ITEM: Approval of amendments to the Employee Dependent Undergraduate Tuition Assistance Program

COMMITTEE: Finance, Audit and Facilities Planning

RECOMMENDED RESOLUTION: Resolved, That the Marshall University Board of Governors approves the amended Policy No. AA-42, Employee Dependent Undergraduate Tuition Assistance Program, and that the amended policy will be effective for the Fall 2015 semester.

Further Resolved, That the policy is approved as final at the conclusion of the comment period if no substantive comments are received.

STAFF MEMBER: Michael McGuffey, Director, Institutional Research and Planning

“MUBOG AA-42, Employee Dependent Undergraduate Tuition Assistance Program” amends the current AA-42 as described below.

The definition of an eligible employee includes “faculty member, classified employee, or non-classified employee,” but it now specifies the employee must be eligible for membership in a state retirement system rather than eligible to enroll in PEIA health insurance. Since some employees who are not “regular-status” state employees are eligible to enroll in PEIA health insurance, this change makes clear that only state employees are eligible for this benefit. Employees of MURC, Marshall Health, MU Foundation, INTO-Marshall, and other affiliated entities have not been and continue to be not eligible for this benefit as those organizations maintain their own benefits packages.

The 9-hour limitation on combining this benefit with other institutional aid for non-resident and metro students is removed. This requirement created significant burden for the Office of Student Financial Assistance when packaging aid for non-WV students and was inconsistent with normal practices for waiver-based aid. Note: The program is designed to provide the same benefit amount to employees regardless of the residency of the dependent student. For Academic Year 2015-16, the benefit is $2,862 per semester (depending on other institutional aid restrictions) for all student dependents.

Several areas have been updated to match the current tuition and fee structure and clarify certain aspects of the benefit, including stacking with other scholarships.

Fiscal Note: The anticipated additional cost to the institution for implementing this policy is expected to be approximately $10,000 per semester.
Upon approval of this resolution, a comment period will open and remain open until 10:00am on Monday, September 28, 2015. If substantive comments are received, a final policy will be presented to the Board for approval at a subsequent meeting. If no substantive comments are received, the policy will be considered approved in its current form with an effective date of August 26, 2015.

Comments should be sent via paper mail only (USPS mail or campus mail) to:

Michael McGuffey  
Office of the President  
Marshall University  
Huntington, WV 25755
MARSHALL UNIVERSITY BOARD OF GOVERNORS

Policy No. AA-42

EMPLOYEE DEPENDENT UNDERGRADUATE TUITION ASSISTANCE PROGRAM

1 General Information.

1.1 Scope: This policy establishes a tuition assistance program for certain dependents of employees.

1.2 Authority: W. Va. Code §18B-1-6

1.3 Passage Date: April 30, 2009

1.4 Effective Date: April 30, 2009

1.5 History:

1.5.1 This policy modifies MUBOG Policy No. AA-42, Employee Dependent Undergraduate Tuition Assistance Program (effective April 20, 2009), which replaced MUBOG Policy AA-42 Marshall Dependent Scholarships (effective June 28, 2006), which replaced Executive Policy Bulletin No. 14, effective April 26, 2000.

2 Introduction.

2.1 In order to allow students who are dependent children of Marshall University employees to obtain a college degree at the University at a significantly reduced cost to the student and the student’s family, the Marshall University Employee Dependent Undergraduate Tuition Assistance Program (the “program”) will provide a tuition remission benefit to all qualified dependents of eligible University employees.

3 Definitions.

3.1 Eligible Employee: “Eligible employee” is any faculty member, classified employee, or non-classified employee of Marshall University who is employed for 0.53 FTE or greater and who is eligible to enroll for PEIA health insurance, a state employee eligible for membership in a state retirement system of the State of West Virginia or other retirement plan authorized by the state and has been employed by the University continuously in this status for at least one year prior to the beginning of the semester of application for the program. The Office of Human Resources will verify employment status.

3.2 Dependent: “Dependent” includes 1) A natural-born or adopted child of an employee who is twenty-five years of age or younger; or 2) other “qualifying child” of the employee as defined by the Internal Revenue Service, 25 years of age or younger, who has been claimed as a dependent on the employee’s federal income tax return for the two complete tax years immediately preceding the first enrollment in the program. Copies of the Federal Form 1040 (or 1040A) U.S. Individual Income Tax Returns for the appropriate years may be requested to verify dependent status. The Office of Human Resources will verify dependent status.

3.3 Qualified: The dependent of an eligible employee shall be considered “qualified” for the program if the following criteria are met:

3.3.1 The student dependent has been admitted to the University.

3.3.2 The student is a degree-seeking, full-time undergraduate.
3.3.3 The student dependent is making satisfactory academic progress as determined by the Office of Student Financial Assistance (as of passage of this policy, the SAP policy is available see web site at http://www.marshall.edu/sfa; click on “Eligibility”)

3.3.4 The student is not on academic probation.

3.3.5 The student is not on social probation.

3.3.6 The student has applied for the PROMISE scholarship if eligible to receive it.

4 Benefit.

4.1 The program will provide a tuition remission benefit in the amount of the total of the Capital Fee and the Education and General (E&G) Fee for resident students. For non-resident and metro students, the value of the scholarship tuition assistance benefit will be no more than the amount of the two combined fees for resident students.

4.2 For non-resident and metro students, the tuition assistance provided in this program cannot be combined with any other institution-funded tuition waiver-based financial aid assistance to have a total value of more than the amount of Capital and E&G Fees for nine (9) “bill hours” for each semester. There is no limitation on combining the assistance from this program with privately-funded or other non-institution-funded (e.g. Pell Grant, WV state grant program, etc.) financial assistance.

4.3 The program provides the benefit during the fall, spring, and summer terms.

4.4 The student is responsible for Except as provided in Section 5 below, the tuition assistance benefit does not pay for any all-fees other than the Capital and E&G fees waived. These Such other fees include all auxiliary fees, special equity fees, recreation center fees, E-course delivery fees, college/program fees, lab course fees, late fees, etc.

4.5 The program does not provide assistance for books, parking, etc.

5 Alternative Benefit.

5.1 If a program participant is the recipient of a PROMISE Scholarship for payment of tuition or the recipient of any other privately-funded, tuition-only scholarship, then the student may elect to receive an alternative benefit.

5.2 The alternative benefit will take the form of

5.2.1 A remission of the Capital and E&G fees in an amount, up to the amount of the normal benefit received under this program, to A “bridge the gap” remission of the difference between the amount paid by the PROMISE (or other privately-funded) Scholarship (or other privately-funded, tuition-only scholarship) and the total of the mandatory tuition and fees (Capital Fee, E&G Fee, Auxiliary Fee, Special Equity Fee, Rec Center Fee, and college/program fees) that would normally be charged to the student charged to resident students; and

5.2.2 A partial remission of room and board fees to assist in covering the cost of residing in a Marshall University residence hall. The amount of the room-only this remission is equal to the amount of the normal benefit under this program minus any amount used in the “bridge the gap” remission described in part (a5.2.1).

5.2.3 The total received under the Alternative Benefit shall not be more than the amount of the benefit normally received under this program as described in Section 4.1.

6 Change in Employment Status
6.1 In the event of a program-eligible employee’s retirement, total disability, or death after completion of at least ten (10) years of University service, the employee’s dependent(s) will retain initial eligibility for the scholarship tuition assistance program for a period of five (5) years after the event and will retain the full four years of eligibility.

6.2 A program scholarship. The tuition assistance for a semester will be rescinded if, for some reason other than those identified in 6.1 above, the sponsoring employee is not employed by the University on the first day of the semester. Separation from employment during the semester does not affect the scholarship tuition assistance for the current semester.

7 Restrictions

7.1 A student may not participate in the program after four years have elapsed following the student’s first participation in the program. Students withdrawing from the University due to medical, military, or other involuntary reasons may appeal for an extension of the time limit as described in section 8.1 of this policy.

7.2 If a student receives other “institutional” financial assistance, as determined by the Office of Student Financial Aid, the amount of the benefit may be reduced by the amount of the other assistance. In any instance in which a student receives the benefit PLUS one or more other tuition waiver-based financial aid awards, the value of the benefit will be reduced such that the total of all waiver-based awards (including the benefit) is not greater than the total of the student’s Capital Fee and Educational and General Fee.

7.3 The employee must apply for the benefit by the appropriate due dates for each semester.

7.4 The student must meet the qualifications listed in section 3.3 for each semester of application.

7.5 If an application is submitted after the first due date, it will be the student’s responsibility to pay up-front all of the fees due for that semester by the established fee payment deadline.

7.6 The program does not provide benefits retroactively for past semesters.

7.7 The Office of Student Financial Assistance will provide applications and determine all applicable due dates and other application requirements as may be necessary.

8 Appeals

8.1 Appeals of decisions by the Office of Student Financial Assistance regarding this benefit should be made in writing to the Director of Student Financial Assistance within thirty days of the notice of the decision. Appeals will be acted upon by the University Scholarship Policy Committee.

9 Administrative Procedure

9.1 The director of student financial aid is responsible for developing, implementing, and administering a sufficient administrative procedure to effectuate the provisions of this policy.