HR Design Recommendations
Benefits Work Team
Submitted: May 15, 2012

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<table>
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<tr>
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<th>Benefits</th>
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Scope

The University of Wisconsin-Madison will continue to participate in state administered health, life, and disability insurance programs and the Wisconsin Retirement System. Beyond this, the HR Design Project presents an opportunity to review benefit levels and configurations and design alternative options as appropriate.

The HR Design – Benefits team is charged to:

- review, assess, and develop benefit options for paid leave, supplemental insurances, and entitlements beyond pay
- review benefit differences among current employment groups (e.g., amount of leave earned, eligibility period to use leave, certain supplemental insurances)
Guiding Questions:

- What benefits should be consistent among categories of employees?
- What leave benefits should be available to employees and how should they be accrued?
- What additional benefits should be considered?
- If benefits will be modified, should employees be given a choice between current and future benefits?

The following topics are not part of the team’s formal scope:

- revising or deleting benefits currently administered by the State of Wisconsin (i.e., health, life, and disability insurance programs and the Wisconsin Retirement System)
- leave related to disability, the Family & Medical Leave Act (FMLA), and Worker’s Compensation
- training opportunities and benefits (HR Design – Employee Development)
- technical execution of benefits in HRS

**Summary of Current State**

Historically, the University of Wisconsin-Madison has had strong employee benefits, including generous health care, vacation, sick leave, unpaid leave, and retirement. Given weak or absent pay plans, a comprehensive benefits package remains a critically important component of employees’ total compensation.

The University of Wisconsin-Madison Commission on Faculty Compensation & Economic Benefits noted in March 2012 that:

> Compared to peer institutions, faculty and staff salaries are low. In an increasingly global market for research and education, UW-Madison is falling behind in its ability to compete... The situation is critical.¹

This sentiment is echoed by many voices across campus. Here are just a few of the messages the Benefits team received through the HR Design campus collaboration process:

Benefits are critical. We as an institution gave up pay raises in the past to get better benefits...

I’ve always felt fine about the fact that UW pays less in salary than most other institutions of higher education, because it was still clear that employees were highly valued given the security of the benefits package. It seemed like a reward for loyal service.

I use to think my excellent benefits offset my low pay, but those benefits are being eroded and I am actively job searching again...

We got lousy pay raises for years. I know some of this evened out in the benefits...

Passage of Act 10 has significantly weakened the benefit package by requiring increased premium contributions and new co-insurance payments for State Group Health and a new 5.9% contribution to WRS Retirement. These paycheck deductions and out-of-pocket payments are a hardship for many employees and have created a climate of anxiety about future benefit reductions and costs:

I really like the health insurance that we have (had). I do not like having to worry about what changes will be incurred next year... That takes time away from thinking about work and home.

The one thing I am most worried about is the pension system being weakened or destroyed. I remember when I first started working for the state in the mid-80’s, my father (who was a business professor in another state) went on and on about how great it was that I was going to work for the State of Wisconsin, because the pension system was phenomenal. He knew all about it, even though he’d never even lived in Wisconsin. I’m really afraid we’re at risk of losing that.

In every campus engagement opportunity, employees have highlighted priorities and concerns related to state-administered benefits, especially State Group Health Insurance and WRS Retirement. Although they are out of scope, we have reviewed these benefits and are making several recommendations.
A central part of the Benefits team’s charge has been to determine what benefits should be consistent. Individual employee benefits differ across employment categories. Differences in what benefits are available, how they are administered, and how they are perceived by employees across campus are due, in large part, to how employment categories have been statutorily defined (WI Stats. Ch. 36, 230) and how benefits have been developed and negotiated by different parties (unions, UW-Madison, UW System, Office of State Employment Relations (OSER), Employee Trust Funds).

Differences are apparent across the full spectrum of benefits, including health insurance, paid and unpaid leave, Income Continuation Insurance (ICI), and tuition reimbursement.

**Strengths**

Although the shifting political context in Wisconsin has dramatically altered costs to employees, satisfaction with employment benefits remains high. Especially important are:

- conversion of accrued sick leave to pay for health insurance in retirement, through the Accumulated Sick Leave Conversion Credits (ASLCC) and Supplemental Health Insurance Conversion Credits (SHICC) programs
- defined benefit pension provided by the Wisconsin Retirement System, lauded for being “on excellent financial footing and among the healthiest in the nation”2
- sick leave accrual, vacation carry over and leave banking, which afford employees flexibility to plan for and manage life experiences
- generous unpaid leave for significant health and family events
- hard-won domestic partner health insurance
- “life enhancers” such as the UW Employee Bus Pass program, Safe Nighttime services, employee discounts on tickets to arts events, and access to recreational sports facilities

Workplace flexibility is highly valued by employees working in departments and units with a culture and HR practices supporting flexibility.

Beyond formal benefits offered to employees, members of our university community enjoy a beautiful natural setting and access to a broad variety of cultural amenities.

**Concerns**

External perceptions about public sector and university benefits:

We believe criticisms leveled at the university’s benefits, which some people consider “overly generous” by comparison with the private sector, are misdirected. The University of Wisconsin-Madison competes for labor in many markets (global, national, regional, local) and must attract and retain the best employees in all types of positions to remain an “outstanding public research university [applauded] for its range of significant accomplishments and progress and its continuing commitment to world-class education, research and public engagement.”3 Benefits remain a critically important part of the total compensation package.

**Metrics:**

Without reliable longitudinal HR metrics, it is difficult to assess whether benefits are meeting employee needs, whether they are being administered as efficiently and effectively as possible, and whether our benefits offer a competitive lead.

**Benefits Education:**

Employees cannot take full advantage of benefits they do not fully understand. A more user-friendly system would help employees learn about and select benefits, find answers to their questions, and be aware of effects of their benefits choices.

Additional resources will be required to provide both timely education for new employees and benefits counseling desired by ongoing employees.
Consistency & Equity:

The proliferation of differences in benefits – in part an outcome of disconnects between bodies charged to develop benefits for classified and unclassified employees, and in part an unintended consequence of the collective bargaining process – make our benefits system unnecessarily difficult to administer, confusing, and inequitable.

HR practice varies across divisions and departments. To some extent, an employee’s benefits experience depends on where he or she works. An employing unit’s resources, business constraints, and supervisor’s philosophy affect how benefits can be used (e.g., leave) and what benefits are available (e.g., tuition reimbursement). These differences contribute to problematic class/caste distinctions and fuel hard feelings.

Gaps & Redundancies:

In some cases, there are mismatches between available benefits and employee needs. For example, while the university offers a generous unpaid leave for childbirth and adoption, most employees cannot afford a lengthy absence. Premiums for a 30-day waiting period for Income Continuation Insurance (ICI), the only option currently available to new classified employees, are more expensive and consequently out of reach for many.

Multiple supplemental insurances create redundancies and confusion (four supplemental life insurance plans, three options for dental insurance, and two options for vision insurance).

State-administered Benefits:

Requiring higher premium contributions and co-insurance out-of-pocket payments for State Group Health Insurance and the new employee contribution to WRS retirement have disproportionately affected lower paid employees.

The Wisconsin Retirement System (WRS) is highly valued and many employees are concerned about its future. Both the system and the defined benefit annuity it offers should be protected.

Changes in the university’s relation to the state and in employment categories may require changes to state-administered Income Continuation Insurance (ICI).

Executive Summary

The HR Design Benefits team believes a benefits package that demonstrates care and commitment to employees throughout their careers, and that compares favorably with academic peers and private competitors, will attract, support, develop, and retain the talented community of employees the University of Wisconsin-Madison needs to maintain – and continually grow in stature as – a world-class university.

We strongly recommend making employment benefits consistent across employee categories. We propose providing uniform leave benefits (except as noted in the full recommendations); streamlining supplemental insurances; preserving key benefits, such as the Supplemental Health Insurance Conversion Credits (SHICC) program; introducing new benefits, including paid parental leave and Leave Share; developing a centrally funded and administered Tuition Assistance program to support employees’ continuing education and career advancement; and expanding “life enhancers” that support wellness and work-life balance, benefit employees, and provide opportunities to contribute on and beyond our campus.

In addition to simplifying our benefits system, we recommend strengthening its foundation by developing reliable HR metrics, enhancing benefits education and consultation, and providing frequent, sustained opportunities for employee engagement. Consistent, streamlined benefits will be easier to measure and to adjust when data and voices from campus suggest changes are needed. Participatory decision-making through shared governance and other opportunities for collaboration and engagement will foster transparency and the continuing vitality of our benefits system.

Benefits Education:

Benefits education is integral to an effective benefits system. Multiple options for benefits education and consultation will help employees understand the pros and cons of benefits choices, select benefits in a timely way, and use benefits when they are needed. Good information, clearly communicated in a timely way, can prevent problems that would otherwise consume many times the amount of resources proactively invested.
Leave:

Uniform leave benefits will be more equitable, transparent, adaptable, and efficient.

- While our team acknowledges differences in Fair Labor Standards Act (FLSA) non-exempt and exempt jobs, reflected in how employees report leave use, we believe that our leave system should reflect individual and social needs related to leave that employees have in common, rather than differences among employment categories.

- Minimizing differences in policy will yield greater consistency and fairness in HR practice. Equal treatment will foster trust. Greater transparency and shared expectations will make leave decisions easier and less contentious for employees and supervisors. When less time and energy are needed to navigate the intricacies of policy and contract differences, more can be devoted to meeting individual employees’ needs and supporting their development.

- Minimizing differences in how employees are treated will support a positive campus climate. When employees perceive differences in treatment as a proxy for how their work is valued, these differences contribute to class/ caste distinctions and morale suffers. Eliminating unnecessary distinctions will mitigate these effects.

- Well-aligned leave benefits will offer employees the flexibility they need to manage personal and professional responsibilities throughout their careers. New employees would have “day one” access to 40 hours of sick leave and 4 weeks of vacation, and also to a new paid parental leave benefit following birth or adoption. Increasing vacation allocations early and often, in combination with options for vacation carry over and leave banking, would support work-life balance for early to mid-career employees. The ability to bank up to 1040 hours (6 months’ worth) of vacation, unlimited sick leave accrual, and sick leave conversion programs (ASLCC and SHICCC) would continue to support long-term planning for retirement.

Our recommendations seek to balance the needs and wishes of employees with the needs and resources of our university. We have tried hard to limit the impact of changes on individual employees.

These recommendations also seek to balance and recalibrate how we think about leave. Our current benefits system freighted leave with multiple, competing values. Leave is for rest and rejuvenation, a form of compensation, an insurance against change and job loss, a ticket to health insurance after retirement, and perhaps more. The long-term practice of increasing benefits in lieu of raising salaries over-emphasizes the value of leave as compensation and consequently distorts our leave system. We need to create a system that encourages employees to use leave as well as saving it responsibly for the future.

All aspects of leave interrelate: altering one recommendation will change the effects of others and may affect eligibility for leave-dependent benefits. Our team’s advice about various kinds and aspects of leave should be read as part of a single, multifaceted recommendation.

A unified leave system cannot last if future decision-makers yield to requests for changes that reintroduce fragmentation. This initiative will succeed to the extent that future adaptations are collectively identified and discussed, are supported by accepted HR metrics, and benefit all employees.

Supplemental Insurances:

Streamlined supplemental insurances will meet employee needs more effectively and efficiently. An e-Benefits “shopping cart” would help illustrate options and costs, making it easier for employees to select coverage they need. Offering comparable, or better, options within a single plan, at a comparable, or reduced, cost would cut the time and effort employees currently spend evaluating the applicability and value of plans offered in our current system – and could eliminate the need for employees to purchase multiple plans. Open enrollment opportunities will support employees’ changing needs as their lives and careers evolve. Thoughtful design will make it possible to add and subtract features as professional best practices change.
List of Recommendations

- Develop reliable HR metrics to assess how well the university’s benefits system is working and maintain a competitive edge in recruiting and retaining excellent employees.
- Improve benefits education and communication to reduce confusion and enable employees to maximize their benefits.
- Increase long-term opportunities for employee engagement, including regular assessment and participatory decision-making to keep the university’s benefits system strong and vibrant into the future.
- Create a single, unified system of paid leave for WRS-eligible employees.
  *These recommendations do not alter or provide new benefits for student hourly employees, graduate assistants (TA’s, PA’s, RA’s), employees-in-training, limited term employees, or short-term academic staff, except as noted in the full recommendations.*
- Conduct a focused analysis to identify a fair and competitive benefits and compensation structure for University of Wisconsin-Madison Trades employees.
- Provide a period of paid parental leave following birth or adoption.
- Continue to permit employees to use accrued paid leave, including sick leave, for bereavement leave, under a single policy.
- Replace classified and unclassified Catastrophic Leave programs with a new, centrally administered Leave Share program.
- Create a single unpaid leave policy that can be used for an employee’s own serious health condition, to care for a family member with a serious health condition, to augment a period of paid parental leave and use of accrued paid leave following a birth or adoption, or to seek political office, accept a political appointment, or provide professional service.
- Streamline supplemental insurances, eliminating duplication and offering better options within plans to meet varying employee needs.
- Provide “Day One” coverage for health insurance: eliminate the requirement for classified staff to wait until the 1st day of the 3rd month of employment to receive the employer contribution toward the State Group Health Insurance premium.
- Advocate at the federal level to end “Imputed Income” for domestic partner health insurance.
  Respect differences in family structure and provide health insurance at an equal cost to all employees. Make an equity related payment, providing reimbursement for imputed income tax and tax on the payment, to employees with family health insurance covering a domestic partner and dependents (“grossing up”).
- Conduct a formal study of health care options for University of Wisconsin-Madison employees, with a focus on the needs of low-income employees. In the interim, provide some type of health care premium relief for low-income employees.
- Preserve benefits that employees value, including the Supplemental Health Insurance Conversion Credits (SHICC) program.
- Recommend improvements to the state-administered Income Continuation Insurance program and offer the same ICI benefit to all university employees.
  If recommendations are not accepted by ETF, provide a supplemental wage insurance option.
- Advocate to protect WRS Retirement and the defined benefit annuity it affords.
  Investigate mechanisms for reducing financial hardship resulting from higher premium contributions required by Act 10.
- Expand “Life Enhancers,” including community service; a wellness program; childcare, dependent care, and elder care referrals; parking and transportation; and discounted services.
Recommendation Description

Benefits Administration

Develop reliable HR metrics, including:

- longitudinal data on employee selection, use and costs of benefits
- employee satisfaction with benefits
- anticipated costs
- benchmarks (with institutional peers in higher education and relevant private sector competitors)

Use this data to help ensure that our benefits system meets evolving workforce needs.

Invest additional resources in Benefits Services to provide more extensive education and consultation to the campus community (individual employees, supervisors, departmental payroll & benefits specialists, divisional HR managers).

Benefits Education

Build on the strengths of Benefits 101 by adding weekly small group sessions, including opportunities for consultation on benefits selection. All new employees should be able to participate in an educational opportunity within the first 30 days of employment.

Offer electronic as well as paper benefits registration. A benefits “shopping cart” (OHR e-Benefits walk-through prototype) could display premium costs and the total amount deducted from each paycheck for selected premiums, and could offer a calculator function (e.g., for ERA, retirement contributions).

Create opportunities for “just-in-time” consultation with a Benefits Specialist (similar to the Dean-on-Call system in the Dean of Students Office). Offer answers in person, on-line and by telephone, plus assistance at Benefits Services computer terminals for employees without computer access.

Develop ongoing educational opportunities and informational resources to help departmental payroll & benefits specialists and divisional HR managers address employee concerns effectively.

Develop small-scale workshops regarding open enrollment opportunities, new benefits tools, and special topics – while preserving excellent one-on-one consultations and sessions currently offered on retirement planning.

Employee Engagement

Assess employee needs and measure employee satisfaction regularly.

Plan for ongoing employee engagement and participation in decision-making. Breadth and depth of engagement will be important as our benefits system continues to evolve. Continue to encourage creative, outside-of-the-ordinary ideas beyond the lifespan of this HR Design project.

In assessing how well benefits meet employee needs and planning for the future, continue to communicate with employees in multiple languages and mediums. Seek feedback from employees as well as sharing information with them (e.g., through campus forums, web chats, surveys, exit interviews). Continue to acknowledge that employees bring different cultural and life experiences, speak many languages, and work throughout the day and night.
Paid Leave

Create a single, unified leave system for WRS-eligible employees:

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<th>Years of Service</th>
<th>1-3 years</th>
<th>4-6 years</th>
<th>7-9 years</th>
<th>10-12 years</th>
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<tr>
<td>Holidays</td>
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<tr>
<td>Vacation</td>
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<td>176 hours</td>
<td>192 hours</td>
<td>208 hours</td>
<td>224 hours</td>
<td>240 hours</td>
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<tr>
<td></td>
<td>(20 days)</td>
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<td>(26 days)</td>
<td>(28 days)</td>
<td>(30 days)</td>
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<td>(16.25 days)</td>
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<td>(50.25 days)</td>
<td>(52.25 days)</td>
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Notes:
1. All allocations prorated for part-time employment
2. Graduate assistants (TA’s, PA’s) and short-term academic staff who normally work on the Friday after Thanksgiving would receive this holiday.
3. All vacation allocations include 36 hours formerly allocated as personal holiday.
4. C-Basis (9-month) faculty and academic staff do not receive vacation.

These recommendations do not alter or provide new benefits for student hourly employees, graduate assistants (TA’s, PA’s, RA’s), employees-in-training, limited term employees, or short-term academic staff, except as noted above.

These recommendations do not apply to Trades employees. We recommend conducting a focused analysis to identify a fair and competitive benefits and compensation structure for University of Wisconsin-Madison Trades employees (please see pp. 15-16).

Holidays

Continue to provide nine existing paid legal holidays: Independence Day; Labor Day; Thanksgiving; Christmas Eve and Christmas Day; New Year’s Eve and New Year’s Day; Martin Luther King, Jr. Day; and Memorial Day.

Add one holiday: Friday after Thanksgiving.

Encourage recognition of important days in employees’ cultural and religious traditions and permit employees to use accrued paid leave (vacation, floating holiday) on these dates.

Personal Holidays

Combine personal holidays with vacation.

 Permit employees to schedule 40 hours of vacation flexibly (as personal holiday traditionally has been scheduled).

Vacation

Create a single vacation benefit for WRS-eligible employees who currently earn vacation.

Allocate leave on a fiscal year basis.

Prorate allocations for part-time employment.

Include 36 hours previously allocated as personal holiday in all vacation allocations.

Allocate a minimum of 160 hours (20 days)/year, at hire.

New employees would be allocated 160 hours (20 days)/year, prorated for part time employment, during the first three years of employment. New employees with prior State of Wisconsin service would enter at a level commensurate with the adjusted seniority date.
Continuing employees would be “grandfathered.” An employee would enter the new system at his or her current allocation of vacation plus personal holiday and would receive additional vacation when eligible under the recommended plan.

No employee would lose vacation. Employees earning less than the new minimum allocation would enter the new system with 160 hours (20 days, 4 weeks) of vacation. Employees earning more than the new maximum allocation of 240 hours (30 days, 6 weeks)/year would continue to earn at their current level, 216 hours + 36 hours (31.5 days)/year until separation/retirement.

Increase the annual allocation by 2 days every 3 years until the maximum allocation is reached. (increases allocated after employee’s 3rd, 6th, 9th, 12th, and 15th anniversary)

Allocate a maximum of 240 hours (30 days)/year, after the 15th anniversary of employment.

Allow employees to use leave from date of hire, with supervisor’s approval.

Report use of leave in 15 minute increments (non-exempt employees) or 60 minute increments (exempt employees).

Permit employees to carry over 80 hours of vacation for one year.

Our initial recommendation was to permit employees to carry over 40 hours of leave for one year.  
(Vote: 6 team members voted for 40 hours; 3 team members voted for 80 hours)

We now recommend that all employees be permitted to carry over 80 hours of vacation for one year.  
(Vote: 3 team members voted for <80 hours; 7 team members voted for 80 hours)

Permit employees to bank up to 40 hours of vacation at the end of the fiscal year in which they reach the 6th anniversary of employment, and up to 80 hours of vacation at the end of the fiscal year in which they reach the 12th anniversary.

Cap leave banking at 1040 hours (6 month’s worth of leave).

End the ability of classified employees who receive an annual vacation allocation of 200 hours or more to “cash out” up to 40 hours of vacation in the year it is earned.
Sick Leave

Create a single sick leave benefit for WRS-eligible employees who currently earn sick leave.

On a fiscal year basis, prorating accrual for part-time employment, earn 130 hours (16.25 days)/year.

Our initial recommendation was to provide 120 hours (15 days, 3 weeks) of sick leave, with continuing employees maintaining their accrued sick leave balances but earning at the new rate going forward.

(Vote: 9 team members voted for 120 hours; 2 team members voted for 128 hours)

We now recommend, with reservations, that employees receive 16.25 days of sick leave per year.

(Vote: split vote: 6 team members voted yes, 2 team members voted yes with reservations, 2 team members had serious reservations and voted no)

Reservations

We recognize that increased sick leave for classified employees was bargained in good faith and that the proposed change would affect the final sick leave balance for some employees, but don’t believe recommending more than three weeks of sick leave for all employees is a responsible proposal: 15 days is a fair amount given employees’ sick leave balances and benchmarks.

We believe our initial decision was thoughtful, evidence-based, and reflected a good compromise (recommending an amount much closer to the current classified employee allocation and “meeting above the middle”).

We cannot demonstrate an operational need to extend 16.25 days of leave to all employees.

Continuing to provide additional leave in lieu of increasing compensation is not a sustainable strategy; this practice should end.

Providing 16.25 days of sick leave per year to each employee may limit the university’s ability to offer other benefits that employees need and want.

The HR Design Project’s “promise” to employees, articulated in the project parameters, is not to reduce any employee’s salary: “Individual base pay for current employees will not be decreased as a result of the implementation of the new HR structure.” It was within our team’s scope to recommend a change in benefits.

Provide an initial allocation of 40 hours at hire for increased flexibility (equal to earnings over a four-month period) and begin earning additional leave after the 4th month of employment.

Use leave as it is earned/accrued.

Continue to permit current uses of sick leave (e.g., for parental leave, bereavement leave).

Report use of leave in 15 minute increments (non-exempt employees) or 60 minute increments (exempt employees).

Require a health care provider’s note for absences of more than 5 consecutive full working days.

Accrue sick leave without limit.

Continue Accumulated Sick Leave Conversion Credits (ASLCC) and Supplemental Health Insurance Conversion Credits (SHICC) programs.

Bereavement Leave

Continue to permit employees to use accrued paid leave, including sick leave, for bereavement leave, under a single policy. Provide as much flexibility as possible to employees following a death in the family, especially when long distance or foreign travel is required.

Parental Leave

Offer a period of paid parental leave following birth or adoption.

We recommend that the period of paid parental leave fall within a range of 4 to 8 weeks. This recommended benefit will require further development by an implementation team.

Allow employees to take up to one year of leave following a birth or adoption, using a combination of paid parental leave, accrued paid leave, and unpaid leave.

Parental leave should be part of a comprehensive family leave system (policies covering birth/adoption, dependent care, care for partner/spouse, elder care).
Leave Share

Create a single, centrally administered Leave Share program including the following features:

- ability to donate accrued vacation or sick leave, in hours, with a waiver releasing the leave
- ability to donate leave to the program during employment or at separation/retirement
- any employee could donate leave, to be used by any employee
- leave designated for use by a specific employee, or donated to be used as needed
- donated leave would remain in the program, would not “expire” until used by a recipient

The Leave Share Program would replace separate Catastrophic Leave programs for classified and unclassified employees and could cover leave beyond catastrophic medical need.

Unpaid Leave

Create a single unpaid leave benefit for:

- an employee’s own serious health condition
- caring for a family member with a serious health condition
- augmenting a period of paid parental leave and use of accrued paid leave following a birth or adoption (total leave of up to one year)
- seeking political office, accepting a political appointment, or providing professional service

Supplemental Insurances

Life Insurance

Eliminate current supplemental plans (Individual and Family Group Life Insurance, UW Employees Inc. Life Insurance, University Insurance Association Life Insurance), and offer one supplemental life insurance plan with various options selected through an online “shopping cart” (OHR e-Benefits walk-through prototype), including the following features:

- not mandatory
- annual open enrollment
- ability to purchase coverage for spouse/partner and dependents
- plan based on need, not annual salary
- wide range of coverage ($5,000 to $1M)
- avoid coverage drop-off at 60-70 years, or raise drop-off age to reflect longer life expectancy
- offer term and whole-life insurance options
- portability (ability to convert to a cost-effective individual plan)
- attempt to contain premium costs related to health limitations

Accidental Death & Dismemberment Insurance

Continue to offer an Accidental Death and Dismemberment policy that allows employees to opt-in/opt-out at any time, choosing the level of coverage on opt-in date, and that includes travel coverage when a covered injury is sustained outside the United States.
Dental Insurance

Offer one dental insurance plan (retaining or improving the level of benefits currently available in multiple plans, at a comparable cost), including the following features:

- annual open enrollment
- option to purchase various levels of coverage
- ability to cover spouse/partner and dependents
- network of providers throughout the area and beyond Dane County
- calculator function on the website or “shopping cart” to assist employees in determining ERA coverage for out of pocket expenses
- coverage reflecting current best practice in dental care

Vision Insurance

Offer one vision insurance plan (retaining or improving the level of benefits currently available in multiple plans, at a comparable cost), including the following features:

- annual open enrollment
- option to purchase various levels of coverage
- ability to cover spouse/partner and dependents
- network of providers throughout the area and beyond Dane County
- calculator function on the website or “shopping cart” to assist employees in determining ERA coverage for out of pocket expenses
- coverage reflecting current best practice in vision care and choices most employees are making (e.g., progressive lenses)

Major Medical Insurance

Offer one major medical insurance plan, including the following features:

- annual open enrollment
- option to purchase various levels of coverage
- option to cover other family members (children, parents, grandparents)
- cover items and services not covered in HMO plans (e.g., durable medical equipment; additional occupational or physical therapy, home health care)
- remove accidental death & dismemberment, dental, and vision insurances (offer these insurances separately)

State-Administered Benefits

State Group Health Insurance

All employees should enjoy “Day One” coverage (coverage beginning on the first day of the month after the application for health insurance is received; application due within 30 days of hire). Wisconsin Statute 40.05(4)(a)(2), requiring that new classified employees wait until the 1st day of the 3rd month of employment before receiving the employer contribution toward the State Group Health insurance premium, should no longer apply. If the statute continues to apply, the university should cover this cost.
Advocate at the federal level to end “Imputed Income” for domestic partner health insurance.

Respect differences in family structure and provide health insurance at an equal cost to all employees. Make an equity related payment, providing reimbursement for imputed income tax and tax on the payment, to employees with family health insurance covering a domestic partner and dependents (“grossing up”).

Conduct a formal study of health care options for University of Wisconsin-Madison employees, with a focus on the needs of low-income employees.

- How can we continue to secure high quality health care for all employees?
- What mechanisms would help reduce current and future costs without reducing health care benefits (self insurance, sliding scale fees based on income, co-pay vs. co-insurance, low premium/high deductible plan)?

In the short term, provide some type of health care premium relief for low-income employees.

**Income Continuation Insurance (ICI)**

The current rules for ICI through Employee Trust Funds (ETF) treat unclassified and classified employees differently. These rules will need to change if the university adopts new employment categories.

Recommend changes to the state-administered Income Continuation Insurance program:

- University of Wisconsin-Madison employees have the same enrollment opportunities and follow the same program guidelines (e.g., when eligible, employer contribution, premium determination, waiting periods)
- offer at least three opportunities for enrollment (at hire, at sick leave balance of 520 hours, at sick leave balance of 1040 hours)
- full employer contribution at 6 months of WRS-eligible employment
- reduce the 1040 hour (130 day) waiting period (1040 hours represents 8-10 year’s worth of sick leave earnings)
- allow employees to select a waiting period with corresponding premium level (30 days, 60 days, 90 days, 120 days); offer 120 days as a no-premium “free” option
- explore option to elect a shorter waiting period (<30 days) for an increased premium
- continue to offer supplemental plan for employees earning more than $64,000 per year (75% of WRS gross salary up to $120,000; employee pays full premium)

If these recommendations are not implemented by Employee Trust Funds (ETF), then offer a supplemental wage insurance plan.

**Supplemental Health Insurance Conversion Credits (SHICC)**

Continue SHICC for University of Wisconsin-Madison employees. A new program will be needed because, effective 1 July 2013, university employees will no longer be covered by Wisconsin Statutes Chapter 230. We recommend that university employees be eligible for the same benefits offered by the OSER/ETF-administered SHICC program.

Advocate for legislation to make SHICC a statutory, as opposed to administrative, benefit.

**WRS Retirement**

Advocate for the Wisconsin Retirement System and the defined benefit annuity it affords: protect and maintain the system to benefit current and future employees.

Investigate mechanisms for reducing financial hardship resulting from higher premium contributions required by Act 10, with a focus on the needs of low-income employees.
Tuition Assistance

Tuition Assistance for Employees
Offer one centrally funded and administered tuition assistance benefit for employees, including the following features:

- maximum reimbursement of $5250 per year; no credit limit
- course must be taken at an accredited institution of higher education
- reimbursement tied to successful course completion (grade of C or better)
- reimbursement tied to retention (clause specifying a period of time that an employee needs to remain employed at the University of Wisconsin-Madison following completion of the course)

Provide as much flexibility as possible in scheduling when a course overlaps with an employee’s work hours.

*The Benefits team is continuing to work with the Employee Development team on recommendations related to Tuition Assistance. Following May feedback on Phase 2 recommendations, the Employee Development team will make a recommendation on reimbursement for courses that are not related to an employee’s current job.*

Tuition Assistance for Family Members
With reservations, we do not recommend that tuition assistance be provided for an employee’s dependent or partner/spouse at this time.

(Vote: split vote: 4 team members voted yes, 1 team member voted yes with reservations, 5 team members had serious reservations and voted no)

Reservations

Our first priority should be tuition assistance for employees.

Offering tuition discounts or tuition remission for family members would be financially costly

Offering tuition discounts or tuition remission for family members would generate political controversy. We are a public university. Offering financial assistance to employees’ family members would be perceived as unfair, especially during a period of rising tuition. Doing so could also create a (mis)perception that employees’ children have an “inside edge” in admission.

Many university employees hold secondary or post-secondary degrees. Tuition assistance for family members could widen, rather than reduce, the gap between “haves” and “have nots” and further privilege an educated class.

Tuition assistance is offered at about half of our peer institutions but may be a vanishing benefit: for example, a bill pending in the Illinois legislature would end tuition discounts for faculty and staff.

"Life Enhancers"

Community Service
Allow all employees to participate, with pay, in an annual day of voluntary community service. Models for this annual opportunity include the Academic Staff Day of Service (held during furloughs), and the United Way Day of Caring.

Help university employees live the Wisconsin Idea by offering grants (50% paid leave matched with an employee’s accrued paid leave) to perform community service.

Offer a gateway through which employees can learn about community service opportunities and donation programs on campus (e.g., blood drives, food bank, cell phone collection, eye glass collection).

Wellness Program
Support and build upon UWell ([http://uwell.wisc.edu](http://uwell.wisc.edu)), which offers a valuable clearinghouse for resources and programs that promote health and well-being, and highlights opportunities to meet and learn alongside colleagues from other parts of campus. Examples:

- Promote flexible scheduling: support employees’ commitment to build exercise into the work day.
• Continue annual flu clinics and offer additional health screenings (blood pressure, cholesterol).
• Create opportunities to practice UWell’s nutrition advice (hosting a campus farmer’s market, offering hands-on opportunities to cook and enjoy healthy foods).
• Organize an annual health fair for the entire campus community.

Child Care, Dependent Care & Elder Care Referrals

Offer a single resource and referral source that assists employees in learning about and finding accredited child care, dependent care, and elder care options.

Develop new support networks in our campus community and offer education and resources for employees with dependent and elder care responsibilities, similar to parent education programs and resources offered through the Office of Campus Child Care & Family Resources.

Parking & Transportation

Continue and expand alternative transportation options:
• Continue the Employee Bus Pass Program.
• Advocate for additional express bus routes to shorten commute times and encourage more employees to take advantage of the Madison Metro Bus Pass offered to employees.
• Expand the Vanpool Rideshare program to include employees who live in Madison but far from campus and the city center.

We support the Transportation Services 2012-2013 payment policy that will allow smaller payments throughout the year for most employees (pretax payroll deductions from all “A” and “B” biweekly payroll checks; 9, 12 or 24 deductions based on the permit holder’s payroll status).

Address anger and frustration related to permit cost increases and increasing requests for permit holders to accommodate special events parking. In “special event” lots where parking is resold, provide a price reduction or refund to permit holders. Continue to avoid displacing permit holders.

Discounted Services

Charge an employee advisory committee to develop, publish, and regularly update a list of goods and services that companies are willing to offer at a discount to University of Wisconsin-Madison employees.

Benefits for Trades Employees

The current compensation and benefits model for Trades employees was established more than thirty years ago, in the 1970’s. The state adjusted prevailing wage has been frozen since 2009. We need to learn what Trades employees and the university need now and for the 21st century.

We recommend conducting a focused analysis to identify a fair and competitive benefits and compensation structure for University of Wisconsin-Madison Trades employees.

The analysis should include longitudinal data on recruitment and retention. Within the past year, benefits and compensation have changed for Trades employees at UW Hospital & Clinics. To the extent possible, the analysis should include recruitment, retention and satisfaction outcomes of these changes.

The analysis should reflect the university’s size, complexity, and breadth of needs, encompassing the conservation and restoration of historic buildings and systems as well as maintenance of state-of-the-art construction and equipment. The university must offer benefits and compensation that attract and retain Trades employees with expertise (knowledge, skills, abilities, certifications & licensures) at a level commensurate with our unique institutional needs.
Bringing Trades employees into the benefits system our team recommends would give them new access to the following benefits:

- paid leave (4-6 weeks of vacation, allocations include 36 hours of personal holiday)
- employer contribution to State Group Health Insurance premiums
- eligibility for Tuition Assistance (certifications and licensures)
- eligibility for Leave Share
- eligibility at retirement for Supplemental Health Insurance Conversion Credits (SHICC)
- a single contribution to retirement (Currently, Trades employees are required to make two contributions toward retirement: a 9.5% contribution to the Wisconsin Retirement System required by the terms of the 2007-2009 agreement – contribution in effect since 1 July 2005, and a 5.9% contribution to the Wisconsin Retirement System required by Act 10.)

The link between benefits and compensation created by the adjusted state prevailing wage is the biggest challenge to bringing Trades employees into the proposed benefit system. It is not yet clear how the proposed compensation structure would affect wages for Trades employees. If the analysis suggests there is not a competitive need to continue using the state adjusted prevailing wage, and Trades employees receive a competitive/market wage in the new compensation structure, we believe they should receive the same benefits provided to other university employees.

What major alternatives were considered?

Options discussed by the HR Design – Benefits team are recorded in the appendices to this document.

Were there dissenting opinions?

Nearly all HR Design – Benefits team decisions reflect a high degree of agreement. Split/changed votes are recorded in this document. Other preliminary polls are recorded in the appendices to this document.

What are the dependencies and interdependencies with other work teams?

Our work dovetails with that of the Compensation team. Benefits are a critical component of the total compensation package.

We have worked collaboratively with the Employee Development and Workplace Flexibility teams to develop recommendations on Tuition Assistance. Following May campus engagement sessions, the Benefits and Employee Development team will make a unified recommendation on reimbursement for courses that are not related to an employee’s current job.

Workplace Flexibility recommendations on scheduling may afford new opportunities for employees to meet personal and family responsibilities without using accrued leave.

What development or implementation challenges do you anticipate?

Securing additional resources for Benefits Services is a prerequisite for effective implementation of our recommendations. Anticipated costs include (but are not limited to):

- developing and providing educational workshops and materials for HR managers, payroll & benefits specialists, supervisors and employees
- implementing e-enrollment (further development of OHR e-Benefits walk-through prototype)

HRS re-coding may be required (e.g., changing leave allocations for classified employees from a calendar year to fiscal year, changing accrual rates for sick leave).
Increasing vacation allocations will be a challenge for minimum staffing operations.

Identifying dental and vision service providers state-wide may be a limiting factor in developing a single dental benefit and a single vision benefit to serve all employees.

We anticipate legislative challenges related to:

- possible differences between UW System and University of Wisconsin-Madison benefits
- statutory changes required to eliminate 2-month waiting period for employer contribution to health insurance premiums (if Employee Categories proposal does not move forward)
- ICI changes required for new employee categories and recommended by our team
- creation of a new SHICC benefit, and efforts to create a legislative solution for SHICC
- mitigating financial hardship to employees caused by Act 10 requirements for higher premium contributions and co-insurance out-of-pocket payments for State Group Health Insurance and the new employee contribution to WRS retirement
- advocating at the federal level to end “Imputed Income” for domestic partner health insurance, and implementing equity related payment to employees with family health insurance covering a domestic partner and dependents (“grossing up”)

What change management challenges are anticipated?

We know that employees are concerned about loss or further erosion of benefits and incurring additional out-of-pocket expenses for health care and retirement.

Employees have expressed concerns about changes to current leave practices.

We anticipate that employees also may express:

- feelings of loss or anger related to the recommended elimination of some supplemental insurances
- frustration or anxiety about the learning curve for open enrollment in new supplemental benefits
- a sense their voices were not heard, distrust, cynicism if they don’t see their suggestions among the team’s final recommendations.

We need to communicate with each other in ways that both humanize system changes and help all of us focus on the “big picture.”

With respect to leave benefits for employees who do not currently earn vacation (including C-Basis faculty and academic staff, limited term employees and short-term academic employees) or whose leave is managed differently (Graduate Assistants, Trades employees), there may be friction if a group is not included in the recommendations outlined above, and wants to be included – or, conversely, is included but does not want to be included.

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