

Compensation

Salaries

Pro-rata Part-time and Overload Pay Scale

Scale of Remuneration for Summer Session Instruction

Fringe Benefits

Salaries

1. The maximum, minimum, and mean salaries paid within each rank will be published and distributed annually to the faculty by the Academic Affairs Office. This office will also publish a graph chart that indicates the salary distribution of all full-time faculty.
2. The salary schedule, including perquisites, will be continually under review by the Vice President for Academic Affairs and the Faculty Affairs and Development Committee.
3. The salary of each faculty member will be reviewed annually.

Pro-rata Part-time and Overload Pay Scale

The part-time and overload pay scale will be published and distributed annually each September by the Academic Affairs Office.

Scale of Remuneration for Summer Session Instruction

1. Payment to faculty members for teaching in the summer session will be at the following rate:

Salary is computed on the basis of two percent of the preceding year's base salary at California Lutheran University for each credit hour taught. Part-time faculty receive a salary based on the published pay scale.

2. Contracts for summer session instruction will be issued as soon as possible after course enrollments are known.

Fringe Benefits

The University has made all necessary modifications in its several benefit programs to comply with the federal Employee Retirement Income Security Act (ERISA) requirements. In accordance with ERISA, each eligible employee is provided with a Summary Plan Description for each program, including the plan brochures, setting forth eligibility requirements and the benefits provided under ERISA.

All benefit programs are available to all employees who meet eligibility standards and are employed for more than 1,000 hours per year (generally one-half time). Benefits based on other than a percentage of salary or wage basis are prorated for those persons employed less than full time.

For more specific information about any of the fringe benefit areas, contact the Human Resources Office.

1. Unemployment Compensation

Employees who qualify under the laws of this state may be eligible to receive unemployment compensation after termination from California Lutheran University. Details as to the plan and the processes involved are available from local offices of the California State Employment Development Department (EDD).

2. State Disability

Applications are available through the individual's private physician or the EDD office.

Under the California Unemployment Insurance Code, California Lutheran University is required to deduct one percent of gross salaries and wages monthly from all employees, as consistent with current law. Benefits are payable when an employee cannot work because of sickness or injury NOT caused by the employee's job. Benefits begin on the eighth day of disability and are payable for a maximum of nine months in accordance with a basic benefit schedule based on quarterly wages earned. The University integrates S.D.I. with sick leave and vacation.

3. Worker's Compensation

Each employee is covered from the minute he or she starts to work until the workday concludes for on-the-job accidents, injuries or health hazards caused by the job. California Lutheran University pays the total cost of this insurance. This comprehensive plan covers three major areas: industrial accident (salary for days lost on the job); medical (doctors and hospitalization); and death and disability benefits.

With respect to compensation received, the employee may receive as salary only the compensation paid under the Worker's Compensation Insurance. The employee may also elect to supplement this payment with sick leave.

4. Procedures for Filing Worker's Compensation Claim

Employees must be given a claim form stating full disclosure of their rights within 24 hours of injury coming to the attention of the University.

The supervisor will do the following:

- A. Call Human Resources Office to advise of the injury;
- B. Send employees not seriously injured to Health Services and Human Resources Offices for medical authorization slip and employee report;
- C. Fill out supervisor's report and return to Human Resources Office within 24 hours of injury.

IN CASE OF AN EMERGENCY

1. Call x3911, Campus Safety and Services, giving exact location on campus.
2. Call Human Resources Office to advise of injury and fill out supervisor's report.

OFF HOURS - Security officers are available to transport employees to the medical clinic, if necessary.

Disability slips from the doctor should be given directly to the Human Resources Office by the injured employee when he or she returns to work.

All injured employees not requiring ambulance services must be seen by the medical facility designated by the University.

5. Social Security

The employee's W-2 form shows the amount paid each calendar year and is sent to the employee's home by the University prior to February 1 of the following year.

Faculty who are members of the clergy may be considered "self-employed" for FICA and Medicare tax purposes. Accordingly, the University will not deduct otherwise mandatory FICA/Medicare taxes from the faculty member's pay nor will the University remit payment to the U.S. government for FICA/Medicare taxes on behalf of the faculty member. Alternatively, the University will add the FICA/Medicare tax amounts to the clergy's gross pay.

6. Carrier Benefits

In cases where a plan document differs from the handbook, the plan document takes precedence. The Human Resources web page may also be accessed to review the most current benefits summary.

7. Group Medical and Hospitalization Insurance

The University provides all eligible employees the benefit of enrolling in our group medical insurance plan. Administrators with an annual half-time contract or more are eligible for enrollment within the first 30 days of commencing work at California Lutheran University. Staff employees who work 30 hours per week or more are eligible for enrollment the first of the next month after completing 30 days. Two programs are currently available: an indemnity plan and a Health Maintenance Organization (HMO). The employee may choose either plan. The University pays the premium for the employee, and the employee may elect coverage for his or her dependents provided s/he pays that portion of the premium.

An open enrollment period is held once a year during which time employees may change from one plan of coverage to the other, if they wish. Dependents who have not been previously enrolled (and were eligible for enrollment) may sign up for coverage at this time.

Applying for a change of status for insurance is the responsibility of the employee. Adding or deleting dependents or noting a change of marital status, etc., must be initiated by the employee.

Upon termination from employment at California Lutheran University, one may apply for continuation of benefits in accordance with the guidelines established through the Consolidated Omnibus Budget Reconciliation Act (COBRA) legislation. The terms of continuation are identified in the plan summary booklet. A conversion policy is also available (see Human Resources Office)

8. Group Life Insurance

The University provides a group life insurance policy to all eligible employees within the first 30 days of commencing work. Administrators with an annual halftime contract or staff who work 30 hours per week or more are eligible to enroll. The value of this benefit is equal to two times the employee's annual base salary. The value decreases after age 65. Eligibility coincides with enrollment in the University's medical insurance plan. Details of the plan are available from the Human Resources Office. (Note: Life insurance values in excess of \$50,000 are taxable to the employee. This tax is withheld from the employee's final paycheck at the end of each calendar year.)

9. Disability Plan – Long Term

Each employee working a minimum of 32 hours per week following one year of employment will be enrolled in a long term disability plan. This insurance premium is paid for in full by California Lutheran University. Should one become totally disabled, this plan provides disability benefits equal to 60 percent of one's Covered Monthly Salary, not to exceed \$3,500 monthly. If one qualifies for benefits under the terms of this plan, payments are made on the first of the month following six consecutive months of total disability. Details of the plan are available in the Human Resources Office. Upon enrollment in the plan, individuals receive an insurance certificate summarizing the Group Total Disability Benefits Insurance from the insurance carrier.

10. Cafeteria Flexible Benefits Plan

Employees may elect to enroll in the University's Flexible Benefits Plan (section 125/IRS code). This program affords employees the opportunity to tax defer expenses in the following categories:

- A. Dependent medical insurance premiums
- B. Uncovered medical/dental expenses
- C. Dependent Care

Tax deferred amounts must be in accordance with limits established by the IRS and California Lutheran University. Enrollment may coincide with enrollment in the University's medical insurance program or during the annual open enrollment period. Further details of this program are available in the Human Resources Office.

11. TIAA-CREF Retirement Program

The University provides to employees who meet eligibility requirements, at its cost, a retirement annuity contract with TIAA-CREF (Teachers Insurance and Annuity Association and College Retirement Equity Fund). All eligible employees will begin participation in this retirement plan upon completing one year of service (who work a minimum of 1,000 hours or more per year—administrators, half-time annual contract, and staff who work 20 hours or more per week) and attaining age 22. In any event, however, employees in eligible categories of employment who have fully vested, fully funded benefits under the terms of an institutional retirement plan of a previous employer may begin participation in this retirement plan following employment at CLU. Brochures about the plan are available through the Human Resources Office. Summary Plan Documents are also provided to all eligible employees.

California Lutheran University contributes the equivalent of 10 percent of the employees' regular annual salary to the plan. Contributions under this retirement plan, referred to as #Plan Contributions, will be made monthly during the years of participation, except for months in which no salary is paid. (Regular salary shall mean basic annual earnings exclusive of overtime pay.)

One's income after retirement is based on the earnings and number of years in the plan. Quarterly statements are provided directly to participants from TIAA-CREF.

The Human Resources Office holds information sessions at least twice a year to advise eligible employees of the retirement program and review investment options available through TIAA-CREF.

For clerical administrators who are on the ministerial roles of the Evangelical Lutheran Church in America, the University will contribute toward the Church's retirement plan at a level equivalent to 10 percent of the employee's regular salary.

The University Retirement Plan is in compliance with ERISA and REACT (Retirement Equity Act) and the Tax Reform Act of 1986.

12. Tax-Deferred Annuities

Employees may elect to contribute to a supplemental retirement annuity on a tax-deferred basis according to the limits established by the IRS, at any time. Plan descriptions and materials are available in the Human Resources Office. This option is available to all employees. The percentage you elect to contribute to a tax-deferred annuity must be reviewed by the Human Resources Office.

13. Dental/Vision Insurance

The University provides dental and vision insurance to eligible employees within the first 30 days of commencing work. Administrators with an annual half-time contract are eligible to enroll. Eligibility coincides with enrollment in the University's medical insurance plan. Specific plan features, lists of participating physicians and application forms are available through the Human Resources Office.

14. Employee Assistance Program

The University provides an employee assistance program to eligible employees within the first 30 days of commencing work. This managed-care program offers a full range of emotional, behavioral and psychological services to employees and eligible dependents. Faculty with an annual half-time contracts are eligible to enroll. Eligibility coincides with enrollment in the University's medical insurance plan. Eligible dependents are automatically covered. Specific plan features and application forms are available through the Human Resources Office.

15. Institutional Benefits

A. Identification Cards

Each employee is required to obtain an official California Lutheran University identification card as soon after joining the staff as possible.

The I.D. card permits the faculty member to attend many on-campus functions, including athletic events, at no cost. The same applies to immediate members of the family, including spouse and children.

Lectures and concerts for which there is no charge to California Lutheran University students are also open to employees without charge.

Remember in order to take advantage of said benefit; it is imperative that the I.D. card be shown in order to gain admission.

B. Tuition Remission for Administrators and Staff

Effective June 1, 2009 all full-time administrators and staff are eligible for 80% tuition remission for spouses, registered domestic partners and unmarried dependents (through age 23) for baccalaureate work in the undergraduate program (not to exceed 130 units) and fifth year credential work (not to exceed 36 semester units). There is a one year eligibility waiting period. The reduction does not apply to fees. Classes

that are audited are not covered by this benefit. Dependents must meet admission standards and must be enrolled as regular full-time students at CLU in order to receive this benefit. Dependents must complete a minimum of 12 semester credits at CLU before becoming eligible to receive tuition remission for the Study Abroad Program.

Full-time employees enrolled in graduate and credential programs will be eligible to receive 80% tuition remission. Full-time employees will be eligible to receive 100% tuition remission for the first class and 80% for the second class taken per term in the ADEP program. Employees are limited to receiving tuition remission for a maximum of two courses per term irrespective of the program in which they are enrolled. Tuition remission is available only to classes that are applied to the completion of a degree.

Administrators with half-time annual contracts or greater and staff who work 30 hours per week or more shall benefit proportionately to their hours of employment. Dependents are defined as natural or adopted unmarried children whose status qualifies them for exemption for federal income tax purposes. This policy excludes foreign exchange students and foster children.

Tuition remission for eligible spouses 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 year. If a Cal grant is awarded to an employee's dependents, the University will continue to grant tuition remission. The combined total award from Cal Grant and CLU's tuition remission program may not exceed 100% of tuition costs.

Prior to registering for a course for which one is entitled to a tuition discount, it is the responsibility of the employee to first secure an application from the Human Resources Office. Only via this manner does the Business Office know what charges should be applied. This should be done at least two (2) weeks in advance of registration each term.

Administrators and 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 supervisors for approval each term in advance of enrolling in these classes. The plan must identify how enrollment in these classes will impact job performance. In order to retain eligibility for benefits, staff must work a minimum of 30 hours per week and administrators must have at least a half-time annual contract. A reduction in hours to these levels will impact vacation and sick leave accruals as well as the percentage of tuition remission granted.

Tuition remission for graduate work is available for employees only.

Tuition remission for the Ed.D. program is available to full-time employees on a limited basis beginning with the 2007-08 academic year. In order to be eligible to receive this benefit, employees must meet the enrollment criteria for admission to the program and be recommended by their respective dean or vice president. Tuition remission for this program will be awarded at 50% to no more than 20% of an entering doctoral cohort. (Example: Four CLU employees would be eligible to receive tuition remission 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 awards for this program.

Those individuals selected to receive this benefit are expected to remain employed at CLU for at least four years after completion of the Ed.D. program. If an employee does not remain at CLU for a full four years, he/she will be expected to repay the value of the tuition remission 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.

If the university terminates the employment of an individual who is enrolled in classes or whose spouse, registered domestic partner and/or unmarried children are enrolled in classes, CLU will continue to grant tuition remission through that current semester/term.

Should an employee die or become permanently disabled while spouse and/or children are enrolled, California Lutheran University will continue to grant tuition remission through that current year. Future benefits are allowed deceased employee's spouse and children if the employee has been employed for 10 or more years.

(Revised June 2010)

C. TUITION REMISSION FOR ADMINISTRATORS AND FACULTY HIRED PRIOR TO JUNE 1, 1983

Eligibility age for unmarried dependents is under age 25.

Maximum reduction of tuition is 100 percent.

All other previous terms and conditions apply as specified above.

D. Tuition Exchange Program

The Tuition Exchange (TE) is an organization that allows eligible, dependent children of faculty; administration and staff from member institutions to attend other member institutions at significantly reduced rates. In most cases, the scholarship value matches tuition at the host institution but does not include room, board, special fees, or any other non-tuition expenses. Over 400 colleges and universities from around the country are members of the TE Program. Full-time faculty, administration and staff who have completed 3 years of full-time employment are eligible to apply for TE participation on behalf of their dependent children who must be under 23 years of age. Acceptance into this

program will be for first baccalaureate degrees only. The eligibility of each student applying for a TE scholarship must be certified by the TE Liaison Officer (the Vice President for Administration and Finance) and is based on the Application for Tuition Exchange Scholarship and Certification Form, which can be obtained through the Controller's Office. The application process should begin as early as September 1 of the year preceding the anticipated college matriculation. The application deadline is November 1 prior to the year of matriculation.

A limited number of scholarships are available. In the event that the number of qualified dependent children of CLU employees exceeds the available openings into the Program, employee selection will be determined by a weighted lottery system.

Complete details of this program may be obtained through the office of the Controller.

E. Preschool and Daycare Employee Discount

California Lutheran University's Preschool provides quality preschool and childcare for dependent children of faculty, administration and staff. Priority placement in the program and employee discounts is provided. Dependent children are defined as natural or adopted children whose status qualifies them for exemption for federal income tax purposes. This policy excludes foster children.

Full-time administrators, faculty and staff are eligible to receive a 30% discount for one child and a 35% reduction for two or more children (of the total). There is no waiting period to be eligible for this benefit. The discount does not apply to other fees. Administrators and faculty who have half-time annual contracts and staff who work 30 hours per week shall benefit proportionately to their hours of employment. These discounts are limited to the above amounts specified regardless of the number of parents employed by the University.

Prior to registering at the Preschool, it is the responsibility of the employee to first secure a tuition discount application from the Human Resources Office. Applications should be completed for each year. Once the tuition application is processed, employees may proceed to register their children in the preschool and childcare program.

F. Bookstore Discounts

Normally there will be a discount of 10 % on trade books purchased by faculty, including part-time employees. This discount will apply to books that are on hand in the bookstore. No discount will apply to special orders, but shipping and handling will not be charged.

Faculty will also receive a 10% discount on CLU clothing, gift items and cards.

The bookstore may request that faculty members present their I.D. cards for identification when the discount is requested.

G. Trip Reduction Plan

The institution participates in a Trip Reduction Plan mandated by the Ventura County Air Pollution Control District (APCD). The focus of this plan is to reduce the number of individual commutes to the campus as specified by the APCD. Participation in CLU's incentive plan requires that employees use an alternative mode of transportation at least three times per week. This may include walking to work, riding the bus, riding a bicycle, being dropped off at work, carpooling, telecommuting. Note that the Ventura County APCD carpool definition includes adults or students, 16 years or older traveling to work or school, and/or preschool children or elders dropped off at a facility within ½ mile of the worksite.

Details of the University's incentive program and registration forms are available through the Human Resources Office.