

## Complimentary Enrollment for Employees, Volunteers, and Extension Instructors; and the Lifelong Learning Pass HR300

Last Reviewed: November 2014

### Intent

Employees, instructors and volunteers collectively define our workforce; and our retirees represent the leadership upon whose work we continue to build. To ensure the connection of our work to the classroom experience and student life; provide exposure to novel and advanced methodology; to promote the development of mentoring relationships between instructors; and to extend a benefit to staff employees and instructors, Extension provides for complimentary enrollment opportunities.

(These complimentary enrollment programs are distinguished in their intent from the institutional and departmental guest discount programs described in policy IR400 which are intended to stimulate new audience, attract new instructors, and recognize persons who have provided service to the division. They are also distinguished in their intent from the employee-training program described in policy HR301.)

### Eligibility for Complimentary Enrollments

- **Employees.** Employees with a career appointment become eligible immediately upon hire. Employees with a limited ("casual") appointment of 50% or higher become eligible three months from their date of hire. Employees with a flex-time limited appointment of 49% time or less become eligible six months from their date of hire, provided s/he has actually worked at 50% time or more averaged over the immediately preceding three month period. (Continuing eligibility of casual staff at any time requires 50% time worked in the immediately preceding three months from the date of application, as certified by the employee's supervisor/unit manager.)

Eligible employees are allotted one complimentary enrollment in an Extension course or lecture series per quarter which they may use personally or offer to a member of their family; as well as a 50% discount on an unlimited course or lecture series which they may use personally or give to a member of their family if the first full comp is used. Eligible employees are also allotted one complimentary enrollment per quarter in a one-day program. In addition, employees are entitled to a waiver of the application or certificate counseling/services fee for any UCLA Extension certificate program in which they may enroll. This employee complimentary enrollment supplements both the 25% discount provided all UCLA employees (see policy [IR400](#)), and the "training comp" which specifically addresses on-the-job training (see policy [HR301](#)). "Family" for the purpose of this policy shall mean a spouse or registered domestic partner, or a dependent child who may be claimed as such on the employee's Federal Income Tax Return. (If not restricted to the household, the value of the fees waived for *all* employee comps would have to be redefined as *gift income*

making it subject to income tax, rather than remaining tax exempt as *scholarship income* per the provisions of 26 CFR 117(d).)

In the same quarter, employees may not enroll in more than one course/lecture series first by using their own comp, then by enrolling on a complimentary basis to another class as the beneficiary of another employee.

For their full (100%) complimentary enrollment, if the requested class has no enrollment limit or if its limit is 26 or higher, enrollment will be guaranteed if there is space available at the time the enrollment is processed. If the request is for a class with an enrollment limit  $\leq 25$ , it will be held aside until two weeks before the start of the class and processed at that time if space is still available. If space is not available at that time, the petition will continue to be set aside. If there is no waitlist, the Enrollment Office will notify the program director of a pending complimentary enrollment to facilitate his/her consideration for approval to oversubscribe the class and enroll the student.

The Registrar shall from time to time report on the financial effect of changing the threshold limit of this provision. Procedurally, employees submit petitions for complimentary enrollment directly to the Enrollment Office.

- **Volunteers.** Volunteers working as *Friends of Extension* and other sanctioned volunteer groups become eligible for complimentary enrollments after a six-month probationary period. They earn complimentary enrollment at a rate of one hour of instruction for every hour worked. Volunteer coordinators are responsible for recording hours of service for each volunteer, and debiting their service-hour-accrual for complimentary enrollments by the total number of class hours undertaken. Residual service hours accrued become forfeit twelve quarters following termination or resignation. Service hours may be applied toward enrollments for either the volunteer, or a member of his/her family. "Family" for the purpose of this policy shall mean a spouse or registered domestic partner, or a dependent child who may be claimed as such on the volunteer's Federal Income Tax Return.

To ensure that program departments are not financially impacted by volunteer comps, Student Services' volunteer coordinator will set aside requests for limited enrollment classes until the day before the second class meeting, admitting volunteers into only those classes that remain open.

Because the exchange of accrued volunteer hours for enrollment is allowed only for available seats that would have otherwise gone empty, the seats taken have no tangible value. The value of the complimentary enrollment therefore does not constitute a form of bartered labor incurring tax liability.

- **Extension Instructors.** Extension Instructors become eligible the quarter before their course is offered. For each planned and contracted Extension course, Instructors may enroll on a complimentary basis in one course of

comparable format (either course/lecture series, or one-day/single weekend) the quarter before, the quarter of, or two quarters following instruction. They may either use this complimentary enrollment, or they may transfer the benefit to a member of his/her family. "Family" for the purpose of this policy shall mean a spouse or registered domestic partner, or a dependent child who may be claimed as such on the instructor's Federal Income Tax Return. (If not restricted to the household, the value of the fees waived for *all* instructor comps would have to be redefined as *gift income* making it subject to income tax, rather than remaining tax exempt as *scholarship income* per the provisions of 26 CFR 117(d).)

- Requests of instructors seeking enrollment into unlimited classes will be honored. To ensure that limited courses are not oversubscribed with discounted enrollments, instructors' requests will be subject to review and approval by program departments.

## Limitations and Restrictions

- **Fees:** Complimentary enrollment in Extension classes covers instructional costs only. Costs for such items as housing, meals, materials, lab fees, etc. will be paid by the recipient. (Note: some class fees include these additional costs; others do not. Where consumable/*per capita* expenses are included in course fees, they will be identified as "non-discountable" in the enrollment system: the Registrar will collect such fees at the time the complimentary enrollment is processed.)
- **High Fee Classes:** the maximum amount that will be waived for a staff employee in a standard class for which he/she or his/her family member is otherwise eligible is \$1,000. For the staff employee only, if the class meets over more than one quarter, he or she is eligible for a \$1,000 waiver for each quarter of attendance while consuming his/her allotment for each quarter. For example, with a class or term project that meets over four quarters and costs \$2,100, the full amount will be waived and three comps will be consumed. With a class or term project that meets over two quarters and costs \$3,100, \$2,000 will be waived, two comps will be consumed and the balance will be owed. For instructors and volunteers, their family members and family members of staff, complimentary enrollment in class and term programs priced higher than \$1,000 is at the discretion of the sponsoring department.
- **Limited Enrollment Courses:** Enrollment limits are established to automatically close courses that must meet in specific rooms when the room's capacity is reached; or to automatically close courses that are designed for small group instruction when the instructor's capacity is reached. Courses are "limited" when so listed in the Extension catalog. Enrollment limits are established for room capacity considerations only when relocation opportunities are restricted or unavailable.
- **Unlimited enrollment courses:** CEs will determine whether or not the course will carry based on the *equivalent enrollment statistic* available in departmental management reports. *Equivalent enrollment* is the number of student FTE who would theoretically be enrolled had everyone paid the fee in full.

- **Travel and Field Study programs.** The availability of complimentary admission to travel and field study programs is at the discretion of the department offering the program.
- **UCLA Classes/Concurrent Enrollment.** Except as may be permitted by the Dean, complimentary enrollment privileges and other forms of discount are not available via the concurrent enrollment program.
- **Transferability.** Complimentary enrollments may not be sold by eligible employees or instructors, nor resold or otherwise transferred to other persons under any circumstances.

## The Lifelong Learning Pass

Employees who retire from the Division of Continuing Education with 15 years of service earned within the division receive the Lifelong Learning Pass (LLP). Presentation of the LLP at the UCLA Extension Registrar's office entitles the registered owner and one companion to enroll in two courses per quarter. Complimentary enrollment for Lifelong Learning Pass holders is encouraged in classes not likely to fill. It is therefore allowed in all unlimited classes, and in large limited classes where the limit is greater than 150. For classes with limits less than 150, the LLP complimentary enrollment will be allowed if a space is available on the third business day following the first class meeting, provided the enrollment deadline has not passed.

## Petitions, Recording and Reporting

*Student and Alumni Services*, on its intranet site, will provide petition forms to facilitate enrollment in these discount programs. The Registrar will provide reports, cost center by cost center and annually, showing the total complimentary enrollments attributable to each of these programs, the total fees waived, the enrollments into limited classes which closed, and the total revenue presumably displaced.

## Reference and Listing

This policy will not be publicly listed. Questions and comments are welcomed by the *Director of Student Services/Registrar*, (310) 825-9971; [Register@uclaextension.edu](mailto:Register@uclaextension.edu).

- UCLA Extension. [IR 400 Special Fee Waivers, Honoraria, Work-in-Kind, and Institutional Discounts](#). *UCLA Extension Policies and Procedure*, Institutional Relations and Marketing.
- UCLA Extension. [HR 301 Employee Work-related Training](#). *UCLA Extension Policies and Procedures*.