. These include: exploring the creation of pre-tax educational deductions; designing a phased approach towards dependent inclusion – allowing full program costs to be realized over several years; using a payroll surcharge on all non-federally funded employees – to comply with restrictions on the use of federal funds for tuition benefits for family members of employees; or perhaps...treating the program as lost revenue rather than as a benefit.

Compensation

Compensation remains a top issue for staff within the UC system. As noted in the introduction, many individuals work at UC for reasons other than salary (institutional reputation, service, work-life balance, relationships, etc.). However, as an employer competing in a shrinking labor market, UC must be able to offer competitive salaries in order to attract and retain employees. While typically not the primary reason, compensation or rather the perception that the compensation is under market is one of the top reasons employees leave an organization¹³ The Regents recognized this and in 2005, they engaged the services of Mercer Human Resources Consulting to analyze the status of UC's total remuneration for staff and faculty.

The findings of Mercer's work were presented to The Regents in September 2005. In that report, Mercer concluded that although the cash compensation for the average UC employee is significantly below market, when the total compensation package is considered, UC is at market. Total remuneration for UC includes cash compensation (base salary), health and welfare benefits, and the retirement program (UCRP). UC lags the market on total cash by 15% but leads the market in health and welfare benefits by 10% and by 63% for retirement.

However, it should be noted, that the components of the total compensation package is valued differently by faculty and by staff and therefore will have a different impact on attraction and retention. For example, younger staff employees may find little value in the UCRP program and might prefer to have cash compensation match, if not exceed, the market. While UC cannot tailor the total compensation program to match individual goals, UC should be aware that the value of the retirement program may not be enough to allow for a 10% lag in cash compensation.

In addition to the analysis prepared by Mercer Consulting, this workgroup researched how UC's actual salaries compare with incomes around the state. For this comparison, CUCSA obtained the median income of UC career staff - \$48,124 (UCOP Compensation Unit 5/16/2008). The median income within the State of California is \$66,810, ¹⁴

¹³ The 7 Hidden Reasons Employees Leave: How To Recognize The Subtle Signs and Act Before It's Too Late, by Leigh Branham, 2005, AMACOM publishers.

¹⁴ Personal Income Tax Statistics 2006 Taxable Year, State of California Franchise Tax Board.

County	Median Income	Variance with UC
Los Angeles	\$57,725	-20%
Merced	\$45,396	6%
Orange	\$75,537	-57%
Riverside	\$58,959	-23%
San Diego	\$67,935	-41%
San Francisco	\$71,529	-49%
Santa Barbara	\$63,534	-32%
Santa Cruz	\$71,445	-48%

When compared with the median income in many of the counties where UC is located ¹⁵ the difference is, in some counties, very significant as the chart below illustrates.

In the September 2005 report, Mercer Consulting recommended that The Regents establish a goal to "obtain, prioritize and direct funds" to match the market on cash compensation over a ten year period. The Regents approved this goal in November 2005. Unfortunately, difficult budget times, increased health insurance costs and the need to reinstitute contributions into the retirement fund have restricted the funding available. Meanwhile, market salary rates continue to increase at approximately 3% per year¹⁶ and while UC has been able to keep pace with these increases it has not made any progress in addressing the 10% market lag.

Suggestions

CUCSA urges The Regents not lose sight of the objective to increase the competitiveness of UC staff and faculty cash compensation. Although a ten-year goal was addressed by The Regents, no real plan was developed to address the salary lag. In addition, ten years is a long time to affect change and will have little impact on current recruitment and retention efforts. Our suggestion is for The Regents to retain addressing the 10% lag in cash compensation for staff and faculty as UC's number one priority, reduce the time period to addresses this lag to five years, while at the same time allocating sufficient resources over that period to affect a change.

Professional Development/Succession Planning

Each year we hear that over one-third of the UC work force is eligible for retirement. There appears to be a consensus on a fundamental level that professional development and succession planning require a commitment to identifying, training, and mentoring the high-aptitude, energetic, next generation of workers at virtually every level. Those ambitious and willing to serve need to be kept up to date on the whole employment picture and the multiplicity of training and advancement options. Management must tap into and develop the existing top talent which, without attention, remains a wasted resource. UC must make a concerted and continued effort

¹⁵ Personal Income Tax Statistics 2006 Taxable Year, State of California Franchise Tax Board.

^{16 2008} Salary Budget Survey, WorldatWork Association

to increase awareness of opportunities for staff, providing the training to pursue these opportunities with preparedness and confidence. For the next generation of supervisors, managers, health care professionals, and technical staff, this will improve effectiveness, improve loyalty and serve to retain key employees in the ever more important under-30 age group.

Many dynamic programs have been developed and are offered throughout the UC system at a considerable investment of time and money. However, developing great programs and course offerings alone will not result in optimal advantage. Many of these programs do not have sufficient follow-through built in to ensure success and value. Successful completion of each program by a staff member should be merely the beginning of a goal-directed plan for putting new learning to use. To ensure success, follow-up should be documented at defined intervals, assessing progress toward the established goal.

Upper management buy-in to investment in the future is essential in providing professional development to all levels of staff. Retention and ongoing encouragement for staff to continue appropriate levels of professional development are one key to knowledge management in a large, dynamic employment setting. The manager and supervisory level should participate by "showing real support for its staff and encouraging them to reach their maximum potential within the University of California" via mentoring efforts.¹⁷ Rob Lynch, President and CEO of Vision Service Plan, consistently ranked as one of the 100 Best Companies to Work For in the United States, emphasizes the need to "reward and invest in (employees) through training and career development," resulting in a desired stable work environment.¹⁸

While there are some impressive programs available at the various locations throughout the UC system, many are so limited in scope as to make their impact on the University minimal. For example, a Leadership Academy limited to 25 participants per year at UCDHS reaches only a small fraction of staff that could benefit from such a program. According to CUCSA's 2006-2007 report Strategic Sharing to Develop Leaders of Tomorrow, it is imperative that UC have the ability to grow internal talent to fill the positions that will exist in the near future.¹⁹ Setting up mentoring programs on a departmental level is one cost-effective manner of knowledge sharing between more experienced workers and newer ones. Teaching and training others is not commonly an inherent skill, however, it is one that can be learned and developed over time, taking into account variations in teaching and learning styles. In order to demonstrate measurable success for such programs, "a training plan should identify the specific knowledge or skills to be transferred and lay out a time table for completing the task." ²⁰

While buy-in at the uppermost levels of management is critical, this must reach down into the manager and supervisory levels, as well. It takes courage to facilitate advancement/promotion of a department's or a unit's best employees; however, all

¹⁷ CUCSA 2003-2004 CUCSA Staff Mentoring Work Group Report.

¹⁸ http://www.vsp.com/careers/html/ceo.jsp

¹⁹ CUCSA 2006-2007 report, Strategic Sharing to Develop the Leaders of Tomorrow.

²⁰ MetLife's Searching for the Silver Bullet: Leading Edge Solutions for Leveraging an Aging Workforce,

must recognize and agree that identifying, mentoring, and encouraging a capable employee is beneficial for the department, beneficial for the university, and beneficial for the UC system. At a higher level of employment, thoroughly prepared and supported, the employee will be more productive and feel personally fulfilled, no doubt maintaining a stronger sense of loyalty to the University.

Suggestions

CUCSA suggests that an aggressive systemwide program and plan be put into place to provide access to and encourage training and career development for staff members at all levels of employment and stages of their careers. Opportunities for staff development must be broadened in scope, serving a much larger proportion of staff, and established measurements of and accountability for success implemented. Follow-up career guidance is recommended to optimize the value of the investment in these staff members. These steps will help provide a more stable transition as Baby Boomers predictably retire.

Housing

As residents of California, many UC staff employees find it difficult to secure affordable housing. Staff are often left with very few choices. Some commute from such long distances in order to afford rent or a mortgage. Exacerbated by increasing fuel prices, even this option may soon not be viable. Anecdotal reports indicate that many younger employees and some long-term employees are leaving the UC and the state, stating that housing costs coupled with below market salaries make it prohibitive to live in California. The loss of more employees may eventually affect succession planning necessary at UC due to the expected surge of baby boomers retirements.

As of December 2007, the National Association of Realtors reports that the national median house price (all types) is \$208,400. According to the California Association of Realtors (CAR) report in December 2007, the median price of existing, single-family detached homes was \$488,640 in November 2007.

Additionally, CAR reports that statewide, the following 10 cities and communities have the highest median home prices:

City	Median Home Price
Newport Beach	\$1,400,000
Saratoga	\$1,300,000
Santa Monica	\$1,100,000
Cupertino	\$1,074,000
Santa Barbara	\$1,065,000
Danville	\$1,021,000
Yorba Linda	\$910,000
San Clemente	\$870,000
Redwood City	\$822,500
San Francisco	\$814,500

Five of these cities are near UC campuses and it is clear from those figures that it would be nearly impossible for the average UC employee to afford such housing prices

with the median income of UC career staff being \$48,124 (UCOP Compensation Unit 5/16/2008).

The Santa Cruz campus has long been successful in addressing this staff housing issue. Santa Cruz has rental and for-sale housing for staff. Additional for-sale housing (Ranch View Terrace) project is currently in-progress. Priority to purchase is as follows:

- 1) Transition List ("Grandfathered" Senate Faculty)
- 2) Senate Members
- 3) A) Staff
 - B) Non-Senate Academics

The Davis campus is creating the West Village housing project (formerly known as "The Neighborhood). This is the second for-sale housing opportunity for staff at the Davis campus. It is a mixed-use community, which will eventually also have housing opportunities for students as well as faculty. For the West Village project, a Qualified Persons for Prioritization²¹ for housing are as follows:

- 1) Aggie Pool
 - Recently Recruited Ladder Rank Faculty
 - Recently Recruited through a national search Staff
 - Current Owners in Aggie Village or West Village (for Phase II of West Village Housing)
- 2) Mustang Pool
 - All Other Faculty
 - Academic Federation
 - All other staff
- 3) Blue and Gold Pool
 - Same as the Mustang Pool but with an access/economic preference

Three UC campuses now have plans to build staff housing on land owned by the university (Davis, San Francisco and Santa Barbara). San Francisco's plan is to have rental units available in the Mission Bay area, which will become available around 2012. Santa Barbara's Sierra Madre housing project will be the first rental opportunity for staff. There may be opportunities for staff housing at the North Campus faculty housing project should units remain unsold after faculty needs have been met. At UCSB, additional plans are being discussed to provide for-sale housing to staff in the future.

Summary and Suggestion

In addition to offering staff housing as part of the recruitment effort for staff, it should also be considered to retain staff on the various campuses that do offer such opportunities. Staff housing, located on or near the campuses, would have the added bonus of less traffic and parking problems. This reduction contributes to the success of the sustainability goals each campus strives to achieve.

²¹ Faculty and Staff Housing Policies within West Village, Draft Report for Comment, University of California Davis, February 2006.

Housing plans at various UC campuses often give primary consideration to faculty. While staff appreciate the contributions faculty make to the University not including staff in housing plans sends a message that staff are not valued for their contributions. When planning new housing, whether for rent or for sale, staff should be both considered and consulted. Often, the University owns land where housing can be built, and can choose to make housing affordable to all staff and faculty.

An important policy change would be to expand the MOP loan program to staff. This program provides low cost mortgages and is currently available only to qualified faculty.

Work/Life Balance

In a time of budget cuts and scaling back of monetary rewards in the workplace, CUCSA feels that the administration of the University of California should focus on enhancing the non-monetary benefits available to staff to show goodwill and maintain morale. Such efforts can improve retention of the quality workforce that keeps the organization running smoothly.

There are many creative ways that UC can encourage positive attitudes such as allowing free use of campus gym/wellness center facilities, reduced rates in dining halls and publication of discounts available to staff from various UC vendors.

Our study in this area focused primarily on the three areas: Child Care, Flexible Work Schedules and Telecommuting.

Child Care

Retaining quality employees and their knowledge base remains a critical business objective for UC and all businesses in general. Quality child care can help address that challenge by giving staff a greater incentive to remain with UC. With employersponsored child care in place, employees can grow their careers at UC without worrying about child care issues.

We have researched some outside studies including one completed by a UC consultant, Bright Horizons. The 2002 Bright Horizons study²² tracked the correlation of the child care center with the retention of staff employees from various businesses including private sector and government employees. It looked at retention across the board, at retention of high performers and at the advancement of women within these organizations. The results showed that access to a child care center increased retention almost 50% which produced aggregate cost savings of \$3.4 million through reduced turnover among center users at these organizations.

In reviewing all of the UC campuses, OP and LBNL, we find many variances in child care availability, cost, and staff assistance programs (see **Appendix D**) Our study focus was on-campus availability, off -campus availability (i.e. UC sites or agreements

^{22 2002} Bright Horizons study (http://www.brighthorizons.com/employer/benefits.aspx)

with non-UC centers), tuition discounts available to staff, and school transportation availability.

A recent survey of staff employees revealed that employees are often unable to take advantage of childcare facilities at their location. High costs and long waiting lists prohibit most employees from accessing this benefit.²³

Availability (on and off campus)

Currently, only UCLA has a system set up (the Child Care Resource Program²⁴) with a Coordinator (1 FTE position) to place staff children in child care centers off campus. Four other campuses – Berkeley, Merced, San Diego, and Santa Barbara have a referral service through their HR websites and the other seven have no published system for helping staff find adequate child care. CUCSA suggests the UCLA model be implemented throughout UC.

Child-care Tuition Discounts (On and Off Site)

Currently, the UC campuses provide reduced child-care tuition rates for students primarily through grant money. Three campuses provide information about the California Department of Education programs for employees and students that meet Income Eligibility Guidelines²⁵. CUCSA proposes going an extra step by providing banded tuition rates, based on salary ranges similar to our health insurance bands, for all UC on-site child care centers. Implementing programs like this are another tool to help retain productive, quality workers in all positions.

Suggestion

With the variations in population size among our campuses and organizations, not all locations could or should provide the same child care options. CUCSA would like to see the university negotiate agreements with local private day care services to provide a reasonable level of availability both on and off site at rates that would be affordable for staff at all salary levels.

Utilizing the "Power of 10" philosophy, we can create a win-win opportunity by showing local day care facilities that they will get volume business from our employees over time, and increase their profitability even at the lower tuition rate. Employees will be secure in the fact that their children are being taken care of while they are at work, and the cost will be manageable. UC will benefit by having staff that are less distracted and stressed, more productive, taking fewer sick days, and staying in their UC jobs because leaving behind affordable child care would be disadvantageous.

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²³ Dunne, Clair. The Golden Handcuffs: Benefits and Staff Employee Retention at the University of California. Graduate research paper - Masters of Public Administration at San Francisco State University.

http://map.ais.ucla.edu/portal/site/UCLA/menuitem.789d0eb6c76e7ef0d66b02ddf848344a/?vgnextoid=5ff875ac22843010VgnVCM100 0008f8443a4RCRD

²⁵ http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,16692,00.html

School Transportation Availability

Most independent child care centers that offer care to school age children before and after school hours employ a van or some other means of transportation between the neighborhood school and the center. This is an incredible benefit for parents to know that their child is getting from school to their afternoon care facility in a stress-free, streamlined manner.

In our research we found that none of the UC campuses or organizations provides this service for their on-site centers. We spoke with UC staff who are parents of school age children and learned that the stress of finding people to transport their children and/or using their break time to leave work, get their children, and then come back makes the inconvenience far outweigh the benefit of having their child at a UC center.

Suggestion

Providing a shuttle bus and driver to pick-up children from local schools and deliver them to UC child care centers would solve this problem. The shuttle may only have to make 2 to 3 trips per day between the local elementary schools and the center. This would be another low cost way to improve morale and increase retention of valuable staff, and potentially improve productivity as staff would not be rushing out to drive children between facilities.

Flextime and Alternative Work Schedules

The advantages to flexible alternative work schedules are many. The UC Davis website <u>http://www.hr.ucdavis.edu/Pubs/All/Altwork/Alternate_Work/Alternate_Work/</u> lists the following examples: increased productivity, lower use of sick leave, improved employee morale, expanded service hours, reduced traffic and parking pressures, and the benefit most important to our research, improved recruitment and retention.

Definitions from the Davis website for Flextime and Alternative Work Schedules are as follows:

Flextime Defined

Flextime or flexible work hours usually begin with an 8 hour work day, but include a starting and quitting time different from the traditional 8am to 5pm work day. It usually includes a core period of time in which the employee is required to be in attendance at the work site. For example, an employee may have an 8 hour work day which starts sometime between 6am and 10am. He/she is required to be at the work site from 10am to 2pm (with a scheduled lunch hour), and may leave between 3pm and 7pm (depending upon the starting time). The core period may vary, depending upon the requirements of the position as well as the needs of the department and the employee.

Alternate Work Schedule Defined

Alternate work schedules are outside the traditional 8am to 5pm but have a fixed arrival and departure time, e.g., 6am to 3pm, 7am to 4pm, 9am to 6pm, 11am to 8pm. They may also include a 4/40, that is, four 10-hour days that comprise a 40-hour workweek, or, in some instances a 9/80, eighty hours

worked in a 9-day workweek (for example, Monday through Friday the first week and Monday through Thursday the second week, with Friday off).

In researching the 10 campuses, OP and LBNL, we looked at which locations had formal policy and agreements regarding flextime and alternate work schedules, which locations provided staff assistance from HR or some other third party for staff trying to establish an alternative schedule, and what the general climate was at each location regarding staff alternatives for scheduling.

Formal Policy and Agreements

Currently half of UC locations have a published policy regarding flextime and/or alternate work scheduling. They have websites within Staff Human Resources which provide written definitions, pros and cons of alternative scheduling, worksheets and checklists for managers and staff and sample agreements. An excellent example of this is UC Santa Barbara's Flexwork Program²⁶.

Santa Barbara performed a Pilot Program²⁷. Among the statistics they found that 86% of the participants felt that their morale was increased, 60% had increased productivity, and 46% had a decrease in absenteeism.

Suggestions

CUCSA would like to see similar programs implemented at all UC locations. Working with the examples set by Santa Barbara, Davis and San Diego, the system can implement programs to provide a non-monetary incentive to encourage retention of our valued staff.

Through informal interviews, CUCSA found that successful flextime/alternate work schedule programs provide a third-party facilitator (such as SHR) to work with staff in defining, implementing and maintaining schedules. One of the largest barriers staff face in requesting alternate schedules/flextime is creating the proposals for management review, getting agreements signed and asking/answering questions about the plan to reduce fear, confusion or apprehension about the change. Currently, four locations (see **Appendix D**) provide such a service through the adoption of an Employee Relations Specialist in the SHR area. This specialist can provide assistance in many other areas of employee relations, but should be designated to provide assistance with flextime/alternate work schedule agreements.

Implementing standardized alternative scheduling policies and agreements throughout the UC community would be highly effective in encouraging growth of such programs.

Summary

In, general, a climate of acceptance and support for flextime/alternate work schedules seems to occur most often with the adoption of standardized programs. Positive support from Administration and the implementation of pilot programs will relieve much of the concern among management and many of the frustrations experienced by staff. In conjunction with this, formalized policies and procedures and creation of

²⁶ http://hr.ucsb.edu/worklife/flexwork.php

²⁷ http://hr.ucsb.edu/worklife/pdf/flexwork_report.pdf

an Employee Relations Specialist position to assist staff and management in this area would greatly contribute to improving retention of staff.

Telecommuting

The advantages related to providing telecommuting as an option for staff scheduling are much the same as those for flextime. Examples from UC San Diego's website²⁸ include: ability to better balance work and personal responsibilities, reduced absences and tardiness, improved morale, commitment and productivity resulting from support for personal work style preferences, potential to maximize office space options, improved transportation and parking options, uninterrupted time for creative, repetitive or highly detailed work, expanded use of equipment, increased cross training, enhanced retention, and enhanced recruitment.,

The definition of Telecommuting from the San Diego website is as follows:

Telecommuting Defined

Telecommuting is a work arrangement in which the employee performs some assigned job duties at home. The employee and supervisor may communicate by e-mail, phone, modem, fax, or pager.

In our research of all 10 campuses, OP and LBNL, we looked for locations that have formal policy and agreements regarding telecommuting, locations that provide staff assistance through HR or a third- party for establishing a telecommuting schedule, and assessed the general climate at each location regarding telecommuting.

Formal Policy and Agreements

All but one UC location has formal policies and procedures including checklists and Employee/Management Agreements available on their HR websites. The language and tone of these policies, while they all accomplish the same objective, is very different. Some use positive language, creating a very positive spin for the idea of telecommuting. It is described in terms that present the option as an excellent benefit for hard working, dependable employees to help with work/life balance. Other campuses use language that puts doubt and fear into management about the dangers of letting your staff work from home.

While it is important to meet business needs, ensure personal safety, computer security and overall work performance expectations, distrusting excellent, motivated staff can cause negative morale and result in decreased productivity.

CUCSA's survey revealed that staff employees often feel that they cannot take advantage of this benefit and that the policy is unevenly applied. Several respondents felt that some managers were opposed to this policy. Staff employees are facing longer commute times and rising gas prices and respondents felt that telecommuting polices could be used to alleviate some of the time and financial costs. In addition, many respondents felt that enhancing telecommuting policies and practices could help

²⁸ http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,441,00.html?coming_from=Content

achieve the University's environmental goals. One respondent suggested that the University plan its infrastructure around telecommuting to meet these goals.²⁹

Suggestions

CUCSA proposes that the verbiage used in telecommuting policies be reviewed at each UC location and where necessary, revised to reflect a tone of appreciation and trust in staff, while still protecting the University's interests in safety, security and productivity.

As with flex schedules, staff at all campuses have expressed the importance of providing a third-party (such as SHR) to work with staff in implementing and maintaining telecommuting schedules and agreements. Currently five locations (see **Appendix D**) provide such a service through the adoption of an Employee Relations Specialist in the SHR area. This specialist would be the same person that was discussed in the flextime/alternate schedule section of this report and could provide assistance in many other areas of employee relations, but be designated to provide assistance in this area.

It is important that UC revise the language and tone of policy and agreement statements throughout the UC community. As noted in the section above, adding the third-party facilitator would be highly effective in increasing the success of telecommuting programs. Telecommuting can be a true benefit to all parties concerned.

Summary

CUCSA interviewed staff and administrators on three campuses that currently enjoy an excellent climate for Telecommuting. These campuses have great programs in place and excellent personnel to administer them effectively. UC can learn from our successful campuses: Davis, San Diego and Santa Barbara. If the other campuses model their programs after these successful programs, we can create a climate of great employee satisfaction and increased retention which will in turn build a better University of California.

Work/Life Balance Conclusion

Improvements in work/life balance provide an opportunity for UC to offer benefits to employees at little (child care) or no cost (flex time, telecommuting, and alternate schedules). At a time of budget cuts and fiscal uncertainty, finding ways to motivate and retain our best staff is vitally important. The cost of implementing these changes to existing programs will be far less than the value the University of California will receive by retaining highly productive and skilled employees over the long term.

²⁹ Dunne, Clair. The Golden Handcuffs: Benefits and Staff Employee Retention at the University of California. Graduate research paper - Masters of Public Administration at San Francisco State University.

The University of California is facing an inherently perilous situation. We can't risk losing key employees in an expanding market with fewer workers to fill key positions. As UC predictably loses baby boomer employees to retirement, we must expect and prepare for the loss of their accumulated knowledge. We can predict that over the next 10 years, we will spend at least \$525M (as calculated on page 5) to replace retiring staff in a tighter labor market.

We recognize that attracting and retaining quality employees is vital to UC's long-term success and California's continued growth and prosperity, and that an appropriate salary and benefits mix are effective tools for ensuring retention.

It is of paramount importance for UC to provide both monetary and non-monetary benefits that leverage UC's core competency – delivering education - to effectively compete for the staff and faculty that will help UC to maintain its competitive edge as an employer of choice in difficult financial times. While UC's retirement benefits are excellent, our wages are low. The modest cost of implementing/augmenting UC's non-monetary benefits would be more than offset by the gains received by UC in the areas of employee recruitment, retention and morale.

To remain the premiere university in the world UC must retain quality staff and faculty Failure to retain good employees will result in inefficiency, operational problems, and cost increases. Developing the proper benefits mix to retain employees, contain overall costs of staffing, and ensure that UC will move forward, unimpeded by the new economic conditions on the horizon is in the university's best interest.

Appendix A - Benefits Comparison

Benefits						Ī					T	Ť	Ť	ompa																				
C = Cafeteria			N	lot all o	compani	es/ cities	s list al	I of the	eir ber	nefits onl	ine																						—	
Plan	dical	Dental Vision	RA C	рсагека	Life Ins	spouse Life	Stor Ins	Extra Life Ins Short &I ond Term	atomis rem sability	Business Travel Accident Ins	tra Long Term re Insurance	Retiree Access to Health Care	IPERS	¥	529 College plan Stock Plans	ofit Sharing Plan	cation	aid Holidays	ick Days	Iternity Leave	arental Leave	Tuition Reimbursement	ployee Referral	ckup Child Care	ild Care Center	lder Care	Gift Matching	Adoption Assistance	Site Services	ter Banefits	scounted	Sabbatical Leave	Link to File	
Google		x x	X		2x sala	0, 2	×			2x salar		8 8 4	ö	100%match up to \$2500 or 50%match of all	× 22	ā i	E S Begin - 15 days, 4th year - 20 days, 6th year - 25 days	12	As necessary	¥ 12 weeks at 75%pay	6 weeks at 75%	₽₽ \$8k per year	52k	5 days through Children's Creative Learning Center	Full and Part Time 12 weeks - 6 years	ū	S3k match to non- profits	\$5k towards expenses	õ Doctor, Oil Change, car wash, dry cleaning, massage therapy, gym, hair stylists, fitness classes, bike repair, Credit Unions	Č Free Lunches and Dinners, sauna, roller hockey, outdoor volleyball court, \$500 for take out dinner during 1st 4 weeks of new baby, \$2k for employee referral		8	<u> </u>	
Starbucks	x	х х			х				х					х	x										Referral Program	Referral Program				1# coffee per week	х			
Yahoo	x	x x	x	x	2x sala	y	x	x	x					25% match	x		Begin - 10 days, 2 years - 3 weeks, 1 more day per year thereafter	12				x		x			x		Doctor, Dentist, Oil Change, car wash, dry cleaning, massage therapy, gym, hair stylists, game room	Consulting subsidies, sodas and coffee, upgrade to Flickr Pro, Yahoo Music Subscription	x	8 paid weeks after 7 years		
Intel	x	х	x	хх	х		х		х			x		х		x :	Begin - 3 weeks, 10 years - 4 weeks	11						х	х	Classes			Dry cleaning, photo developing	Basketball volleyball, aerobics, financial planning classes	:	x		
Celgene	x	x x	x	x x	х	x	x	x	x	х	x			Company match exists but is at their			Undisclosed	12				Undisclosed	_						Credit Union/ Bank, gym	Lactation Rooms, basketball, tennis courts	x	x		
Amgen	x	x x			x		x	x					x	discretion 100% of first 5%, and another 5% of pay from company, regardless of contribution	×		Undisclosed Begin - 2 weeks, 4	16																
City of Davis, Individual Management Employees	x c	c c		x	x		x		x			×	x				after 5 years, 17 days	16 14.5	12 per year		2 months paid, 1x per 24	x								Partially Paid YMCA membership 10 days paid management leave		x	City of Davis Benefits.pdf	
City of Irvine	x	x x	x	x x	x				x			x	x				Begin - 3 weeks, 4 years - 4 weeks, 10 years - 5 weeks	12	12 per year		6 months LWOP	x								Personal Leave, Family Sick Leave, Bereavement leave, 5 days management leave for some, military leave, paid for physical exams, paid jury duty	r		-	Ţ
City of Merced Management	с	c c			с				с			x	x				Begin - 12 days, 5 years - 3 weeks, 9 years - 4 weeks, 20 years - 5 weeks, 25 years - 6 weeks Begin - 2 weeks, 6	12	12			x								5 days administrative leave, paid physical exams, bereavement leave,			City of Merces Management Be	neri
City of Santa Cruz City of San	Ĩ	c c			c c				c c			x	x	x			years - 3 weeks, 11 years - 3 weeks + 1 day per extra year of service	11			5 days paid	x											Santa Cruz Management Be	nefi
Diego City of San Francisco	с	c c		^	U				с					^			Begin - 2 weeks, 6 years - 3 weeks, 16 years - 4 weeks	11	13			x								Credit Unions		×	_	
Nugget Markets	x	x x			х				x					2% match		x	up to 5 weeks per year		Yes											Flexible Scheduling				
Playtex (Blum)	888-	310-429	0					~	v					match 100% of first						FMLA	up to 10 days paid for birth or adoption				×	LW		20 days unpaid leave when coupled with 10 family care time paid days		Free Checking, preferred rates on credit cards, discounted home mortgages, free acity deposit box, discounted rates on home and auto insurance, legal services, 3 days paid bereawment per relative, up to 4 hours per month paid for community volunteerism			Lifework	(5
(Gould) Ameriquest Capital		<u> </u>						×						6% if you invest 15%		H	x			FMLA	adoption					LVV		paid days		community volunteerism	ľ	^	Plan	
(Hopkinson) Westwood One		_	H	+		+	+	\square	\dashv		+	-	+		\vdash	\square		-			-		H								$\left \right $	+	—	
(Pattiz)																													Fitness Center, Credit Union, Car Wash, Custom Framing, Dry Cleaners, Shoe	t				
Pictures (Lansing) Modesto Jr College (Johnson)	x	x x	x	x x	x				x					x											x				Repair, Barber, Florist, Hospital	Employee Screenings		×		
ImpreMedia (Lozano) LaOpinion (Lozano)																																		
Marcus & Millichap (Marcus) San Diego		T																																
Padres (Moores)	$\left \right $	_		+		+			+			-	\parallel																					
Aurora Capital Group (Parsky Ruiz Foods (Ruiz)																																		
Standard Chartered Bank London (Schilling)																																		

Appendix B – Educational Fee Waiver for Dependents Position Paper

Updated Position Paper in Support of an Educational Fee Waiver for Dependents

Council of University of California Staff Assemblies (CUCSA) Retention Workgroup 2007-2008

Introduction

As one of the tools to better retain quality staff, the 2007-08 CUCSA staff retention committee updated the 2006 CUCSA Educational Fee Wavier proposal. The Council of University of California Staff Assemblies (CUCSA) fully supports the proposal put forth by the Academic Council in January 2000, and as updated and reiterated in a letter dated June 18, 2002 from former Academic Council Chair Viswanathan, to provide an education fee waiver for UC students who are dependents of vested UC career employees.

The past proposal was originally developed by HR&B in consultation with the Faculty Welfare Committee and endorsed by the academic Council. The Council of Chancellors endorsed moving forward with the proposal.

Such a benefit has been a repeated topic of discussion at CUCSA meetings and among location staff assemblies and has been voted one of CUCSA's top priorities during the past two years. CUCSA's support for the Academic Council proposal was outlined in a letter from then CUCSA Chair Kathryn Day-Huh to Lubbe Levin, then AVP, Human Resources, dated April 4, 2000, in which Day-Huh noted that "the fee waiver will assist the University in the recruitment and retention of the very best individuals...We view the overall cost as a worthwhile investment in the University both as a premier educational institution and as a model employer."

The proposal had been approved in concept by the University administration, (August 4, 2000 letter from Lawrence Coleman, Chair of the University-wide Senate, to UC Faculty and June 18, 2001 letter from President Atkinson to academic Council Chair Cowan), although financial and logistical questions have delayed implementation. In a letter to Academic Council Chair Gayle Binion dated September 13, 2002, President Atkinson acknowledged the broad support for the proposal among faculty and staff, but noted that "we are not hopeful that funding can be found in the next few years with the current state of the University's budget. We are also concerned that carving out (funds) for this program…instead of allocating more money to salaries or health benefits would not be prudent or well-received by the legislature…. While the Educational Fee Waiver remains a high priority for me, medical benefits are currently our top benefit priority and I do not want to detract from our efforts in that area."

Summary of the UC Proposal

- Implement a full waiver of the UC annual educational fee for undergraduate and graduate education for qualified dependents of employees fully vested in UCRS (Criteria for 'dependents' would be same as current criteria for health and welfare benefits eligibility, including domestic partners and children up to age 23.)
- Allow Chancellors the authority to grant exceptions to the requirement that employees be fully vested in UCRS (i.e. have five plus years of service) to meet documented recruitment needs.
- Provide a maximum of 12 person years of fees per eligible employee for dependent waiver.
- Waive only the educational fees, not registration or professional fees.

• Require the employee's home location (rather than the dependent student's campus) to bear the cost, as this program would be considered an "employee benefit".

Benefits of Establishing an Educational Fee Waiver for Dependents

- Effective tool for recruiting and retaining quality staff and faculty
- Aid in increasing overall morale of all UC employees.
- Help to assure a quality workforce.
- Helps UC to maintain its competitive edge as an employer of choice in difficult financial times.
- Allows UC to reflect the "pride of ownership" that staff and faculty have in their employer.
- Modest cost would be more than offset by gains in recruitment, retention and morale.

Overview of Educational and Tuition Fee Waivers Offered by Other Institutions:

- Offered by 4 of the Comparison 8 Institutions (MIT, Stanford, University of Illinois, Yale)
- Also offered by a number of other institutions in California and nationwide, including the Cal State University System and the University of Pennsylvania.
- Cal State University System offers the ability to transfer the benefit to a spouse, domestic partner or dependent child.
- Because of restrictions on the use of federal funds for tuition benefits for family members of employees, most institutions use a payroll surcharge on all non-federally funded employees, or treat the fee waiver as lost revenue rather than as a benefit.

Key Elements of Fee Waiver Programs Offered by Comparable Institutions:

Stanford (Tuition Grant Program)

- Pays all or part of actual tuition to accredited colleges and universities.
- The benefit payable per eligible child, up to the maximum, is based on the FTE of the appointment. Maximum allowable for 2007-08: \$17,400 for full academic year, \$8,700 for each semester, and \$5,800 for each quarter.
- Eligibility: Staff eligible after five years of continuous benefits-eligible service; faculty and senior staff eligible immediately after appointment.
- Benefit for children only.

University of Pennsylvania

- Eligibility: Fulltime staff and faculty and limited service employees who have completed three years of service.
- Benefit for dependent children, enrolled at the University of Pennsylvania as a degree candidate in good standing.
- Benefit covers 75% of undergraduate and technology fees, 75% of tuition and technology fees for Medical, Dental, Veterinary, Law and Wharton MBA Schools, 100% of tuition and technology fee for all other graduate schools.

California State University System (Fee Waiver Program)

- Eligibility: Faculty, full-time employees, and part-time career employees. Employees who do not use the waiver for their own work-related coursework at CSU may transfer the benefit to a spouse, domestic partner or dependent child.
- Benefit to employee, spouse, domestic partner and dependent children up to age 23.

- Eligible employees or dependents may enroll in a maximum of two courses or six paid units, whichever is greater, per term at any CSU campus.
- Fee is waived, no transfer of funds from one campus to another (e.g., where staff person and beneficiary are at different campuses).

MIT (Children's Scholarship Plan)

- All staff and faculty who work at least 50% of normal full-time work schedule and are appointed for at least one year.
- Benefit covers full tuition (not including room and board, required fees or other educational expenses) for four years of undergraduate study at MIT as long as the child is a fulltime student. The benefit is prorated based on FTE. In some cases, the benefit can be used at accredited universities other than MIT.

Johns Hopkins (Tuition Grant Plan)

- Eligibility: Dependent children (to include dependents of same-sex partners) of full-time staff and faculty who have completed a minimum of two consecutive years of full-time employment at JHU and continue in a fulltime position. The two year employment requirement may be waived for full-time support staff who come to the University directly from other colleges or universities where they were previously eligible for the same kind of benefit.
- Benefit: The Plan pays 50% of undergraduate tuition and universal academic fees at a degree-granting, accredited institution, up to maximum value of one-half of Hopkins' freshman undergraduate tuition. Participation is limited to no more than four years per dependent child.

Yale (Scholarship for Children of Employees)

- Eligibility: A parent of the student must have been a full-time employee during the entire six years preceding the date of application.
- Benefits: The amount of the scholarship is equal to one-half of the school's tuition and general fees, up to \$14,200 or \$7,100 per semester/term for 2007-08. No student may receive a scholarship for more than eight terms for a bachelor's degree or four terms for an associate's degree.

University of San Diego (Tuition Remission)

- Eligibility: Fulltime employment in a benefits-eligible continuing position. Employees are eligible after a year of service; their dependents, spouses and domestic partners are eligible after the employee has been in service for two years or longer.
- Employees, spouses, registered domestic partners and children may participate.
- The University's goal is that annual costs for the program not exceed approximately 1% of the University's annual operating budget.
- Employees may use the benefit for a maximum of 18 credits per academic year, or 22 credits for law school studies. Spouses, domestic partners and dependent children can receive tuition remission for Intersession and Summer Session only on a space-available basis. Primarily for undergraduate tuition, limited to certain University of San Diego programs.

University of Illinois

• Child of an employee under the age of 25 attending the University of Illinois or other Illinois senior public university can receive a 50% tuition waiver, excluding fees, for up to four years.

Arizona State University (Employee Tuition Wavier)

• Eligibility: Fulltime employment

- Employees, spouses, registered domestic partners and children may participate
- Benefits: Vary per the department that the employee is employed with. The tuition waiver fee can be anywhere from 25% to 50% of the tuition.

New York University (Tuition Remission)

- Eligibility: Full-time, regular employee in an eligible job category. Retired faculty and staff who meet University eligibility requirements and retirement criteria are eligible for the same Tuition Remission benefits for which they were eligible prior to retirement.
- Tuition Remission covers tuition, the largest expense of attending NYU. For employees, the benefit will also cover 50% of the course registration fees. Spouses/registered domestic partners and dependents will pay 100% of the course registration fees. In addition, you are responsible for service fees, or any other incidental expenses.

Results of Staff Opinion Poll

During the 2001-02 year, CUCSA collected anecdotal information about the proposal of a UC-wide educational fee waiver program for dependents, in order to accurately reflect the concerns of UC employees. Recipients, both staff and faculty members, were asked to read the background information and then offer responses to the questions that are outlined below.

"UC is considering an educational fee waiver program to benefit dependents of UC employees (as defined in UC's health benefit program), who have been admitted to a University of California campus. This program would waive the UC educational fee for dependents of vested, career employees. If UC were to implement an educational fee waiver program for dependents, would this be:

Question 1: Worthwhile to you? Question 2: Beneficial to UC?"

Out of 1475 individual responses, 91% responded positively to question 1 and 98% responded positively to question 2.

A more recent survey conducted in 2008 by one of our delegates asked if the reduced fee enrollment policy should be kept as is or expanded? Of the 1205 who responded to this question, 559 answered that it should be kept as is however 648 answered that it should be expanded. Respondents were also asked to explain how they would like to see this benefit expanded. The responses demonstrated a growing awareness of educational fee wavier policies offered at comparable institutions. The qualitative analysis indicated that respondents were perplexed as to why other educational systems, such as the CSU system, has a much more liberal and inclusive benefit that is extended to children and partners whereas UC's policy was limited and restricted. When asked to expand upon what benefits influenced their decision to work at UC, one respondent replied "I thought I would get tuition assistance. I was wrong." Another responded "Some other universities offer tuition assistance for children. UC offers lower salary and doesn't compensate for kids tuition."³⁰

³⁰ Dunne, Clair. *The Golden Handcuffs: Benefits and Staff Employee Retention at the University of California.* Graduate research paper - Masters of Public Administration at San Francisco State University.

Suggested Phased Fee Waiver Proposal for Dependents Implementation Plan:

- 2008-2009 Complete a review of the current reduced fee enrollment policy, and provide clear guidelines for accessing benefits.
- 2009-2010 Implement expansion of the program to allow eligible (vested) UC employees who do not use the reduced fee enrollment policy for their own coursework to enable a single dependent (spouse, domestic partner or dependent child) to access a fee waiver for completion of one degree.
- Starting 2015 UC would implement the full program, as described above, for all staff and faculty who meet established conditions and qualifications.

Summary of Staff Perspective

CUCSA recognizes the difficulties inherent in implementing such a proposal during challenging fiscal times. Therefore, we encourage the Administration to embark on the phased approach as outlined in this proposal, to begin implementing an enhanced reduced fee enrollment policy to include fee waiver for dependents.

Many other colleges and universities have already implemented generous dependent fee waiver programs, in an equally challenging budget climate, and amidst other organizational distractions. They have realized the importance of offering this additional benefit to their employees. An expanded reduced fee enrollment policy to include fee waiver for dependents would align perfectly with UC's mission and goals. It would also provide UC staff with benefits equivalent to those offered by the California State University system.

Appendix C – Summary Tuition Reimbursement Matrix

Schools	Full Time	Part Time	Worked for One Year	Worked for 2 yrs or more	Worked for 5 yrs or more	Worked for 6 yrs or more	Cover 100%	Cover 50% or more	Cover at least 20%	Waiver 6 Units	Waiver 15 Units or More	Benefits applies to Employee	Benefit applies to Child	Benefit applies to Spouse
Stanford	Yes	No	No	No	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Yes	No
California State University	Yes		No	No	No		No	No	No		No	Yes	Yes	Yes
University of San Diego	Yes			Yes	Yes		Yes	No	No			Yes	Yes	Yes
Pepperdine University	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes, But Varies	Yes	Yes	Yes	Yes	Yes	Yes
Yale	Yes			No	No		No	Yes	Yes		Yes	No	Yes	No
Duke University	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No
Brown University	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No
John Hopkins	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Georgetown University	Yes	No	No	No	Yes	Yes	Yes	No	Yes, But Varies	Yes	Yes	No	Yes	Yes
University of Pennsylvania	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Yes	No
New York University	Yes	No	Unknown	Unknown	Unknown	Unknown	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Massachusetts Insitute of Technology	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No
University of Illinois	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Yes	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown
Arizona State University	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Appendix D – Work Life Balance Research Results

CHILDCARE	Berkeley	<u>Davis</u>	<u>Irvine</u>	<u>LBL</u>	Los Angel	Merced	<u>Riverside</u>	<u>San Dieg</u>	<u>San Fran</u>	<u>Santa Bar</u>	Santa Cru	UCOP	<u>University</u> of Michigan	Community	<u>Cal State</u> <u>Colleges</u>	<u>Private</u> Sector/Bright Horizons Study
				None, but		none, but										
On Campus Avail.	3 sites	2 sites	6 sites	plan	3 sites	plan	1 site	3 sites	3 sites	1 site	3 sites	none	3 sites	Yes	Yes	Yes
Off Campus Avail.	referrals	2 sites	none	None	resource program	referrals	none	referrals	none	referrals	none	none	referrals	referrals	Yes	Yes
) / /h) / /h								
Discounts for Staff	none	Yes/based on salary	none	NA	none	NA	none	Yes/based on salary	none	Yes/based on salary	none	NA	Yes/based on salary	Yes for all	Yes for all	Fully Subsidized
School																
Transportation	none	none	none	NA	none	NA	none	none	none	none	none	NA	none	none	Some	Yes
																97% Staff Retention rate
	Berkeley	Devie	Irvine	I BI		Maraad	Disconsido	Can Dian	Con From	Santa Bar	Ocarta Ocar	11000	of	<u>Cal</u> Community Colleges	Cal State	

													<u>of</u>	Community		
FLEXTIME	Berkeley	<u>Davis</u>	Irvine	<u>LBL</u>	Los Angel	Merced	Riverside	San Dieg	San Fran	Santa Bar	Santa Cru	UCOP	<u>Michigan</u>	<u>Colleges</u>	<u>Colleges</u>	
Standardized				Proposed								Yes for				
Policy	No	Yes	Yes	but not yet	No	No	Yes	Yes	Yes	Yes	No	exempt	No	None found	Yes	
Employee																
Assistance from																
nonbiased party	Yes	Yes	Yes	No	No	No	No	Yes	No	Yes	No	No	No	No	No	
General Climate	Good	Excellent	Good	Fair	Fair	NA	Good	Excellent	Good	Excellent	Good	Good	Fair	NA	Good	
													1			

													University	Cal		
													<u>of</u>	Community	Cal State	
TELECOMMUTING	Berkeley	Davis	Irvine	LBL	Los Angel	Merced	Riverside	San Dieg	San Fran	Santa Bar	Santa Cru	UCOP	Michigan	Colleges	Colleges	
Standardized															Generally	
Policy	 Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	None found	Yes	
Employee																
Assistance from															Generally	
nonbiased party	Yes	Yes	No	Yes	No	No	No	Yes	No	Yes	No	No	No	No	Yes	
General Climate	Good	Excellent	NA	Fair	Fair	Good	Fair	Excellent	Good	Excellent	Fair	Good	Fair	NA	Excellent	