

OBERLIN

COLLEGE & CONSERVATORY

TUITION SCHOLARSHIP PLAN FOR CHILDREN OF OBERLIN COLLEGE EMPLOYEES

Policy Background

<u>Responsible Position for Policy:</u>	Director of Compensation and Benefits
<u>Office/Department Responsible for Policy:</u>	Human Resources
<u>Division Responsible for Policy:</u> Administration	Vice President for Finance and
<u>Scope of Policy:</u>	Institutional
<u>Original Issue Date:</u>	09/1957
<u>Last Revision Date:</u>	07/2010
<u>Log of Previous Revisions:</u>	06/1972; 07/1972; 12/1975; 01/1976; 09/2004; 10/2004; 06/2005; 07/2005; 07/2010;

I. Policy Purpose

The Tuition Scholarship Plan makes available scholarship funds to children of employees.

II. Policy Statement

The Tuition Scholarship Plan was established at Oberlin College by action of the Board of Trustees in November, 1957. Provisions of the Tuition Scholarship Plan are subject to approval and modification by the Board of Trustees. The program makes available scholarship funds to children of employees. The Board hopes to continue the program, but cannot foresee all possible eventualities, and makes no future commitment. The Program could be amended at any time.

III. Policy Scope/Eligibility:

A. Employee. Eligibility is based on the employee's eligibility for all other benefits. Each employee class may be different as to benefit and eligibly. All employees are listed within this policy.

B. Child. The child will be eligible under this program provided:

1. The child is not over age 25. This provision is interpreted to mean that the student will not have reached their 26th birthday as of the first day of classes of the semester or quarter for which the scholarship if requested.
2. The child is not married.

3. The child must be studying for their first undergraduate degree and does not already hold a first degree.
4. The child is a dependent child (natural or legally adopted). Stepchildren, foster children, and other dependents who are not legally adopted by the employee are ineligible.
5. The child must be a “dependent” child. The employee must have claimed the child as a dependent on their most recent federal income tax return.
6. The child must have been born before the date of their parent’s retirement from Oberlin College.
7. If the child’s parent (Oberlin College employee) dies after completion of five years of full-time service, the child would remain eligible if:
 - a. the child is dependent on the surviving spouse or the deceased employee; and
 - b. the surviving spouse has not remarried;
 - c. if child becomes an orphan because of deaths of both parents, they are eligible provided they have not been legally adopted into another immediate family and are not over age 25.
8. The child must be enrolled at an institution that is approved by one of the two regional accrediting agencies, ACICS or ACCSCT.

C. Benefit. The child is eligible to receive the tuition benefit for eight (8) full-time undergraduate semesters or equivalent full-time undergraduate quarters. Payment is limited to tuition; other mandatory fees are not covered.

1. A child with two parents working for Oberlin College shall have only one parent’s benefit provided. The scholarship may not be combined. The parent with the better benefit may apply for the benefit.
2. In the case of children of part-time employees, the benefit shall be prorated, by applying the fraction amount of the appointment to the benefit, except that no benefits will be available for employees whose appointment is less than half-time.
3. All funds will be paid directly to the institution attended by the child; the College will not make payment directly to the employee or child. The college will never pay more than what is owed under any circumstance. Should an over payment occur, the College will require the employee to repay the College any amount(s) over the allowed amount of tuition.

D. Tuition Exchange Program. Oberlin College is a member of the Great Lakes Colleges Association, Inc. (GLCA) which operates a tuition exchange program with member schools. A student eligible for tuition exchange because of parental employment at one of the participating schools may receive tuition at one of the other schools in exchange. The exchange is for regular academic year tuition only.

1. Please see the GLCA Tuition Remission Exchange Program Guidelines for more information. A copy may be requested from the Department of Human Resources.

E. Oberlin College Tuition. Children who are admitted to Oberlin College shall be entitled to free tuition at Oberlin College. The benefit is limited to tuition. Other mandatory fees are not covered and are to be paid by the employee/student.

F. Fees. Participation fees paid to the attending GLCA School are to be paid by the employee/student. Employees are responsible for the Participation Fee, which is established annually by the Great Lakes College Association.

G. Away Program / Study Away. Tuition paid for away programs and/or study abroad programs are limited to two (2) semesters in total. Tuition must be paid to a U.S. school and apply to a degree program at a U.S. school.

H. Oberlin College Away Programs / Study Abroad. The vesting period must be satisfied before the child may use the tuition benefits towards Away Programs / Study Abroad programs.

I. Outside Scholarships. Any outside scholarships that are directed as tuition only will reduce the amount of the tuition paid by the Oberlin College. Any outside scholarships that are directed as used for "anything" (room, board, and/or books) will not reduce the amount from the College. If room, board and/or books are not listed on the bill, the expenses will not reduce the amount of tuition paid. Pell grants and SEOG grants will not reduce the amount of tuition paid. The College will never pay more than what is owed on the tuition bill/statement. Any loans will not be taken into consideration for tuition payments as these moneys must be repaid to the lender(s).

J. Faculty and A&PS.

1. For Faculty and A&PS whose appointment became effective on or before June 30, 1972, and who have served continuously since that time:
 - a. Children of such employees shall be entitled to scholarship in the amount of the tuition charged at the institution attended, or tuition at Oberlin College, if admitted.
2. Faculty whose appointment became effective on July 1, 1972, or thereafter, up to December 31, 1975, and who have served continuously since that time:

- a. Children of such employees shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college, the scholarship will be eighty (80) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
3. Faculty and A&PS whose appointment became effective on January 1, 1976, or thereafter, up to June 30, 2010, and who have served continuously since that time:
 - a. Children of such employees shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college, the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
4. Faculty and A&PS whose appointment became effective on July 1, 2010, or thereafter, and who have served continuously since that time:
 - a. Children of such employees shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted, or tuition exchange if admitted to a GLCA school.
 - b. If attending another college, the scholarship requires a four (4) year vesting period.
 - i. After the vesting period, the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less
5. Faculty and A&PSA with an FTE greater than .50 would have eligibility although FTE less than one full FTE would have the tuition prorated. There is no benefit for an employee with an appointment less than .50 FTE.
 - a. Non-continuing faculty would receive tuition benefit(s) only if the four (4) year vesting has been satisfied.

K. Faculty Sabbatical – Research Leaves.

1. Tuition for the children of Faculty will continue during a sabbatical or research leave and may also be authorized for certain leaves without continuance of Oberlin College salary.

L. Administrative Assistants.

1. The employee must be employed as a classified Administrative Assistant for

two (2) continuous years immediately prior to eligibility. The children of part-time, regular status Administrative Assistant shall be eligible for the tuition benefit on a prorated basis.

2. Administrative Assistants: children of such employees shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted, or tuition exchange if admitted to a GLCA school. The employee will be required to pay any fees applied to the GLCA exchange program.
3. After five (5) years of continuous employment children of such full-time regular status Administrative Assistant who attends an accredited undergraduate private institution, state institution, out-of-state institution, or community college will be entitled to a scholarship equal to twenty (20) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
4. After ten (10) years of continuous employment children of such full-time regular status Administrative Assistant who attends an accredited undergraduate private institution, state institution, out-of-state institution, or community college will be entitled to a scholarship equal to fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
5. Administrative Assistants employed for nine months, 37.5 hours per week are considered full-time under the Tuition Exchange program.

M. Carpenters.

1. The employee must be employed as a classified Carpenter for 60 months (5 years), the last 24 of which must be on a full-time continuing appointment. A classified Carpenter in a part-time position will have the scholarship amount prorated.
2. Carpenters: children of such employees shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted, or tuition exchange if admitted to a OLCA school. If attending another college the scholarship will be twenty (20) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.

N. Safety and Security

1. Officers whose appointment became effective before June 30, 2005: must have been employed as a full-time classified Safety and Security employee for two (2) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
2. Officers whose appointment became effective on or after July 1, 2005: must have been employed as a full-time classified Safety and Security employee for five (5) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be twenty (20) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.

3. Officers whose appointment became effective on or after July 1, 2005: must have been employed as a full-time classified Safety and Security employee for ten (10) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.

O. Service Employees

1. Service Employees whose appointment became effective before September 30, 2004: must have been employed as a full-time classified Service employee for two (2) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
2. Service Employees whose appointment became effective on or after October 1, 2004: must have been employed as a full-time classified Service employee for five (5) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be twenty (20) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.
3. Service Employees whose appointment became effective on or after October 1, 2004: must have been employed as a full-time classified Service employee for ten (10) continuous years immediately prior to eligibility shall be entitled to receive a full tuition scholarship at Oberlin College, if admitted. If attending another college the scholarship will be fifty (50) percent of the Oberlin College tuition which is in effect during the year for which payment is made, or the tuition of the institution attended, whichever is less.

IV. Ineligibility

A. Faculty and A&PS

1. Children of employees who leave the service of the College by ways other than retirement, disability, or death while in service lose eligibility on the date of termination of the employee's College service.
2. Any children born or adopted after the employee is no longer an active employee are not eligible for the tuition benefit

B. Administrative Assistants

1. Children of employees who leave the service of the College by ways other than retirement or death while in service (e.g., disability, termination, unpaid leave, etc.) lose eligibility on the date of termination of the employee's College service.
2. Any children born or adopted after the employee is no longer an active employee are not eligible for the tuition benefit

C. Carpenters

1. Children of employees who leave the service of the College by ways other than retirement or death while in service (e.g., disability, termination, unpaid leave, etc.) lose eligibility on the date of termination of the employee's College

service.

2. Any children born or adopted after the employee is no longer an active employee are not eligible for the tuition benefit

D. Safety and Security

1. Children of employees who leave the service of the College by ways other than retirement or death while in service (e.g., disability, termination, unpaid leave, etc.) lose eligibility on the date of termination of the employee's College service.
2. Any children born or adopted after the employee is no longer an active employee are not eligible for the tuition benefit.

E. Service Employees

1. Children of employees who leave the service of the College by ways other than retirement, death while in service, or disability (e.g., termination, unpaid leave, etc.) lose eligibility on the date of termination of the employee's College service.
2. Any children born or adopted after the employee is no longer an active employee are not eligible for the tuition benefit.

V. General Provisions

A. The College will provide scholarship if:

1. study is undertaken in an institution of higher education in the United States accredited by the appropriate regional association except payment will be made for study outside the United States (only two (2) semesters) provided credit earned from such study applies toward a degree at an institution of higher education in the United States;
2. study is undertaken for credit toward the first (bachelor's) degree;
3. the eligible child does not already hold a first undergraduate degree;
4. the study is undertaken in residence at the institution granting credit (as the term "residence" is understood by that institution).

B. The College's obligation is limited to providing scholarships for tuition (excluding fees) for four academic years or their equivalent. Tuition payments arranged for by Oberlin College through the tuition Exchange Plan (GLCA) shall count as charges against a child's total eligibility.

C. An eligible child, who studies part-time, either during the regular academic year or during the summer, will use a portion of the total eligibility corresponding to the ration of the cost of part-time study to the cost of full-time study at the institution in which the study is undertaken.

D. The College will provide its grant only directly to the institution attended; the College will not make payments directly to the individual or to his/her parent or guardian.

E. In the event that it should ever be contended or determined by any governmental authority that the allowance of free tuition, or reimbursement for tuition by colleges constitutes taxable income either to the child or the parent, the college will assume no responsibility for the taxes, and will make withholding deductions where those are required, either by specific or general ruling, without reimbursement to the faculty members or administrative and professional employees.

VI. Definitions / Resources

- A. GLCA.** Great Lakes College Association
- B. Service Employee.** The International Union, United Automobile, Aerospace and Agricultural Implement Workers of America, UAW and Its Local 2192.
- C. Administrative Assistant.** Oberlin College Office and Professional Employees, Local 502 of the Office and Professional Employees International Union.

VII. Administration

- A.** Notification of intent to use a grant under this program should be made to the Oberlin College Department of Human Resources by February end in the preceding academic year for which the scholarship is to be granted.
- B.** Eligibility will be determined by the Department of Human Resources.
- C.** Payments will be authorized by the Department of Human Resources who will audit the individual's eligibility. the correctness of the grant to be made and the compliance with their rules. It will certify to the Controller's Office the amount to be paid.
- D.** Provisions of the Tuition Scholarship plan for Children are subject to approval and modification by the Board of Trustees.
- E.** Where students attend Oberlin College under this plan, such students shall not be included in the amount of enrollment of students for the purpose of determining faculty-student ratios, and other statistics, for the purpose of determining the number of faculty members and other personnel to be allocated to a department, or for any other such purpose. Thus, the "load" of teaching faculty and administrative and professional staff children is to be carried by the faculty, and is not to be utilized for the purpose of increasing the number of faculty members.

VIII. Related Information / Communication

Any changes to this policy will be communicated to the institution by the Department of Human Resources.

Approval Process [Required]

Frequency of Review: Annually

Review Process: VP for Finance and Administration; Board of Trustees (originally approved)

Necessary Approval Constituents: Board of Trustees