

California Lutheran University

Education Benefits Policy

California Lutheran University (CLU) Education Benefits Policy provides various education benefits for eligible faculty and staff members, their spouse, their same sex domestic partner, and eligible dependent children.

I. Minimum Eligibility

The following criteria are the minimum eligibility requirements for education benefits. The remainder of this policy applies to employees who meet all of the minimum eligibility requirements in this section.

- A regular full-time staff member scheduled to work 2,080 hours per year (i.e., a full-time appointment) or regular part-time staff scheduled to work 1,560 hours per year (i.e. three-quarter time appointment) or more. (*The amount of benefit will be pro-rated proportionately to the paid hours of employment for eligible employees.*)
- A ranked faculty member contracted to teach 24 semester credit hours or the equivalent during an academic year. (*Faculty on Sabbatical Leave shall be eligible on the same terms as if the faculty were still teaching during the term of the Sabbatical.*)
- Staff or faculty must complete at least one year of continuous employment prior to eligibility and must maintain continuous active employment with the university at the qualifying level during the full term of the benefit utilization.

II. Amount of Education Benefits

Covered Costs

Only tuition for courses applied to the completion of a degree is considered a covered cost under this policy. Non-tuition expenses associated with room (housing), board (meals), books, student government fees, health insurance, laboratory or technology fees, material fees, physical education activity fees, travel expenditures, applied music lesson costs, or any other expense that is not tuition is excluded from coverage. Tuition Remission Scholarship is limited for the Ed.D. Program (see below) and is not available for the Psy.D. Program. Audited courses are not covered under this policy.

Faculty and Staff

- Tuition Remission Scholarship is limited to a maximum of two courses per term irrespective of the program.
- 80% Tuition Remission Scholarship for employees enrolled in eligible graduate and credential programs.

- 100% Tuition Remission Scholarship for the first class and 80% for the second class taken per term in the Bachelor's Degree for Professionals undergraduate program.

Spouse/Same Sex Domestic Partner

- 80% Tuition Remission Scholarship at California Lutheran University for baccalaureate work in the undergraduate program (not to exceed 140 units) or the attainment of their first baccalaureate degree, whichever comes first, and fifth year credential work (not to exceed 36 semester units).

Qualifying Dependent Children

- 80% Tuition Remission Scholarship at California Lutheran University for baccalaureate work in the undergraduate program (not to exceed 140 units) or the attainment of their first baccalaureate degree, whichever comes first, and fifth year credential work (not to exceed 36 semester units).
- National Tuition Exchange (TE) Scholarship; or
- Evangelical Lutheran Church of America (ELCA) Tuition Exchange Scholarship.

Faculty and Staff Members Hired Prior to June 1, 1983

After continuous qualifying employment with the university, eligible faculty and staff members hired prior to June 1, 1983 are also eligible for following education benefits:

Dependent Children (*unmarried under the age of 25 prior to start of term*)

- 100 % Tuition Remission Scholarship at California Lutheran University for baccalaureate work in the undergraduate program (not to exceed 140 units) or the attainment of their first baccalaureate degree, whichever comes first, and fifth year credential work (not to exceed 36 semester units).

Disabled and deceased faculty and staff members

Should an eligible employee die or become permanently disabled while employee's spouse/same sex domestic partner and/or dependent children are currently enrolled, California Lutheran University will continue to grant Tuition Remission Scholarship through that current academic year on the same terms as those for which they would have been eligible if the employee were still employed at California Lutheran University. In these such cases, future Tuition Remission Scholarship is allowed for the permanently disabled or deceased employee's spouse/same sex domestic partner and eligible children currently enrolled at CLU if the employee had been employed at CLU full-time for 10 or more years. No benefit is available if the employee's dependent is not currently enrolled at CLU at the time of the employee's death or disability.

III. Description of Benefits

Tuition Remission Scholarships at California Lutheran University

Eligible faculty, staff, spouses, same sex domestic partners, and dependent children are subject to applicable admission requirements and, once admitted, to the same policies and procedures to which other students are subject. Tuition Remission Scholarship recipients will also be held to the full standards of the Satisfactory Academic Progress (SAP) policy as outlined in the Bachelor's Degree for Professionals , Traditional Undergraduate (TUG), and GRAD SAP policies to be eligible to continue receiving Tuition Remission Scholarship benefits. SAP review is conducted annually at the end of the Spring/OM4 Terms after Final Grades for the term have been posted.

If a student withdraws from a course after the last day to withdraw without record, the course will be counted toward the credit limit. Courses a student has failed or repeated will also be counted toward the limit. Medical withdrawals supported by an official withdrawal petition will not be counted toward the credit limit.

The amount of benefit will be pro-rated proportionately to the paid hours of employment for eligible employees. Tuition Remission Scholarship for graduate work is available for employees only. A student may use only one education benefit at a time. Benefits may not be combined.

If the faculty or staff member goes to a reduced work schedule such that they are no longer eligible or they separate employment with the university, for any reason, the benefits under this policy will cease as of the last day of employment or effective date of the reduced schedule. Any tuition not covered by the benefit, to be determined on a prorated basis, will be due and payable by the faculty/staff member.

CLU will continue to grant Tuition Remission Scholarship through the current semester/term if the university terminates the employment of an individual who is enrolled in classes or whose spouse and/or children are enrolled in classes. For purposes of this policy, "hired or rehired" means the first day of employment or reemployment as established in the contract (faculty) or appointment letter (staff).

Faculty and Staff

Eligible faculty and staff members will be enrolled in classes if space in the classes is available after the enrollment of regular, tuition-paying students. If space is limited in any class, faculty and staff members eligible for Tuition Remission Scholarship scholarships will be enrolled in the order in which they registered for the class. Audited courses are not covered under this policy.

With prior written approval from their supervisors, staff members may take courses during their normal working hours, if absence during course meeting times does not significantly impair normal department routine or burden other staff members. Employees must make up the time

used during normal working hours at times mutually agreed upon with the supervisor. Employees are considered "off-duty" while attending class and CLU does not compensate staff for attending classes covered by education benefits during working hours.

Staff who are enrolled in programs that require participation in internships and/or clinical practicum will be required to submit a written work schedule plan to their supervisor for approval each term in advance of enrolling in these classes. The plan must identify how enrollment in these classes will impact job performance.

Spouse/ Same Sex Domestic Partner and Dependents

Dependent children of eligible faculty and staff must be enrolled as regular full-time students at CLU for baccalaureate work in the undergraduate program (not to exceed 140 units) and fifth year credential work (not to exceed 36 semester units). Exceptions may be requested for the summer term for dependents that are currently enrolled as full-time students at other institutions. Dependents must be currently enrolled and complete a minimum of 12 semester credits at CLU before becoming eligible to receive Tuition Remission Scholarship for the Study Abroad Program.

Tuition Remission Scholarship for eligible spouses/same sex domestic partners and unmarried dependents will be reduced by their scholarships and grants from other sources so that total scholarships and grants will not exceed California Lutheran University's tuition. Employees who are eligible for Cal Grants for their dependents are expected to apply through the Financial Aid Office each year by March 1st for grants awarded the following academic year. If a Cal Grant is awarded to an employee's dependents, the University will continue to grant Tuition Remission Scholarship. The combined total award from Cal Grant and CLU's Tuition Remission Scholarship program may not exceed 100% of tuition costs.

Tuition Remission Scholarship for the Ed.D. Program at California Lutheran University

Tuition Remission Scholarship for the Ed.D. Program is available to full-time employees on a limited basis. Employees must meet the enrollment criteria for admission to the program and be recommended by their respective dean or vice president. Tuition Remission Scholarship for this program will be awarded at 50% of the tuition to no more than 20% of an entering doctoral cohort. (Example: Four CLU employees would be eligible to receive Tuition Remission Scholarship in a cohort of 20 students; three employees would be eligible for this benefit in a cohort of 15). The Provost and Vice President for Academic Affairs must approve all of the Tuition Remission Scholarship awards for this program.

Those individuals selected to receive this benefit are expected to remain employed at CLU for at least three years after completion of the Ed.D. Program. If an employee does not remain at CLU for a full three years, he/she will be expected to repay the value of the Tuition Remission Scholarship given on a prorated basis depending upon the actual years of service completed after earning an Ed.D. If the institution elects not to continue employment and initiates a separation, the recipient will not be expected to repay the value of the Tuition Remission Scholarship.

National Tuition Exchange (TE) Scholarships

[Tuition Exchange, Inc.](#) is a non-profit association of more than 600 colleges and universities that enables a reciprocal scholarship program among participating institutions. The employing institution (CLU) certifies eligibility and the receiving institution determines the number and criteria for award decisions. Dependent children of a faculty/staff member who meet eligibility requirements defined in this policy have the opportunity to compete for TE scholarships for up to four years (8 semesters or 12 quarters) or the attainment of their first baccalaureate degree, whichever comes first.

Scholarships under this program are subject to exchange balances. There can be more applications to some schools than the number of scholarships available. Each participating institution determines how many scholarships they will award each year. TE scholarships are competitive and are not guaranteed. TE Scholarship applications should be submitted in the fall for the following academic year awards (i.e. fall 2013 application for FY 2014-15 awards.)

Evangelical Lutheran Church of America (ELCA) Tuition Exchange Scholarships

The Evangelical Lutheran Church of America has an affiliation with 26 Lutheran colleges and universities that reciprocate a tuition exchange scholarship program among participating ELCA institutions. The employing institution (CLU) certifies eligibility and the receiving institution determines the number and criteria for award decisions. Dependent children of a faculty/staff member who meet eligibility requirements defined in this policy have the opportunity to apply for ELCA tuition exchange scholarships.

Scholarships under this program are subject to exchange balances. There can be more applications to some schools than the number of scholarships available. Each participating institution determines how many scholarships they will award each year. [ELCA tuition exchange scholarships](#) are not guaranteed. ELCA Tuition Exchange Scholarship applications should be submitted in the fall for the following academic year awards (i.e. fall 2013 application for FY 2014-15 awards.)

IV. Application Process

Employees must submit a new [Application for Tuition Remission form](#) and Qualifying Relatives must submit a new [Application for Tuition Remission for Qualifying Relatives form](#) to Human Resources at least two weeks in advance of each semester/term for which a tuition remission benefit will be used.

National Tuition Exchange and ELCA Tuition Exchange Scholarship applications for eligible dependents planning to attend other institutions must submit the [Application for Tuition Exchange & ELCA Scholarship form](#) to Human Resources in the fall for the following academic year awards (i.e. fall 2013 application for FY 2014-15 awards).

Contact Human Resources for additional information and deadlines for applying for these benefits.

V. Taxation

Taxation of benefits offered under the Education Benefits Policy is determined by the [Internal Revenue Code](#) and is subject to change at any time.

VI. Definitions

Dependent Child - the employee's unmarried natural, adopted or qualifying step-child, under the age of 24 prior to start of term and who is claimed as tax dependent on the employee's prior years federal income tax return. A qualifying step-child must permanently reside in the employee's home and been claimed as a dependent on the employee's federal income tax return for at least five years prior to his/her first enrollment at CLU. Court-appointed legal wards, foster children, and foreign exchange students are not eligible for education benefits. Proof of dependent status is required. Requests for exceptions to the dependent child definition will require the employee to submit a written appeal with additional supporting documentation for consideration to Human Resources. The University reserves the right to approve or reject any exceptions to this definition.

Spouse - one to whom an employee is currently legally married. Proof of marriage is required via an Affidavit of Marriage form available on CLU Human Resources website.

Same Sex Domestic Partner – one who meets all the requirements of Section 308 (c) of the California Family Code or a registered domestic partner who meets all the requirements of Sections 297 or Sections 299.2 of the California Family Code.

Disability - either (1) for the first 24 months of the employee's disability, being completely unable to perform the material and substantial duties of his or her normal occupation and not performing any other occupation; and (2) after that 24 months, being unable to perform the material and substantial duties of any occupation for which the employee is reasonably qualified by education, training, or experience. The disabled employee must be under the regular care of a physician, other than himself or herself or a member of his or her family.

VII. Policy Administration

Questions regarding administration of education benefits should be directed to the Human Resources Department:

- Phone number: (805) 493-3185
- Email address: hr@callutheran.edu
- Campus location: Building Three Human Resources Department

The Vice President for Administration and Finance oversees the administration of the education benefits policy and has discretionary authority to interpret the policy as needed. Appeals for any exceptions to the policy must be submitted in writing for consideration by the President's Cabinet.

The University reserves the right to amend or terminate this policy at any time.

Revised: June 26, 2013

Effective Date: July 1, 2013