



**Review of the UMD Policies and Procedures Concerning Tuition Remission  
(Senate Document #19-20-25)**

**TO Wallace D. Loh | President**

**FROM Pamela Lanford | Chair, University Senate**

I am pleased to forward the accompanying legislation for your consideration and approval. Jane Hirshberg, Chair of the Staff Affairs Committee, presented the committee's proposal on Review of the UMD Policies and Procedures Concerning Tuition Remission (Senate Document #19-20-25), which the University Senate approved at its meeting on April 22, 2020. Please inform the Senate of your decision and any administrative action related to your conclusion.

**Approved:**

**Date:**

**04-24-2020**

**Wallace D. Loh  
President**

Copies of this approval and the accompanying legislation will be forwarded to:

- Mary Ann Rankin**, Senior Vice President and Provost
- Reka Montfort**, Executive Secretary and Director, University Senate
- Michael Poterala**, Vice President and General Counsel
- Cynthia Hale**, Associate Vice President for Finance and Personnel
- John Bertot**, Associate Provost for Faculty Affairs
- Elizabeth Beise**, Associate Provost for Academic Planning & Programs
- Sylvia B. Andrews**, Academic Affairs
- Rhonda Smith**, Academic Affairs
- Jewel Washington**, Assistant Vice President, University Human Resources
- Dave Rieger**, Assistant Director for Benefits, University Human Resources
- Jane Hirshberg**, Chair, Staff Affairs Committee



## Review of the UMD Policies and Procedures Concerning Tuition Remission

<b>PRESENTED BY</b>	Jane Hirshberg, Chair
<b>REVIEW DATES</b>	SEC – April 10, 2020   SENATE – April 22, 2020
<b>VOTING METHOD</b>	In a single vote
<b>RELEVANT POLICY/DOCUMENT</b>	<a href="#">VII-4.10(A) Policy and Procedures Concerning Tuition Remission for Faculty and Staff</a> <a href="#">VII-4.20(A) Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff</a>
<b>NECESSARY APPROVALS</b>	Senate, President

### ISSUE

In November 2019, the Senate Executive Committee (SEC) received a proposal calling for the revision of two University policies addressing tuition remission for employees, their spouses, and dependent children. The proposal noted that neither policy has been updated since 1991, and neither accurately reflects current practice or University System of Maryland (USM) policies. In January 2020, the SEC charged the Staff Affairs Committee with reviewing both policies, consulting with relevant stakeholders, reviewing similar policies and procedures at Big 10 and peer institutions, considering whether certain elements of the policies should be aligned with current practice, and recommending changes to the policies, as appropriate.

### RECOMMENDATION

The Staff Affairs Committee recommends that the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University consider reviewing the fees paid by employees who take courses at the institution and determine which should be considered mandatory.

### COMMITTEE WORK

The Staff Affairs Committee consulted University Human Resources on the policies and on current practice regarding tuition remission for employees and their spouses and dependent children. The committee also reviewed USM policies covering tuition remission, and considered policies and procedures at other USM institutions. The committee developed revisions to more closely align with USM policies and current University practice, and that more directly focus on employees at this institution.

The committee also considered the mandatory fees that are charged to employees who take courses, which are the same fees as are charged to undergraduate and graduate students. In some cases, employees have been charged separately for services and privileges that should have been covered by their mandatory fees, due to their dual roles as employees and students. While the USM policy requires that employees pay mandatory fees, the committee noted that it may be possible for the University to consider establishing a new category of mandatory fees that are specific to employees who take courses, which led to the committee's administrative recommendation.

After due consideration, the Staff Affairs Committee voted to approve the revised policies and an administrative recommendation by an email vote concluding on April 6, 2020.

## **ALTERNATIVES**

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The Senate could choose not to approve the revisions to the Policy and Procedures Concerning Tuition Remission for Faculty and Staff and the Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff. However, the University would lose the opportunity to ensure that these policies align with current practice and USM policies.

## **RISKS**

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There are no associated risks to the University in adopting these recommendations.

## **FINANCIAL IMPLICATIONS**

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There are no known financial implications for revising the two policies. There could be financial implications depending on the outcome of the University's review of the recommendation related to mandatory fees paid by employees who take courses.



## Review of the UMD Policies and Procedures Concerning Tuition Remission

### 2019-2020 Committee Members

**Jane Hirshberg** (Chair)  
**Max Balagtas-Badoy** (Non-Exempt Staff Contingent II)  
**Amelia Barabak** (Ex-Officio Provost's Rep)  
**Darrell Claiborne** (Ex-Officio NV CUSS Rep)  
**Jaision Cooper** (Exempt Staff Contingent II)  
**Everett Daviage** (Exempt Staff - Division)  
**Robert DuDonis** (Non-Exempt Staff - Division)  
**Cathy Fisanich** (Non-Exempt Staff - Academic)  
**Sarah Goff** (Ex-Officio CUSS Rep)  
**Elizabeth Hinson** (Ex-Officio NV CUSS Rep)  
**Antionietta Jennings** (Non-Exempt Staff - Division)  
**Rythee Lambert-Jones** (Ex-Officio Director of Human Resources Rep)

**Anne Martens** (Ex-Officio VP Administration & Finance Rep)  
**Kalia Patricio** (Ex-Officio CUSS Rep)  
**Jeanne Pekny** (Non-Exempt - Academic)  
**Brianne Rowh** (Exempt Staff - Division)  
**Margaret Saponaro** (Faculty)  
**Maureen Schrimpe** (Ex-Officio CUSS Rep)  
**Kristin Stenson** (Exempt Staff - Academic)  
**Brooke Supple** (Ex-Officio VP Student Affairs Rep)  
**Timea Webster** (Exempt Staff - Academic)

### Date of Submission

April 2020

## BACKGROUND

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In November 2019, the Senate Executive Committee (SEC) received a proposal calling for the revision of two University policies addressing tuition remission: the Policy and Procedures Concerning Tuition Remission for Faculty and Staff (VII-4.10[A]) and the Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff (VII-4.20[A]). The proposal noted that neither policy has been updated since 1991, and neither accurately reflects current practice or University System of Maryland (USM) policies. In January 2020, the SEC charged the Staff Affairs Committee with reviewing both policies, consulting with relevant stakeholders, reviewing similar policies and procedures at Big 10 and peer institutions, considering whether certain elements of the policies should be aligned with current practice, and recommending changes to the policies, as appropriate (Appendix 3).

## CURRENT PRACTICE

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The University's current policies and its approach to tuition remission align with the general principles and intent of the USM policies, but they have not been updated in thirty years to incorporate revisions to the USM policies that occurred during that period. The USM policies provide broad discretion to each institution to implement specific practices related to tuition remission. University Human Resources' (UHR) practices offer more flexibility and expand access to tuition remission in order to align with USM policies and to reflect evolving trends in education.

## COMMITTEE WORK

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The Staff Affairs Committee consulted with UHR on the revised policy drafts included with the proposal. The committee gathered information on how tuition remission is currently administered for employees, their spouses, and their dependent children, and identified key elements of the current policies that should be revised. The committee worked to identify differences between the University's

current policies and the corresponding USM policies, and between the University's current policies and UHR's practice surrounding tuition remission.

The major differences between the University's policies and the USM policies include:

- The USM policy covering employees provides remission of up to 8 credits per semester. The University policy for employees remits up to 7 credits per semester.
- Dependents and spouses are required to pay mandatory fees. The University policy for spouses and dependents does not address fees.

The major differences between the University's policies and UHR's practice surrounding tuition remission include:

- UHR provides remission for credits taken during winter and summer sessions, and for twelve-week courses. The University policy for employees only allows remission during "semesters."
- UHR provides remission for up to 8 credits over the course of the summer sessions. The University policy for employees remits up to 6 over the two sessions.
- UHR provides remission for eligible CII employees. The University policy for employees does not permit remission for CII employees.
- UHR provides remission for the entirety of differential tuition for undergraduate courses. The University policies do not address differential tuition.
- The University policies do not indicate under what circumstances an employee, their spouse, or their dependent is required to reimburse tuition remission if the employee leaves the University. UHR requires employees to reimburse the institution if they leave the University before the drop/add deadline for the relevant term.
- For graduate courses, UHR only remits tuition based on the standard graduate credit hour, and students are responsible for any tuition costs above that. The University policy for employees only addresses the number of credits covered by tuition remission, while the policy for spouses and dependents references "100% tuition remission" for graduate courses.
- UHR provides tuition remission for winter terms (4 credits for the standard term, 6 for the twelve-week term). UHR also provides remission for courses taken over the summer sessions (8 over the course of the two sessions). The University policy for employees only references semesters, while the policy for spouses and dependents does not address semesters or terms at all, and instead indicates that it provides "100% tuition remission."

The committee reviewed similar tuition remission policies and procedures at other institutions. Given that the Senate's ability to propose changes is constrained by the USM policies, and given the limited scope of its charge, the committee decided to focus its peer research on similar policies at other USM institutions. Nearly all of those institutions simply reference the USM policies. Of the two institutions that do have standalone policies, neither includes a level of detail approaching that of the University's current policies. Rather than following approaches taken by other USM institutions, the committee revised the proposed drafts by adapting language from the USM policies, framing them to be more

applicable to employees at this institution, and aligning them with current UHR practices as described above. The committee also struck references to graduate assistants in the University policy for employees, as remission for graduate assistants is now addressed by the USM Policy on Graduate Assistants (III-7.11).

The committee also considered the fees that are charged to employees who take courses at the University. In the past, the University has waived mandatory fees for employees. In 2019, the USM announced that this practice was not permitted under the USM policy covering tuition remission for employees; since fall 2019, employees have been responsible for paying mandatory fees. Committee members reported instances of employees being charged separately for services and privileges that should have been covered by their mandatory fees, due to their dual roles as employees and students. At present, the University has two categories of “mandatory fees,” one for [undergraduate students](#) and one for [graduate students](#). Committee members noted that some of the fees within each category are not applicable to faculty and staff who are taking classes. The USM policy requires that faculty and staff who take courses pay mandatory fees. However, the committee noted that it may be possible for the University to consider which fees should be considered mandatory for employees who take courses, which led to the committee’s administrative recommendation.

The revised policies were reviewed by UHR, the Office of the Registrar, the Graduate School, and the Office of General Counsel, none of whom had concerns. After due consideration, the Staff Affairs Committee voted to approve the revised policies and an administrative recommendation by an email vote concluding on April 6, 2020.

## RECOMMENDATIONS

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The Staff Affairs Committee recommends that the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff be revised as indicated in the document immediately following this report.

The Staff Affairs Committee recommends that the University consider reviewing the fees paid by employees who take courses at the institution and determine which should be considered mandatory.

## APPENDICES

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Appendix 1—Current Policy and Procedures Concerning Tuition Remission for Faculty and Staff (VII-4.10[A])

Appendix 2—Current Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff (VII-4.20[A])

Appendix 3—Charge from the Senate Executive Committee



**VII-4.10(A) UNIVERSITY OF MARYLAND POLICY ON TUITION REMISSION FOR FACULTY, STAFF, AND RETIRED EMPLOYEES**  
(Approved by the President August 1, 1991)

**I. Purpose**

The University of Maryland (the University) supports the continuing education of current and retired faculty and staff by providing tuition remission to enroll in academic courses for the improvement of skills or for personal development.

**II. Definitions**

- A. "Differential Tuition" means an additional amount charged on top of base tuition for specific undergraduate academic programs.
- B. "Employee" means a regular status faculty member, a regular staff member, or a Contingent II staff member who occupies a position at the University that is intended to last at least six months and is at least 50% FTE.
- C. "Retiree" means a person who has previously held a regular status faculty or staff position within the USM, and who is receiving a periodic distribution from the Maryland State Retirement and Pension System and/or a Maryland Optional Retirement Plan. Retirees who enrolled in a retirement plan prior to July 1, 2011, must have earned at least five years' FTE of USM service credit to be eligible for Tuition Remission under this policy. Retirees who enrolled in a retirement plan on or after July 1, 2011, must have earned at least ten year's FTE of USM service credit.
- D. "Tuition Reimbursement" means repayment for certain tuition costs.
- E. "Tuition Remission" means the waiver of tuition, including Differential Tuition, charged for undergraduate academic courses, and the waiver of the standard graduate credit hour for graduate courses.

**III. Policy**

- A. Number of Credits
  - 1. Full-time Employees and Retirees from full-time positions are entitled to receive Tuition Remission for courses taken at the University as follows:
    - a. 8 credits each for the fall and spring semesters

- b. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
  - c. 8 credits over the course of both the Summer I and Summer II sessions
2. Part-time Employees and Retirees from part-time positions are entitled to Tuition Remission for credits prorated to their percentage of time worked.
  3. Audit courses and non-credit courses will be assigned the equivalent number of hours in determining the number of hours which may be carried, and the number of hours for which tuition may be remitted.
  4. The maximum total number of hours of Tuition Remission available at the University shall be determined by the Senior Vice President and Provost.

#### B. Eligibility

1. Enrollment in a course at the University is subject to the individual's admissibility to the University based on normal admission standards, and the fulfillment of all course prerequisites.
2. Tuition Remission for courses taken at other USM institutions shall be subject to the Employee or Retiree's admissibility to the institution and to the program in which the courses are to be taken, including other academic regulations of the institution governing student enrollment.
3. In order to ensure the operations of the University, enrollment in daytime courses by Employees requires the permission of their unit head.

#### C. Tuition Reimbursement

1. Employees may be reimbursed for the cost of tuition upon successful completion of a course offered by a two-year or four-year institution that does not participate in the USM tuition remission program if:
  - i. the Employee's unit head determines that a specific course is job-related and will contribute to the Employee's job performance;
  - ii. the course is not available at any institution that participates in the USM tuition remission program; and
  - iii. operations and resources permit the Employee's enrollment in and reimbursement for the course.
2. Tuition Reimbursement for courses taken at institutions that do not participate in the USM tuition remission program are subject to the following limitations:
  - i. The maximum reimbursement per semester shall be for one course, not to exceed 4 credit hours.



- ii. An Employee may not enroll in more than 8 credit hours of coursework in a semester for which the Employee is receiving a combination of Tuition Reimbursement and Tuition Remission.
  - iii. Graduate course reimbursement may be limited to the amount currently charged for a graduate credit hour at the University.
3. The Employee's unit head must submit a written reimbursement recommendation to the Assistant Vice President for Human Resources before the first class meeting of the recommended course. Advance approval of the Assistant Vice President for Human Resources or designee is required in order for the Employee to receive Tuition Reimbursement.
4. The Employee is responsible for paying tuition and related fees to the institution offering the approved course.
5. To be eligible for reimbursement, Employees must earn a grade of "C" or better in the course.
6. Upon successful completion of the course, the Employee must submit a request for Tuition Reimbursement, documenting the tuition amount to be reimbursed and the Employee's grade.

#### D. Absence from Work to Attend Class

1. If enrollment in a course is required by an Employee's unit head, the Employee may be absent from work for not more than one-half day on days when classes are scheduled. The Employee will not be required to make up for time away from work to attend class.
2. If enrollment in a course is not mandatory, the Employee should enroll in a class that meets during non-work hours, if feasible. The Employee must either take leave or make up for any hours of work lost for a course that is not required by their unit head.

#### E. Fees & Costs

1. Employees and Retirees are responsible for the payment of all mandatory fees for courses taken at the University or elsewhere.
2. Employees and Retirees will be responsible for the differential cost between each credit hour and the amount currently charged for a graduate credit hour at the University.
3. If an Employee who has received Tuition Remission in a given term leaves the University prior to the end of the drop/add period for that term, the Employee will be financially responsible for the full cost of the tuition.



**VII-4.20(A) UNIVERSITY OF MARYLAND POLICY ON TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF FACULTY, STAFF, AND RETIRED EMPLOYEES**

(Approved by the President August 1, 1991)

**I. Purpose**

In order to better support its current and former employees and advance its commitment to providing exceptional educational opportunities to residents of the state of Maryland, the University of Maryland (the University) provides tuition remission for the spouses and dependent children of current and retired faculty and staff.

**II. Definitions**

- A. "Dependent Child" means the child, stepchild, or legally adopted child of a University Employee or Retiree who:
  - 1. is under the age of twenty-six prior to an institution's course registration deadline for the semester or term for which Tuition Remission has been requested; or
  - 2. is twenty-six or older and claimed as a dependent on the Employee or Retiree's federal income tax return for the year(s) in which Tuition Remission is granted.
- B. "Differential Tuition" means an additional amount charged on top of base tuition for specific undergraduate academic programs.
- C. "Employee" means a regular status faculty or staff member who occupies a position at the University that is intended to last at least six months and is at least 50% FTE.
- D. "Retiree" means a person who has previously held a regular status faculty or staff position at the University and who is receiving a periodic distribution from the Maryland State Retirement and Pension System and/or a Maryland Optional Retirement Plan. Retirees who enrolled in a retirement plan prior to July 1, 2011, must have earned at least five years' FTE of University System of Maryland (USM) service credit in order to be eligible for Tuition Remission. Retirees who enrolled in a retirement plan on or after July 1, 2011, must have earned at least ten year's FTE of USM service credit.
- E. "Spouse" means a person in a marriage recognized by the state of Maryland, with an Employee or Retiree.
- F. "Tuition Remission" means the waiver of tuition, including Differential Tuition,

charged for undergraduate academic courses, and the waiver of the standard graduate credit hour for graduate courses.

### **III. Policy**

Spouses and Dependent Children of Employees and Retirees may receive Tuition Remission subject to the following provisions.

#### **A. Eligibility for Tuition Remission**

1. Spouses and Dependent Children of full-time Employees or Retirees hired before January 1, 1990, are entitled to receive 100% Tuition Remission for undergraduate or graduate courses taken at any USM institution. Tuition remission for undergraduate and graduate courses taken at the University is granted as follows:
  - i. Unlimited Tuition Remission for fall and spring semesters
  - ii. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
  - iii. 8 credits total for both Summer I and Summer II sessions
2. Spouses and Dependent Children of full-time Employees or Retirees hired on or after January 1, 1990, are entitled to receive Tuition Remission under the following conditions:
  - i. The student will receive 100% Tuition Remission for courses taken toward a first undergraduate degree as follows:
    - a. Unlimited Tuition Remission for fall and spring semesters
    - b. 4 credits for the standard winter term and 6 credits for a twelve-week winter term
    - c. 8 credits total for both Summer I and Summer II sessions
  - ii. The student will receive 50% Tuition Remission for undergraduate courses taken toward a first undergraduate degree at another USM institution to which the student has been accepted. The remaining 50% of tuition costs are the responsibility of the student.
  - iii. Employees hired on or after July 1, 1992, are not eligible for Tuition Remission for their Spouses or Dependent Children until they have been employed by the University for at least two years.
3. Spouses and Dependent Children of Employees and Retirees of the University of Maryland Extension, the Agricultural Experimental Station, and the former University of Maryland Biotechnology Institute will receive 100% Tuition Remission for courses

taken toward a first undergraduate degree at any USM institution.

4. If a former USM Employee is rehired by the University within three years of separation from prior USM employment, the Spouse and Dependent Children of the rehired Employee will be eligible for Tuition Remission according to the Employee's original USM hire date under the terms provided for in Section III.A.1-2 above.
5. For Spouses and Dependent Children of University Employees and Retirees who are employed in, or retired from, a position at 50% or more time, the percentage of tuition remitted will be proportional to the percentage of employment service.

#### B. Admissibility

1. Tuition Remission is subject to the Spouse or Dependent Child's admissibility to the University or USM institution and to the program in which the courses are offered, and to other academic regulations governing student enrollment.

#### C. Tuition Remission and Deceased University Employees and Retirees

1. Subject to the requirements and limitations of this policy, Spouses and Dependent Children of full-time Employees or Retirees who die while employed or after retirement will be permitted to register for courses with Tuition Remission.
2. The number of years of allowable Tuition Remission is dependent on the Employee or Retiree's years of USM service. Spouses and Dependent Children will receive Tuition Remission for:
  - i. one academic year, if the Employee or Retiree was employed with the USM for less than three years;
  - ii. two academic years, if the length of employment was at least three but less than five years;
  - iii. three academic years, if the length of employment was at least five but less than seven years;
  - iv. four academic years, if the length of employment was at least seven but less than nine years; and
  - v. five academic years, if the length of employment was nine years or more.
3. For Spouses, eligibility for Tuition Remission will continue for a maximum period of seven years after the Employee or Retiree's death.
4. For children, eligibility will continue as long as the child of the deceased Employee or Retiree qualifies as a "Dependent Child" under Section II.A.
5. For Spouses and Dependent Children of part-time Employees or Retirees who were employed at 50% time or more and who die while employed or after retirement, the

percentage of Tuition Remission will be proportional to the percentage of employment service averaged for the three years immediately preceding the Employee's retirement or death.

#### D. Fees & Costs

1. Individual students are responsible for the payment of all mandatory fees for courses taken at the University or elsewhere under the terms of this policy.
2. For the Spouses and Dependent Children of Employees and Retirees identified in III.A.1., individual students will be responsible for the differential cost between each credit hour and the amount currently charged for a graduate credit hour at the University.
3. If an Employee who has received Tuition Remission in a given term for a Spouse or Dependent Child leaves the University prior to the end of the drop/add period for that term for any reason other than those addressed in III.C., the Employee will be financially responsible for the full cost of the tuition.

## Appendix 1: Current Policy and Procedures Concerning Tuition Remission for Faculty and Staff (VII-4.10[A])



### **VII-4.10(A) UMCP Policy and Procedures Concerning Tuition Remission for Faculty and Staff**

(Approved by the President August 1, 1991)

#### I. Policy

UMCP encourages and supports University faculty, staff, and retirees, both on the College Park Campus and within the University of Maryland System, to make use of the opportunity to enroll in academic courses at UMCP. Tuition remission is available to those choosing to do so in accordance with the Board of Regent's Policy VII-4.10, University of Maryland System Policy on Tuition Remission for Faculty and Staff, and the following guidelines and procedures.

#### II. Entitlement

Permanent faculty and permanent staff from all institutions within the University of Maryland System, including retirees from permanent positions, are entitled to tuition remission benefits at UMCP.

#### III. Definitions

1. Permanent faculty or staff shall mean a person who occupies a position within the University of Maryland System through approved budgetary and appointment procedures with the intent that such appointment is for a duration of at least six months.
2. University of Maryland Retiree shall mean a person who has previously held a permanent position within the University of Maryland System, and is receiving State of Maryland retirement checks and/or TIAA-CREF retirement checks. Retirees must have earned at least five years of University of Maryland System service credit.

#### IV. Guidelines

1. Admissibility to a course at UMCP shall be subject to an individual's admissibility to UMCP based upon normal admission standards. All course prerequisites must be fulfilled.
2. Audit courses and non-credit courses shall be assigned the equivalent number of hours in determining the number of hours which may be carried, and the number of hours for which fees may be remitted.
3. In order to ensure the operations of the University of Maryland System, enrollment in daytime credit courses by active University of Maryland System employees is subject to the consent of the appropriate director or department chairperson and approval of the Vice President for Administrative Affairs of the appropriate institution.

4. Employees from other University of Maryland System institutions shall be given the same opportunity for enrollment in courses on the College Park Campus under the tuition remission policy as their counterparts at UMCP.
5. Questions concerning an individual's status at another campus for purposes of tuition remission shall be directed to the appropriate campus' Department of Personnel by the UMCP Personnel Services Department.
6. The maximum number of hours of tuition remission available at UMCP shall be determined by the Administration each semester, based on budget constraints.

#### IV. Credit Hour Remission Entitlements

1. Full-time faculty, full-time staff and retirees from full-time positions shall be permitted to register for no more than two courses, not to exceed seven credits per semester with remission of tuition.
2. Permanent part-time faculty and staff employed at least fifty percent of the time in the University of Maryland System or retirees from such positions are permitted remission for credits proportional to their percentage of service.
3. Faculty, staff, and retirees are responsible for the payment of registration fees.
4. Graduate Assistants are permitted to register for not more than ten credits per semester with remission of tuition.
5. Graduate Fellows are permitted to register for not more than fifteen credits per semester with remission of tuition.
6. Graduate Assistants and Graduate Fellows must pay all mandatory fees.
7. Full-time faculty, staff and retirees are permitted to register for three credits per summer session with remission of tuition. Twelve month graduate assistants are permitted to register for four credits for the total summer session with tuition remission.

#### V. Procedure for Requesting Tuition Remission

1. An "Authorization of Remission of Tuition" form must be completed and submitted to the UMCP Department of Personnel. The form is available in the Staff Benefits Office of the Personnel Services Department, and through the personnel offices at all University of Maryland System institutions.
2. The "Authorization of Remission of Tuition" form must be submitted to the Department of Personnel in a sealed envelope.
3. The form must be received by the Staff Benefits Office no later than the published deadline for each semester.



**VII-4.20(A) UMCP PROCEDURES CONCERNING TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF FACULTY AND STAFF**  
(Approved by the President August 1, 1991)

A. Eligibility

Tuition remission is available to spouses and dependent children of:

Permanent faculty at UMS,  
Permanent staff at UMS, and  
University of Maryland System retirees

who are admissible to UMCP under normal admission standards. Different tuition remission benefits apply to employees based on the date that employment began. These differences, as mandated by the Board of Regents are as follows:

1. Employment beginning before January 1, 1990-
  - Spouses and dependent children of employees of any UMS institution may register for courses at UMCP with 100% tuition remission at both the undergraduate and graduate levels.
2. Employment beginning on or after January 1, 1990-
  - Spouses and dependent children of UMCP employees only may receive 100% tuition remission on courses towards a first undergraduate degree.
  - Spouses and dependent children of employees at other UMS institutions may register for courses at UMCP with 50% tuition remission with the approval of the chief executive officer of the home institution.
  - Spouses and dependent children of University of Baltimore employees may receive 100% tuition remission for freshman and sophomore years.
  - Spouses and dependent children of UMAB employees may receive 100% tuition remission for programs not offered at that campus.

B. Definitions

1. Permanent faculty or staff shall mean a person who occupies a position within the University of Maryland System through approved budgetary and appointment procedures with the intent that such appointment is for a duration of at least six months.
2. University of Maryland System retiree shall mean a person who has previously held a permanent position within the University of Maryland System, and is receiving State of



Maryland retirement checks and /or TIAA/CREF retirement checks. Retirees must have at least five years of University of Maryland System service credit.

3. Spouse shall mean one with whom the employee has entered a legally effective marriage. This does not include an estranged spouse maintaining a separate domicile.
4. Child shall mean a son, daughter, stepson, stepdaughter, legally adopted son, or legally adopted daughter.
5. Dependent child shall mean a child who is financially dependent under the definition adhered to by the Internal Revenue Service.

#### C. Application Procedure

1. Students seeking to be enrolled at UMCP under the tuition remission program must first apply and be admitted using the admission standards and deadlines for admission which apply to all UMCP applicants. Specific program requirements shall be followed where appropriate.
2. Upon acceptance at UMCP, a completed "Request for Remission of Tuition" form should be submitted to either the Office of Undergraduate Admissions, or the Office of Graduate Admissions, as appropriate.
3. Tuition remission decisions shall be made by the dean of the Undergraduate or Graduate Schools, as appropriate, or by a designee. Tuition remission shall be granted on a first-come-first-served basis to students meeting the criteria set forth above and in the policy of the Board of Regents (VII-4.20). The place of employment of the student's parent or spouse is not a factor. Tuition remission shall not be granted unless all pertinent information requested on the form is supplied.
4. Students shall be notified of the decision to grant or deny tuition remission within thirty days of receipt of the request.



## Review of the UMD Policies and Procedures Concerning Tuition Remission (Senate Document #19-20-25)

Staff Affairs Committee | Chair: Jane Hirshberg

The Senate Executive Committee (SEC) and Senate Chair Lanford request that the Staff Affairs Committee review the proposal entitled, "*Review of the UMD Policies and Procedures Concerning Tuition Remission.*"

Specifically, the Staff Affairs Committee should:

1. Review the Policy on Tuition Remission and Tuition Reimbursement for Regular and Retired Nonexempt and Exempt Staff and Faculty Employees of the University System of Maryland ([VII-4.10](#)).
2. Review the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)).
3. Review the University System of Maryland (USM) Policy on Tuition Remission for Spouse and Dependents ([VII-4.20](#)).
4. Review the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)).
5. Review similar policies or procedures on tuition remission for employees and their spouse/dependents at Big 10 and other peer institutions.
6. Consult with the proposer, the Assistant Director of Employee Benefits in University Human Resources.
7. Consult with a representative of University Human Resources.
8. Consult with a representative of the Vice President for Administration and Finance on the types of fees that are charged to employees who take courses at the University.
9. Consult with a representative of the Senior Vice President & Provost.
10. Consult with a representative of the Graduate School.
11. Consult with a representative of the Office of the Registrar.
12. Consider whether the University's policies on tuition remission need to be aligned with provisions in the USM tuition remission policies.
13. Consider whether the University's policies on tuition remission should be revised to accommodate varying course formats.

14. Consider whether the University's policies on tuition remission should be revised to align with current practices not currently reflected in the policy, including the use of tuition remission during winter and summer sessions.
15. Consult with a representative of the Office of General Counsel on any proposed changes to the University's policy.
16. If appropriate based on the committee's consideration of the above items, recommend whether the policies should be revised.

We ask that you submit a report to the Senate Office no later than **March 30, 2020**. If you have questions or need assistance, please contact Reka Montfort in the Senate Office at [reka@umd.edu](mailto:reka@umd.edu) or 301.405.5804.

**Review of the Policies and Procedures Concerning Tuition Remission**

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**DESCRIPTION OF ISSUE**

The University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)) has not been revised since 1991. It is out of alignment with the Policy on Tuition Remission and Tuition Reimbursement for Regular and Retired Nonexempt and Exempt Staff and Faculty Employees of the University System of Maryland ([VII-4.10](#)), and does not recognize evolving trends in higher education in which courses are offered in formats outside of the traditional academic semesters (fall and spring). The policy also does not align with our current practice of providing tuition remission for courses taken during the winter and summer terms. In addition, the associated University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)) has not been updated since 1991 and is similarly out of alignment with USM Policy on Tuition Remission for Spouse and Dependents ([VII-4.20](#)).

**DESCRIPTION OF CHANGE YOU WOULD LIKE TO SEE**

Revise the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)) and the associated University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)) to align with USM policy and current UMD practice, and to allow for varying course formats.

**SUGGESTION FOR HOW YOUR PROPOSAL WOULD BE PUT INTO PRACTICE**

The revised policy would support the implementation of new systems for requesting and approving tuition remission requests that UHR has already put in place.

**ADDITIONAL INFORMATION**

Proposed revisions to the policies are attached.

## **VII-4.10(A) UNIVERSITY OF MARYLAND POLICY AND PROCEDURES CONCERNING TUITION REMISSION FOR FACULTY, STAFF, AND RETIREES**

### **I. PURPOSE AND APPLICABILITY**

The University of Maryland (UMD) encourages and supports University faculty, staff, and retirees, both on the College Park Campus and within the University System of Maryland (USM), to make use of the opportunity to enroll in academic courses. Tuition remission is available to those choosing to do so in accordance with the Board of Regent's Policy VII-4.10, POLICY ON TUITION REMISSION AND TUITION REIMBURSEMENT FOR REGULAR AND RETIRED NONEXEMPT AND EXEMPT STAFF AND FACULTY EMPLOYEES OF THE UNIVERSITY SYSTEM OF MARYLAND, and the following guidelines and procedures.

### **II. ELIGIBILITY**

Regular Status faculty and staff from all institutions within the University System of Maryland, including retirees from regular status positions, are entitled to tuition remission benefits at UMD.

### **III. DEFINITIONS**

1. Regular status faculty or staff shall mean a person who occupies a position within the University System of Maryland through approved budgetary and appointment procedures, with the intent that such appointment is for a duration of at least six months.
2. A University of Maryland retiree shall mean a person who has previously held a regular status position within the University System of Maryland, and must be receiving a periodic distribution from the State of Maryland Retirement and Pension System and/or a Maryland Optional Retirement Plan (ORP). Retirees enrolled in a retirement plan prior to July 1, 2011 must have earned at least five years' full time equivalent (FTE) of University System of Maryland service credit. Retirees enrolled in a retirement plan July 1, 2011 or later must have earned at least ten year's full time equivalent (FTE) of University System of Maryland service credit.

### **IV. ADMINISTRATION OF TUITION REMISSION**

1. Admissibility to a course at UMD shall be subject to UMD normal admission standards. All course prerequisites must be fulfilled.
2. Audit courses and non-credit courses shall be assigned the equivalent number of hours in determining the number of hours which may be carried, and the number of hours for which tuition may be remitted.
3. In order to ensure the operations of the University of Maryland, enrollment in daytime credit courses by active University of Maryland employees is subject to the consent of the appropriate director or department chairperson.

4. Employees from other University System of Maryland institutions shall be given the same opportunity for enrollment in courses on the College Park Campus under the tuition remission policy as their counterparts at UMD.
5. Tuition remission at other USM institutions shall be subject to the individual's admissibility to the institution and to the program in which the courses are to be taken, including other academic regulations of the institution governing student enrollment (for example, course prerequisites and registration deadlines).
6. The maximum number of hours of tuition remission available at UMD shall be determined by the Administration, based on budget constraints.

#### IV. CREDIT HOUR REMISSION ENTITLEMENTS

1. Full-time faculty, staff, and retirees from full-time positions shall be permitted to receive tuition remission for courses taken at UMD as follows:
  - 8 credits each for Fall and Spring semester
  - 4 credit for the standard Winter term and 6 credits for a 12-week Winter term
  - 8 credits combined total for Summer I and Summer II sessions.

Tuition remission for courses taken at other USM institutions will follow that institution's restrictions and guidelines.

2. Regular status part-time faculty and staff employed at least fifty percent (50%) of full-time or retirees from such part-time positions are permitted tuition remission for credits prorated to their percentage of time worked.
3. Faculty, staff, and retirees are responsible for payment of all mandatory fees.

#### V. PROCEDURE FOR REQUESTING TUITION REMISSION

1. All tuition remission applications for all USM institutions must be submitted through the online University System of Maryland Tuition Remission Application Portal. Portal access is available through the University Human Resources website.
2. Applications must be submitted no later than the published deadline for each semester or term.

#### VI. TUITION REIMBURSEMENT AT NON-USM OR NON-RECIPROCAL INSTITUTIONS

##### A. Eligibility for Tuition Reimbursement

Subject to the requirements of this Section, an eligible full-time employee may be reimbursed for the cost of tuition upon successful completion of a course offered by non-USM or non-Reciprocal two- or four-year institution if:

1. That employee's department head or chair determines that a specific course is job-related and will contribute to the employee's job performance.

2. The course is not available as a practical matter at any USM or reciprocal Institution; and
3. Operations and resources permit the employee's enrollment in and reimbursement for the course.

#### B. Administration of Tuition Reimbursement

1. The employee's department head or chair shall submit a written reimbursement recommendation to the UMD Chief Human Resources Officer (CHRO) before the first class meeting of the recommended course. The advance approval of the CHRO is required in order for the employee to receive reimbursement for the course.
2. The employee is responsible for paying tuition and related fees to the institution offering the approved course.
3. Upon successful completion of the course, the employee shall submit a request for reimbursement, documenting the tuition amount to be reimbursed and the employee's receipt of a grade of "C" or better in the course.

#### C. Limitations on Tuition Reimbursement

Tuition reimbursement for courses at non-USM or non-Reciprocal institutions is limited as follows:

1. The maximum reimbursement per semester shall be for one course, not to exceed four credit hours.
2. Course fees and expenses other than tuition are the responsibility of the employee.
3. An employee may not enroll in more than eight credit hours of coursework in a semester for which the employee is receiving a combination of tuition reimbursement under this Section and tuition remission under Section III of this policy.
4. The amount to be reimbursed per credit hour for an approved course may be limited to amount currently charged for a graduate credit hour at the University of Maryland, College Park.

#### D. Absence from Work to Attend Class.

1. If enrollment in a course is required by the employee's department, the employee may be absent from work for not more than one-half day on days when classes are scheduled. The employee will not be required to make up for time away from work on class days.
2. If enrollment in such a course is not mandatory, the employee should enroll in a class that meets during non-work hours, if feasible. The employee must either take leave or make up for any hours of work lost for a course that is not required by the employee's department.

## VII-4.20(A) UNIVERSITY OF MARYLAND PROCEDURES CONCERNING TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF FACULTY AND STAFF

### I. PURPOSE AND APPLICABILITY

The University of Maryland (UMD) supports the general policy of tuition remission for the spouses and dependent children of UMD Faculty and Exempt and Nonexempt Staff Employees on Regular or Retired Status, consistent with the University System of Maryland (USM) Board of Regents Policy VII-4.20 - POLICY ON TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF USM EMPLOYEES AND RETIREES

### II. DEFINITIONS

For the purposes of this policy, the following definitions apply:

A. Dependent Child: The son/daughter, stepson/stepdaughter or legally adopted son/daughter of a UMD Employee or Retiree who:

1. Is under the age of 26 prior to the institution's deadline for registration for courses in the semester or term for which tuition remission has been requested, or,
2. If the child is 26 or older, is claimed as a dependent on the employee's federal income tax return for the year(s) in which tuition remission is granted.

B. Spouse: A person in a legally contracted marriage recognized by the State of Maryland to a UMD Employee or Retiree, with the exception of an estranged spouse who maintains a separate domicile.

C. Retiree: A former UMD Employee who:

1. Is receiving State of Maryland retirement checks and/or Optional Retirement Plan (ORP) periodic distribution, and
2. Was enrolled in a retirement plan prior to July 1, 2011 having earned at least five years' full time equivalent (FTE) of University System of Maryland service credit or was enrolled in a retirement plan July 1, 2011 or later having earned at least ten year's full time equivalent (FTE) of University System of Maryland service credit.

D. UMD Employee: A Faculty or Staff employee on Regular Status who works in a position that:

1. Has been approved through the budgetary and pertinent appointment classification processes; Is intended to last six months or more regardless of the nature of the source of funds or who has retired from such a position; and
2. Which may be on either a full-time basis or a part-time basis of at least 50% FTE.



### III. ADMINISTRATION

This program shall be administered by the constituent institutions as follows:

#### A. General Eligibility.

Tuition remission is extended to the spouses and dependent children of all UMD Employees and Retirees, as defined above, on an equitable basis, subject to the requirements and limitations of this policy.

#### B. Scope of the Benefit.

1. Tuition remission for spouses and dependent children of UMD Employees that attend UMD and are enrolled in undergraduate programs is granted as follows:

- a. Unlimited remission for Fall and Spring semesters.
- b. 6 credits for Winter term.
- c. 8 credits combined total for Summer I and Summer II sessions.
- d. All differential tuition for undergraduate programs in Business, Computer Science, and Engineering

2. Tuition remission for spouses and dependent children of UMD Employees hired before January 1, 1990 that attend UMD and are enrolled in graduate programs is granted as follows:

- a. Unlimited remission for Fall and Spring semesters.
- b. 6 credits for Winter term.
- c. 8 credits combined total for Summer I and Summer II sessions.

3. Tuition remission for eligible spouses and dependent children of UMD Employees, as defined in Section IV of this policy, that attend other USM institutions and are enrolled in undergraduate or graduate programs, should consult with those institutions regarding the granting of tuition remission for those programs.

4. Tuition remission does not include mandatory fees or surcharges, which remain the responsibility of the individual student.

#### C. Academic Requirements

The availability of the benefit of tuition remission shall be subject to the individual's admissibility to the institution and to the program in which the courses are offered and to the other academic regulations governing student enrollment.

#### D. Part-time UMD Employees and Retirees

For spouses and dependent children of UMD Employees and Retirees who are employed in, or retired from a position at fifty percent or more time, the percentage of tuition remitted shall be proportional to the percentage of employment service.

#### E. Exempted Programs of Study.

##### 1. Programs of study that are exempted from this benefit shall include:

- a. The M.D. and D.D.S. programs at the University of Maryland, Baltimore;
- b. Self-support programs and courses, unless the President of the institution has recommended and the Chancellor has approved, that the benefit be available for such a program.
- c. Other programs recommended for exemption, or limitation on the amount of tuition remission, by the President of the institution offering the program and approved by the Chancellor.

#### F. Application for Tuition Remission.

Each UMD Employee or Retiree seeking tuition remission for a spouse or dependent child shall complete an application through the University System of Maryland Tuition Remission Application Portal, with accompanying certification, that provides the information necessary to comply with both this policy and Internal Revenue Service regulations regarding the income tax law status of the tuition remission benefit requested by the Employee.

#### IV. LIMITATIONS BASED ON DATE OF EMPLOYMENT

##### A. Spouses and Dependent Children of UMD Employees and Retirees Whose Employment Began before January 1, 1990.

1. The Spouses and Dependent Children of UMD Employees and Retirees whose appointment was made or whose contractual arrangements were completed before January 1, 1990, may register for courses at any of the institutions of the USM, with 100% tuition remitted at both the undergraduate and graduate level, subject to the restrictions in this policy.

##### B. Spouses and Dependent Children of UMD Employees and Retirees Whose Employment Began on or after January 1, 1990 and before July 1, 1992.

Tuition remission benefits for such employees are provided as follows:

1. Applicable Programs and Courses Tuition remission is only available for courses and programs at the undergraduate level, and shall not apply to courses at the graduate or post-baccalaureate level.

##### 2. Degree-Granting Institutions

- a. Spouses and dependent children of UMD Employees or Retirees may receive full tuition remission of one hundred percent (100 %) on courses toward a first undergraduate degree at UMD.
- b. Such spouses and dependent children may attend another institution of the USM to which the student has been accepted with 50% tuition remission. The remaining 50% of tuition cost is the responsibility of the individual student.

### 3. Special Circumstances and Limitations

a. Non-Degree Granting Institutions: Spouses and dependent children of USM Employees or Retirees from a non-degree granting institution may register for courses toward a first undergraduate degree at any institution of the USM with full (100%) tuition remission.

b. University of Maryland Extension (UME) and Agricultural Experimental Station (AES): Spouses and dependent children of the UME and the AES may receive full tuition remission toward a first undergraduate degree at any USM institution with full (100%) tuition remission.

#### C. Spouses and Dependent Children of USM Employees and Retirees Whose Employment Began on or after July 1, 1992

Tuition remission benefits for the spouses and dependent children of USM Employees and Retirees whose employment began on or after July 1, 1992 shall be available:

1. Consistent with the requirements and limitations in Paragraph IV.B, above, and
2. After the employee has been employed by UMD or USM for two years prior to the institution's deadline for registration in courses for the semester under consideration.

#### D. Effect of Break in Service

If a former UMD employee is rehired by a USM institution within three years of termination from prior UMD employment, the spouse and dependent children of the rehired employee shall be eligible for tuition remission, as provided in Section IV. A. through C. above, according to the employee's original UMD hire date.

#### E. Tuition Remission for Spouses and Dependents of Employees and Retirees that Reside Out-of-State.

Tuition remission charges to institutions and employees under this policy shall be at the in-state tuition rate, regardless of the state of residence of the eligible employee or retiree.

### V. BENEFITS FOR SPOUSES AND DEPENDENT CHILDREN OF DECEASED UMD EMPLOYEES AND RETIREES

Subject to the requirements and limitations of this policy, spouses and dependent children of fulltime UMD Employees or Retirees who die in service or after retirement, shall be permitted to register for courses with tuition remission as follows:

#### A. Extent of Tuition Remission Benefits

The number of years of allowable tuition remission for an eligible spouse or dependent child is dependent on the years of USM service of the UMD Employees or Retiree, as follows:

1. One academic year, if the UMD Employee or Retiree was employed in the USM for less than three years;
2. Two academic years, if the length of employment was at least three but less than five years;
3. Three academic years, if the length of employment was at least five but less than seven years;

4. Four academic years, if the length of employment was at least seven but less than nine years; and
5. Five academic years, if the length of employment was nine years or more.

#### B. Other Eligibility Requirements

Eligibility for tuition remission shall continue:

1. For spouses, for a maximum period of seven years after the death of the UMD Employee or Retiree.
2. For children, as long as the child of a deceased UMD Employee or Retiree qualifies as a "Dependent Child" under Section II.A. of this policy.

#### C. Part-time Employees

For spouses and dependent children of part-time USM Employees or Retirees who are employed at fifty percent (50%) time or more and who die in service or after retirement, the percentage of tuition remission shall be proportional to the percentage of employment service averaged for the three years immediately preceding the employee's retirement or death.

### VI. RECIPROCAL TUITION REMISSION FOR THE DEPENDENT CHILDREN OF UMD EMPLOYEES ATTENDING MORGAN STATE UNIVERSITY, SAINT MARY'S COLLEGE OF MARYLAND AND BALTIMORE CITY COMMUNITY COLLEGE

#### A. General Reciprocity

Dependent children of UMD employees may attend Morgan State University, Saint Mary's College of Maryland and Baltimore City Community College ("the Non-USM Institutions") and shall receive tuition remission at the same level of benefits as provided for dependent children of UMD Employees, subject to the definitions, requirements and limitations of this policy. However, the extent of the tuition remission benefit under this section is dependent upon full reciprocity being extended by the Non-USM Institution to dependent children of UMD Employees, and may be limited by the Chancellor or designee to align with any more restrictive requirements that may be established by the Non-USM Institution.

#### B. Retirees and Spouses

Tuition remission shall not be available to UMD Retirees or the spouses or dependents of UMD Retirees at Non-USM institutions.

### VII. CONTINUED APPLICATION OF PRIOR POLICIES

This policy supersedes all prior policies and procedures related to tuition remission benefits for USM Employees and Retirees, except as follows:

#### A. Former Employees of Former USM Programs and Institutions

Special eligibility requirements for former employees and retirees of certain former USM programs shall remain in force as follows:

1. The USM former programs subject to this paragraph are: Maryland Institute for Agricultural and Natural Resources (MIANR), the Maryland Institute of Emergency Medical Services Systems (MIEMSS), and the University of Maryland Biotechnology Institute (UMBI).
2. Eligibility for tuition remission for the spouses and dependent children of the above programs is set out in documentation established at the time that the programs were restructured and maintained at the USM.