

UNIVERSITY of PENNSYLVANIA

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IN THIS ISSUE

- 2 On the Cover: Korean Studies at Penn
Benefits Redesign: Report and Meetings
Council Agenda: Benefits and Other Topics
Grants for Undergraduate Course Development;
Alumni Funds for Students in the College
- 3 Deaths: Dr. Koelle, Dr. Kleinzeller,
Photographer Frank Ross

COMPASS Features

- 4 Kidnapped by Books
- 6 On the Shelf: Books by Penn Faculty;
At PennMed, Practicing Disabilities

7 OPPORTUNITIES

- 10 PennPrintout Digest
- 11 Update, CrimeStats
- 12 Benchmarks:
The New World of Technology Transfer

Pullout: For Comment:
Benefits Programs:
Review and Recommendations



For Korean Studies at Penn: A \$5 million commitment was made last week when President Judith Rodin and Ambassador Joungwon Kim—who also heads the Korea Foundation—signed an agreement for the University and the Foundation to endow professorships in Korean Studies. See *On the Cover*, p. 2.

Photo by Jake Wong, courtesy of *The Daily Pennsylvanian*. Illustrations at left, courtesy of Van Pelt-Dietrich Library's East Asian Bibliographer Karl Kahler, show a Tiger by Sim Sa-jong (1707-1770), on a background of calligraphy in the Chinese style and in the Korean *hangul*, from the 1447-48 *Dictionary of Proper Korean Pronunciations of Chinese Characters*.

On the Cover

Korean Studies: \$5 Million for Chairs

The Korea Foundation of Seoul and the University of Pennsylvania signed an agreement last week to commit \$2.5 million each to create an endowment of Korea Foundation Professors in the School of Arts and Sciences.

Funding will support the endowed professors' salaries, expenses for their academic activities, and other program elements such as visiting professors, graduate fellowships, academic research, conferences, seminars, and the expansion of the Korean collection in Van Pelt-Dietrich Library.

One chair will be in the humanities, one in the social sciences; and if possible, a third discipline will be determined at a later date, said President Judith Rodin, but Korea is to be the "primary focus of their academic research," she added.

Penn's Korean Studies programming already featured course offerings, links with Korean universities, and outreach, the President said. "Our need, so generously addressed with this agreement, is to increase the number of Korean specialists on the faculty to create a critical mass in the discipline."

Penn has offered instruction in Korean language since 1984 and conducts a special summer internship program in which students are housed with Korean students at Kyung Hee University in Seoul, noted SAS Acting Dean Walter Wales.

Korean Studies originated at Penn in 1963 when Chong-sik Lee, one of the nation's leading analysts of Korean affairs, joined the political science department of Penn and began teaching a course on Korea. Now full professor of political science, Dr. Lee continues to participate in Korean Studies along with Dr. G. Cameron Hurst, III, a Medieval historian who is professor of Japanese and Korean Studies; and Director Youngro Song of the Korean Language Program. Dr. Hurst is also graduate chair of AMES (Asian and Middle Eastern Studies and director of the Center for East Asian Studies.

University Council Agenda

Wednesday, February 12, 4-6 p.m.
McClelland Hall, The Quadrangle

Members of the University who wish to attend as observers should so indicate by calling the Office of the Secretary, 898-7005.

- I. Approval of the minutes of January 22, 1997 meeting
- II. Reports of the President and Provost, and of the chairs of the Steering Committee, Graduate and Professional Student Assembly, Undergraduate Assembly, Penn Professional Staff Assembly, and A-3 Assembly
Reports and clarifications: 30 minutes.
- III. Proposed Policy on Acceptable Use of Electronic Resources (see *Almanac* February 4, 1997).
Presentation 10 minutes, discussion 20 minutes.
- IV. Council Committee Progress Reports on Personnel Benefits (see *Almanac Supplement* this issue, for Benefits Redesign)
Presentation 10 minutes; discussion 20 minutes.
Community Relations.
Presentation 2 minutes; discussion 8 minutes.
International Programs.
Presentation 2 minutes; discussion 8 minutes.

In Print: Benefits Review & Recommendations

In a 12-page Supplement to this issue, the Benefits Advisory Committee presents for Comment its *Review and Recommendations*, with a call for input and a prognosis for action in March with a view to implementation for the coming fiscal year.

The report is on the agenda of Council tomorrow (see below left) and will be the subject of a Senate Executive Committee Meeting to be announced. Other meetings are to be held with faculty, staff and administrative groups to discuss the plan, according to Committee chairs Dr. Barbara Lowery, Associate Provost, and H. Clint Davidson, Vice President for Human Resources. Those for general-group attendance will be published in *Almanac* or posted to *Almanac Between Issues* (see <http://www.upenn.edu/almanac>).

PPSA on Benefits: February 17

Monday, February 17, noon-2 p.m., in Bodek Lounge, Houston Hall there will be a one-hour presentation from Human Resources/Benefits Redesign Committee followed by one-hour for Q & A. In order to get as many questions answered as possible, PPSA Chair Marie Witt said, professional staff may e-mail specific questions in advance of the session; send to witt@pobox.

Grants for New Undergrad Courses: March 17 Deadline

As part of the 21st Century Project for the Undergraduate Experience, the Council of Undergraduate Deans is eager to promote innovation in the undergraduate curriculum. Consequently, the Council of Undergraduate Deans invites proposals for new courses that would be designed to enhance the educational experience of the students in the four undergraduate schools.

We welcome a broad range of proposals, and we are especially eager to receive those that would do one or more of the following: (a) enhance research opportunities for undergraduates; (b) promote the quantitative skills of undergraduates; (c) promote innovative courses in the residences, especially those initiated by students themselves; (d) foster cross-school educational opportunities; (e) promote students' working on common projects in groups.

Funding will be provided to help with the initial construction of the courses. Requests may be made for release time for course development, graduate assistance in course construction and teaching assistance the first term the course is offered, and some equipment and supplies. The goal of funding is to support course development, not to provide money for the ongoing routine expenses of instruction. Those courses which are especially successful as models would be the basis of future expansion and could anticipate additional funding in subsequent years. The maximum amount to be awarded will be \$20,000, with the intention that the amount would support the offering of the course for two years.

Proposals should be submitted to the Council of Undergraduate Deans, Office of the Provost, by March 17, 1997.

— The Council of Undergraduate Deans

College Alumni Funds for Undergrads: February 28

Each year the School of Arts and Sciences offers two opportunities for students in the College to apply for funding to support special educational experiences.

- The College Research Grant program, made possible by generous gifts from the College Alumni Society, individual alumni, and friends, provides awards of up to \$1,000 to support College students' prospective research projects.

- A gift from the Association of Alumnae funds several Scholars' Awards specifically for women in the junior class of the College. These awards may be used either to support a prospective research project or to enable a student to undertake an unpaid internship.

This year, we expect to award sixteen College Research Grants and to make up to three Association of Alumnae Scholars' Awards.

Applications for both programs are available in the College Office, 133 South 36th Street, Mezzanine. To apply for research funds, students must seek sponsorship of a faculty advisor and obtain the signature of their undergraduate chair or program director. Proposals are due on February 28, 1997.

Additional information is available on the web at:

www.sas.upenn.edu/college/other_options/undergra_research_overview.html

If you have any questions, please contact my office at 898-7867.

— Robert A. Rescorla, Associate Dean for Undergraduate Education, SAS

Computer Repair: 'Fixer' Replaces DEC as Campus Agent

The Computer Connection has announced that The Computer Fixer has been selected to replace Digital Equipment Co. as the campus agent responsible for managing and performing computer repair service, authorized to diagnose and repair equipment for several manufacturers including Apple, Dell, and Hewlett-Packard.

The Computer Fixer will accept purchase order payment through FinMIS (choose the "on-campus carry-in" site for the vendor "Computer Fixer") but credit cards are also accepted. The Computer Fixer's store-front location is 201 South 38th Street, between the "BP" discount book outlet in the onetime Kelly & Cohen's location. The manager of their facility is Jay Powell, who can be reached at 898-2082.

Pickup/Deliver: The Computer Connection also announces a new delivery service to facilitate repairs by picking up equipment from departmental locations and returning it on completion of repairs. There is no additional fee for the delivery service; to arrange for it, users call the delivery manager, Tom Lachawiec, at 898-3806.

Dr. Kleinzeller of Physiology: Scholar and Survivor

Dr. Arnost Kleinzeller, an internationally known scientist who was professor emeritus of physiology in the School of Medicine, died on February 1 at the age of 82.

Dr. Kleinzeller was not only a distinguished physiologist and biochemist, but also "a gifted alchemist who transmuted savage adversity into opportunities for growth, insights, and productivity," as a member of his family put it.

His scientific work dealt primarily with how the cells of the kidney and other epithelial cells regulate their contents of water and salts, and how these cells move sugars from one side of the tissue to the other.

He was author of more than 150 scientific papers and several monographs, and edited numerous scientific series. Possibly his most notable observation was that blocking a major mechanism for extruding salt (the sodium pump) did not cause rapid swelling of renal cells. This observation contradicted the dogma of the time, delaying appearance of his report in the respected *Journal of Physiology*.

Arnost Kleinzeller was born December 6, 1914, at Ostrava, Czechoslovakia, close to the borders with Germany and Poland. He enrolled as a medical student at the Masaryk University of Brno but having determined upon an academic biomedical career took an original approach to the curriculum of the time: anticipating elements of the Curriculum 2000 currently under development at PennMed, he fashioned his own course of study, undertaking 60-70 hours of coursework at the medical school and university as he attended laboratory sessions at the medical school and also entered into research life at the laboratories of a few sympathetic scientists.

Despite neglecting those lectures at the medical school he deemed unhelpful, his family recalls, he both graduated first in his class and published his first scientific report in 1938.

With the medical degree in hand and a Ph.D. almost in his grasp, his meticulously laid plans were swept away by the winds of war. After the signing of the Munich pact, the young Dr. Kleinzeller was instructed by the Cancer Institute not to return to his laboratory. He and his brother managed to flee to England through Poland, just before the advance of the German armies. His parents were less successful. His father transiently escaped to Belgium but perished in a German death camp. His mother was



Dr. Arnost Kleinzeller

subjected to the horrors of Theresienstadt, but survived the Holocaust.

Arriving in England with limited command of English, few contacts and little support—and in the uncomfortable position of an enemy alien, due to his Austrian birth certificate—Dr. Kleinzeller characteristically made the most of the opportunities available. Within two and a half years after his arrival, he had defended his Ph.D. thesis based on work under the Nobel laureate Professor Hans Krebs, then at Sheffield, and then moved on to Cambridge postdoctoral work.

Because of his academic successes, he was asked in 1944 by the Government-in-Exile to arrange health care for the newly liberated areas of Czechoslovakia. He returned to his native country with enthusiasm, but under the now-Communist regime he encountered not only continued anti-Semitism but a growing xenophobia toward those like himself who had been "tainted by the West." Despite periodic demotions and transfers for whimsical political reasons, he managed to convene an international meeting on biological fluid and solute transfer in Prague in August, 1960.

The congress identified and brought together the most distinguished scientists from the international community to address the newly emerging issues of a young scientific discipline, "at a time and in a place where little science was underway," a colleague recalls, and reports published from the meeting played a major role in guiding research in this discipline over the next two decades.

He and his wife Lotte escaped to the West, finding temporary refuge with Professor Aser Rothstein in Rochester, and then a position in the department of physiology at the University of Pennsylvania, where he continued his scientific activities for the remaining 30 years of his life.

At Penn he established the collaboratively-edited scientific series "Current Topics in Membranes and Transport" with Academic Press, made annual working visits to the Mt. Desert

Marine Biological Laboratory in Maine, and retained strong contacts with colleagues in Europe. Among other honors, he was elected to the prestigious Academia Leopoldina, and to the College of Physicians of Philadelphia.

Dr. Kleinzeller's experiences under totalitarian regimes led him to campaign for international scientific freedom as a member of the Committee on Scientific Freedom and Responsibility of the American Association for the Advancement of Science. His experiences in forging his own curriculum in the highly ordered academic environment of Czechoslovakia between the world wars, and his later participation in imaginative educational enterprises in England left him with a strong commitment to strengthening graduate biomedical education.

Tested by lung cancer in 1977, bladder cancer a decade later, cardiac arrest in Mexico and a near-fatal cranial neuritis in 1993, Dr. Kleinzeller suffered a recurrence of lung cancer in 1995. Until the last weeks of his life he continued to write scholarly articles. He also organized a small cadre of colleagues to examine whether theses currently submitted for the Ph.D. degree are sufficiently broad in scope to meet what should be the standard of scholarship at the University of Pennsylvania.

He was also active as coordinator, with Dr. Zoltan Domotor, of the *convergenza* that members once tried calling the Informal Interdisciplinary Research Group in the Foundations and Methods of Biological Sciences—but which became better known as the Schmoozers. At *Almanac's* invitation Dr. Kleinzeller and Dr. Domotor wrote a Benchmarks essay called "Schmoozing: Interaction Beyond the Bounds of Academic Disciplines" which appeared on the back page of the September 10, 1996 issue.

Dr. Kleinzeller is survived by his wife and companion of 53 years, Lotte Reuter Kleinzeller; two daughters, Anna Romancov of Prague and Jana Richman of Forest Hills, NY; and three grandsons.

—based on contributions of family and colleagues of Dr. Kleinzeller

Frank Ross, Photographer

Samuel "Frank" Ross, a widely known photographer whose pictures of the University of Pennsylvania account for some 20 years of its visual history, died on February 1 at the age of 85. His photographs of Penn remain in the University Archives, where he donated his University-related files on retiring in the early 1980s.

Mr. Ross had made his national and international reputation on the *Saturday Evening Post* from 1945 until 1960. But when the magazine moved to New York City, Frank Ross elected to stay in Philadelphia, where he had begun his career in 1927 as an errand boy for the old *Philadelphia Ledger* and shot for the *Philadelphia Daily News* and *The Inquirer*.

Among his photographs were the first nuclear submarine under the Arctic ice pack and experimental rocket launches in White Sands. Stationed in Japan during the Korean War, he was later imprisoned in Cuba in the 1950s, but still managed to pass his film to a Pan Am pilot, who delivered it to New York so that his photographs were published in the *Saturday Evening Post* the following week.

Mr. Ross is survived by his son, Charles F.; his daughter, Joanne Collins; a sister; six grandchildren; and six great-grandchildren.

Death of Dr. Koelle

At the end of the week, *Almanac* learned of the death of Dr. George Koelle, the distinguished professor of pharmacology whose work with enzymes changed the field of pharmacology and its stature as a discipline.

Dr. Koelle was 78, and it is believed that his death was caused by a pulmonary embolism. He is survived by his wife, Dr. Winifred Jean Angenent Koelle, sons Peter, William and Jonathan, two granddaughters and a brother.

Information on his career and contributions will be published next week.

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OPPORTUNITIES at PENN

Listed below are the job opportunities at the University of Pennsylvania. To apply please visit:

University of Pennsylvania Job Application Center
Funderburg Information Center, 3401 Walnut Street, Ground Floor
Phone: 215-898-7285

Application Hours: Monday through Friday, 9 a.m.-1 p.m.

Positions are posted on a daily basis, Monday through Friday, at the following locations:

Application Center—Funderburg Center, 3401 Walnut Street (Ground level) 9 a.m.-1 p.m.

Blockley Hall—418 Guardian Drive (1st Floor and 2nd Floor)

Dental School—40th & Spruce St. (Basement-across from B-30)

Houston Hall—34th & Spruce St. (Basement-near the elevators)

Wharton—Steinberg Hall-Dietrich Hall (next to Room 303)

Job Opportunities and daily postings can also be accessed on the Human Resources web page

(www.upenn.edu/hr/). A position must be posted for seven (7) calendar days before an offer can be made. Full descriptions of jobs posted prior to this week can also be found on the H.R. web page.

The University of Pennsylvania is an equal opportunity employer and does not discriminate on the basis of race, color, sex, sexual or affectional preference, age, religion, national or ethnic origin, disability or veteran status.

WHERE THE QUALIFICATIONS FOR A POSITION ARE DESCRIBED IN TERMS OF FORMAL EDUCATION OR TRAINING, PRIOR EXPERIENCE IN THE SAME FIELD MAY BE SUBSTITUTED. POSITIONS WITH FULL DESCRIPTIONS ARE THOSE MOST RECENTLY POSTED.

ARTS AND SCIENCES

Specialist: Sue Hess

INFO. SPECIALIST II (121605SH) Provide software, hardware, and consulting support for 60-node research-oriented lan that supports diverse group of researchers using software, ranging from word processors to simulation programs on "high-end" networked IBM clone PC's; requires making PSC's growing library of software available to LAN users, as well as monitoring individual researchers' desktop computing environments; requires development of "user-helpful" computing environment that takes into account the particular requirements of PSC researchers. **Qualifications:** BA/BS pref. or equiv. exp.; one year exp. in diagnosing hardware problems on IBM PC clones & diagnosing software problems under DOS and/or Windows; exp. with LAN mgmt. for PC clones, esp. LanServer; familiarity with Novell a plus; one yr. exp. in programming computers for statistical research with exp. in stat. packages such as SAS, SPSS, or STATA; exp. with Win NT & UNIX an advantage; able to write software & hardware usage instructions. **Grade:** P5; **Range:** \$29,664-38,677; 2-7-97 Sociology Coordinator IV (01105SH) P4; 1-28-97 SAS Computing Info. Mgmt. Spec. I (0168SH) P4; 1-28-97 Penn Lang. Ctr. Info. Sys. Spec. II (01104SH) P3/P5; 1-29-97 SAS Computing Prog. Analyst II (01103SH) P6; 1-30-97 SAS Computing Research Spec. JR./I (111410SH) P1/P2; 1-16-97 Biology; R.S. JR./I (111410SH) P1/P2; 1-29-97 Bio. Admin. Ass't II (01102SH) G10; 1-30-97 SAS-Ext. Affairs Office Admin. Ass't II/III (0166SH) G10/G11; 1-28-97 CGS

DENTAL SCHOOL

Specialist: Clyde Peterson

DIRECTOR II (01118CP) Responsible for counseling dental students, both pre-doctoral & post-grad, on financial aid; manage School's financial aid program; coordinate student activities including orientation & graduation; liaison with student organizations; manage student billing & records incl. recommendation program; general administration responsibilities incl. special projects. **Qual:** BA/BS or equiv.; three-five yrs. exp. in admin. position of higher ed.; knowledge of financial aid regulations; supervisory exp. **Grade:** P5; **Range:** \$29,664-38,677 2-4-97 Fiscal Operations **OFFICE ADMIN. ASSISTANT II** (0117CP) Perform administrative clerical duties in support of dept. administration; record & monitor budget actions; assist in processing payroll & purchasing actions; compile & summarize financial data for reports; respond to standard inquiries; organize & maintain record & filing systems; modify/implement changes to routine office/clerical procedures; type & proof-read financial forms & summaries; maintain supplies; FinMis experience necessary, FinMis training desirable. **Qualifications:** Completion of high school business curriculum & related post high school training or equivalent; at least two yrs. Administrative clerical accounting; working knowledge of office procedures; ability to type at least 45 wpm.; Excel knowledge required. **Grade:** G10; **Range:** \$19,261-23,999 2-3-97 Fiscal Operations

ENGINEERING/APPLIED SCIENCE

Specialist: Clyde Peterson

Research Spec. IV (0146CP) P6; 1-17-97 MSE Tech, Electronic II (101303CP) G10; 1-16-97 Computer & Education Tech Services **Systems Analyst III** (0145CP) P8; 1-21-97 CIS

EXECUTIVE VICE PRESIDENT

Specialist: Sue Hess

ACCOUNTANT I (02154SH) Perform subsidiary ledger review & reconciliations; prepare financial statements and billings in accordance with federal grant and contract guidelines or other sponsored program agreements; interact with Univ. Billing Administrators. **Qual:** BA/BS in Accounting or equiv.; one-two yrs. exp.; working knowledge of Lotus 1-2-3; excellent verbal & written communication skills. **Grade:** P2; **Range:** \$22,351-29,098 2-7-97 Comptroller **BENEFITS SPECIALIST II** (02159SH) Counsel new employees on the full range of University benefits including analysis of costing and proposed programs; calculate and explain defined benefit pension payments and maximum exclusion allowances and effectively communicate complex materials; proven ability to conduct presentations before large, small, and diverse audiences. **Qualifications:** BA/BS degree, pref. in Business Administration; two-three yrs. benefits exp.; excellent oral and written communication skills; understanding of benefits regulations; exp. presenting seminars or group presentations; exp. in counseling employees; exp. with defined benefit and defined contribution retirement plans desirable; progress toward professional certification pref.; benefits exp. pref. at professional level. **Grade:** P4; **Range:** \$26,986-35,123 2-7-97 Benefits Office **DINING MANAGER II** (0171SH) Manage staff, union employees, & student workers; responsible for ordering, receipt, storage & issuing of all food, equip. & paper supplies; oversee cash receipts & petty cash; prepare operational budget; supervise renovation projects; ensure sanitation standards; maintain equip.; coordinate service contracts; maintain stock; conduct periodic meetings & provide customer service. **Qualifications:** BA/BS degree in Hotel, Restaurant, Institutional, or Business Mgmt. or related field; three to five yrs. exp. in food service operations, with at least two yrs. exp. in supervising cash food operations at commercial restaurant or Univ. environment; understanding of declining balance & cash operations pricing technique; exp. with union practices; excellent communication skills; exp. with computer production systems; HACCP Certification req. **Grade:** P4; **Range:** \$26,986-35,123 2-7-97 Dining Svcs. **EXECUTIVE CHEF** (40 HRS) (0140SH) Direct, train & assist kitchen staff in all food production for cafeteria, a la carte restaurant, banquets & students kosher dining rooms according to established menus & guidelines; maintain high standards for presentation, organization & sanitation; direct supervision of Production Manager, Cooks, Pantry & Utility Staff; work in conjunction with the Club Director & Catering Manager to insure member satisfaction. **Qualification:** Culinary school graduate or four year college degree with five-

Hiring Salary Ranges

University of Pennsylvania Human Resource Services/Compensation. Effective July 1, 1996

Monthly-Paid Positions

Grade	
P01	\$20,291-26,368
P02	22,351-29,098
P03	24,617-31,982
P04	26,986-35,123
P05	29,664-38,677
P06	32,857-42,591
P07	36,050-46,814
P08	39,655-52,015
P09	43,569-57,217
P10	48,822-64,066
P11	56,135-70,246
P12	65,611-80,031

Weekly-Paid Positions

Grade	35 Hrs/Week	37.5 Hrs/Week	40 Hrs/Week
G04	\$11,743-14,471	\$12,581-15,504	\$13,420-16,538
G05	12,875-15,811	13,795-16,940	14,714-18,069
G06	14,008-17,201	15,009-18,429	16,010-19,658
G07	14,935-18,592	16,002-19,919	17,068-21,247
G08	16,171-20,240	17,326-21,686	18,481-23,132
G09	17,614-21,991	18,872-23,562	20,130-25,133
G10	19,261-23,999	20,637-25,713	22,013-27,427
G11	20,497-26,008	21,961-27,866	23,425-29,723
G12	22,866-29,509	24,500-31,617	26,133-33,725
G13	25,132-33,270	26,928-35,646	28,723-38,022

All non-exempt, weekly paid staff members are covered by the provisions of the Fair Labor Standards Act. Please refer to the Human Resources Policy #302, Overtime Compensation and/or Compensatory Time.

ten yrs. Progressive cooking experience in a private club, a la carte dining, cafeteria, banquets & Kosher dining; strong management & culinary skills; computer literate; prior experience with computer food management programs; strong experience working within union environment; serve Safe certified; hands-on results oriented individual with the ability to communicate effectively in team environment. **Grade/Range:** Blank 2-3-97 Faculty Club

SENIOR TRAINING AND DEVELOPMENT CONSULTANT (02160SH) Plan, develop, and implement strategic training and development programs; consult with organization's leadership to assess and address management and organizational needs to meet major goals and objectives having significant business impact; provide consulting and training expertise and present programs to support the strategic initiatives of performance management, organizational change management, customer service, and information technology utilization; market and evaluate training & development programs and build partnerships across the organization. **Qualifications:** Master's degree in organization behavior/organization development or related field; PhD degree in organization dev./organization behavior/educational psychology or related field is preferred; demonstrated exp. as expert in strategic training processes; progressive, responsible overall exp. as an internal/external training and dev. consultant. **Grade:** P10; **Range:** (to be commensurate with experience) 2-7-97 Training and Development Manager II (0171SH) P3; \$24,617-31,982 1-29-97 Dining Services

Parking Attendant (0141SH) Union 1-17-97 Transportation Parking **Telecom. Svc. Ass't, Sr.** (37.5 HRS) (11451SC) (Schedule may require some evenings & weekends) G11

GRAD SCHOOL OF EDUCATION

Specialist: Clyde Peterson

Admin. Assistant III (0136CP) G11; 1-23-97 IRHE; A.A. III (0155CP) G11; 1-23-97 IRHE

GRAD SCHOOL OF FINE ARTS

Specialist: Clyde Peterson

Coordinator II (0183CP) (End date: 1/30/98) P2; 1-29-97 Architectural Archives

LAW SCHOOL

Specialist: Clyde Peterson

Information Specialist II (0105CP & 0106CP) P5; 1-9-97 Computer Services

MEDICAL SCHOOL

Specialist: Ronald Story/Janet Zinser

CLINICAL DEPARTMENT ADMINISTRATOR I (01131JZ) Develop strategic financial plans & work with Director & faculty; supervise staff of seven; prepare & administer annual budget (approximately 5.5 million annually); man-

age budgets; prepare reports; negotiate financial & personnel agreements; liaison with HUP regarding capital & operating budget; oversee billings & collections & daily operations of clinical practice; liaison with University financial officers. **Qualifications:** BA/BS or equiv. required; five-seven yrs. exp. in business administrations; experience in academic medical institution strong pref.; extensive experience with grant administration, incl. NIH grants; experience with practice management, IDX pref.; proficient with PC applications, particularly spreadsheet. **Grade:** P6; **Range:** \$32,857-42,591 2-5-97 Inst. for Environmental Medicine. **COORDINATOR II** (02151RS) Assist in implementation of fund development and strategic planning activities, including management of resource materials responding to fund development research requests & coordination of IOA Consultation Service; coordinate & track IOA promotional activities including policy seminars, lecture series, speakers' bureau, development of brochures, & presentation materials; coordinate news releases & contacts; manage IOA booths; assist with special projects; perform clerical and administrative functions to support the Deputy Director, Administration, & IOA staff; assist in development, coordination, & writing of grant proposals. **Qualifications:** BA/BS or equiv.; two yrs. exp. coordinating projects; knowledge of marketing, public relations & development strategies or practices; knowledge of academic issues, programs, & organization; knowledge of geriatrics and gerontology or related medical disciplines preferred; working knowledge of computer (Macintosh, PC, and software packages such as PowerPoint, Excel, & Word). **Grade:** P2; **Range:** \$22,351-29,098 2-7-97 IOA

HEALTH SYSTEMS PHYSICIAN (01139RS) Serve as general internist at Radnor Satellite facility; perform 50 hrs. per of high quality teaching; participate in Divisional Conferences, meetings & seminars; participate in Radnor practice coverage schedule, including nights & weekends. **Qualifications:** MD, Board Certification (or board eligibility) in internal medicine; current PA State Medical license & DEA license required; one-three yrs. clinical experience in an academic setting preferred. (End date: 5/1/98) **Grade/Range:** Blank 2-4-97 General Medicine

PROGRAMMER ANALYST II (01135JZ) Formulate queries of clinical databases; collaborate with staff in development criteria used to select populations; develop improved mechanisms for data access; collaborate on statistical analysis. **Qualifications:** BA/BS required; MS preferred in computer science; three yrs. experience; five yrs. working in hospital environment; knowledge of IS, ESP, IDX, TDS, SMS & CERNER; database development & access. **Grade:** P6; **Range:** \$32,857-42,591 2-6-97 Medicine

RESEARCH SPEC. JR (021263RS) Assist in planning experiments; perform routine experiments & assist in analysis & writing of research reports; attend lab meetings, monitor equip., maintain logs & records, and order supplies. **Qualifications:** BA/BS in scientific field; previous tissue and lab culture exp. desired; must work independently. **Grade:** P1; **Range:** \$20,291-26,368 2-7-97 Pathology

RESEARCH SPECIALIST, JR. (01127RS) Recruit, retain & track subject; perform survey questionnaires, body measurements assessment & interviewing; assistance in protocol planning; data collection, management & analysis; maintenance of subject log. **Qualifications:** BA/BS or equivalent experience in scientific or social science field; exposure to lab work; computer skills. (On-going contingent upon grant funding) **Grade:** P1; **Range:** \$20,291-26,368 2-4-97 Psychiatry

RESEARCH SPECIALIST, JR. (01136RS) Perform lymphocyte proliferation & screening assay & tissue culture & cell separation/FACS staining; data entry & participation at lab meetings; perform literature searches & lab supply/equipment maintenance; train lower level technicians & student workers. **Qualifications:** BA/BS in scientific field; some experience preferred; knowledge of cell biology & molecular biology helpful. **Grade:** P1; **Range:** \$20,291-26,368 2-4-97 Medicine Pulmonary

RESEARCH SPECIALIST I (02162RS) Operate one of two cell sorters & tabletop cytometers for investigation; perform daily quality control and general maintenance, incl. ordering reports and monthly billing. **Qualifications:** BA/BS and one to two years of flow cytometry exp.; familiarity with Macintosh. **Grade:** P2; **Range:** \$22,351-29,098 2-7-97 Pathology

RESEARCH SPECIALIST I (02145RS) Prepare equipment system for use in experiments; perform training of experiment procedures; prepare descriptive drafts of research procedures; participate in experiment data analysis; extract scientific information from existing published literature; organize research records; participate in human environmental stress experiments. **Qualifications:** BS in science or engineering; one-three years tech working exp. in applied research; skill in draft writing of internal reports; skill in assembly of research equipment systems; excellent verbal communication skills. **Grade:** P2; **Range:** \$22,351-29,098 2-7-97 Environmental Medicine

RESEARCH SPECIALIST I (01137RS) Attend meetings & informal discussion; assist in plans for research project; use prescribed tools & formal; input data & write simple programs; may recommend specific analysis; perform library searches (*bibliographic*); assist in writing procedural sections; demonstrate techniques to students & train lower grade technicians; recommend & follow safety procedures; keep logs, write lab reports & plot charts/graphs; monitor minor equipment maintenance & calibration. **Qualifications:** BA/BS or equivalent; one-three yrs. experience; experience in all aspects of histology including tissue presentation & fixation embedding, sectioning (*paraffin & frozen*), histo-chemical staining, immuno-histochemistry (*histochemical & immuno-fluorescence*) & light fluorescent microscopy; experience with in situ hybridization. (On-going contingent upon grant funding) **Grade:** P2; **Range:** \$22,351-29,098 2-4-97 Medicine/Gastroenterology

RESEARCH SPECIALIST I (01128JZ) Fabricate devices to be used as part of MR coils, exercise apparatus, physiologic monitoring or other purposes to be placed in or around MR magnet; assist in design of devices; maintain records of time & materials & individual projects; maintain adequate stock of MR compatible materials; participate in meetings. **Qualifications:** Experienced machinist; experience in fabricating devices for various types of MR instruments, including small bore vertically oriented instruments & wide bore human MR instruments required. **Grade:** P3; **Range:** \$24,617-31,982 2-4-97 Radiology

RESEARCH SPEC. II (02169RS) Perform routine molecular biological analysis of genetic material for identification of disease causing alleles in humans; perform computational analysis of diseased genes; perform data analysis with use of computer; write lab reports, maintain equipment, & order lab supplies; monitor expenses; attend talks, lab, & associations meetings; suggest protocols & experimental design; supervise literature searches; train & direct students & other lab techs. **Qualifications:** BA/BS in science or equivalent exp.; three to five yrs. exp.; exp. in molecular bio. pref. **Grade:** P3; **Range:** \$24,617-31,982 2-7-97 Genetics

RESEARCH SPECIALIST II (02150RS) Work with plasmid construction and preps, northern and western blotting, & tissue culture; maintenance of cell lines & general lab organization; assist PI in plan for research project; research specific experiment design; assist in writing procedural section of reports; attend laboratory meetings & informal discussions; monitor grant expenses & funding; input computer data & write simple to complex programs; conduct library bibliographic searches; demonstrate techniques to students & train other research specialists; recommend, monitor, & follow laboratory safety procedures; keep logs, write lab reports, & plot charts/graphs. **Qualifications:** BA/BS in a related field; three to five years of related research exp.; exp. with recombinant DNA/molecular biology and tissue cell culture is desired; exp. with RNA isolation, northern blotting, immunohistochemistry, & in situ hybridization of mouse & rat tissues required. **Grade:** P3; **Range:** \$24,617-31,982 2-7-97 Gastroenterology

RESEARCH SPECIALIST II (01126RS) Perform assessment of brain-damaged patients with clinical & experimental paper-&pencil tasks; participate in design development & production of new tasks; perform data analysis with statistical programs; perform data entry into data base library, graphic searches & assist in writing method section of papers; attend group meetings; maintain lab equipment & other supplies. **Qualifications:** BA in psychology, BS in biology or equivalent; two-three yrs. experience; care with impaired of handicapped population helpful; exposure to lab work; computer background desirable. **Grade:** P3; **Range:** \$24,617-31,982 2-4-97 Neurology

RESEARCH SPECIALIST II (01129RS) Perform experiments in effects of gene on cellular lipid metabolism & atherosclerosis using variety of techniques including but not limited to somatic gene transfer, molecular & cell biology, protein purification, nucleic acid purification, construction of recombinant vectors, tissue culture of mammalian cells, breeding, handling & dissection of rodent for harvesting & preparation of tissues, quantitative histologic analysis & photography of tissue specimens, various blotting techniques & hybridization; implement & establish new protocols; analyze lab data & write lab reports & papers; assist PI's in supervising & training other laboratory personnel. **Qualifications:** BA/BS in scientific field req.; MS in scientific field pref.; some knowledge of biochemistry, cell biology & techniques preferred; three-five yrs. lab experience in working with protein biochemistry, tissue culture & histologic techniques required; ability to work independently, excellent organizational & interpersonal skills & knowledge of computers required. (End date 4/30/99) **Grade:** P3 **Range:** \$24,617-31,982 2-4-97 IHGT

CLINICAL TEST TECH (40HRS) (01138RS) Phototherapy-administer light treatments to patients as well as apply medications; assist Clinical Studies Nurse in writing consent forms & filling out appropriate for Clinical Studies; supervise CRC with infusion therapies, recruit for Clinical Trials;

escort study patients to exam rooms & dispense study medications; assist in answering phones & scheduling appointments; collect data, maintain equipment & supplies. **Qualifications:** H.S. graduate; at least two yrs. experience in health related profession with direct patient contact; experience can include, LPN, phlebotomist, medical assistant, x-ray technician, physical therapy aide or EKG technician; previous phototherapy experience highly desirable. **Grade:** G11; **Range:** \$23,425-29,723 2-5-97 Dermatology

RESEARCH LAB TECH III (40 HRS) (02146RS) Do variety of lab procedures, ranging from routine to complex in nature, in study of behavioral genetics & alcoholism; maintain logs; data entry & initial analysis; assist in preparing reports & grants; conduct library research; maintain supplies and equipment. **Qualifications:** BA/BS in bio. science or related field; computer skills and laboratory exp. pref. **Grade:** G10; **Range:** \$22,013-27,427 2-7-97 Psychiatry

RESEARCH LAB TECH III (40 HRS) (02147RS) Perform a variety of laboratory procedures, ranging from routine to complex in nature, in a study of behavioral genetics & alcoholism; maintain logs; data entry & initial analysis; assist in preparing reports & grants; conduct library research; maintain supplies and equipment. **Qualifications:** BA/BS in biological science or related field; computer skills and laboratory exp. preferred. **Grade:** G10; **Range:** \$22,013-27,427 2-7-97 Psychiatry

RESEARCH LAB TECH III (40 HRS) (02148RS) Perform lab techniques ranging from routine to complex (i.e. assays, cultures, tissue processing, & microscopy); data entry, data management, & data analysis; maintain logs, assist in grant and paper preparation; assist in planning protocols & research design; maintain supplies & equipment; perform library searches; train and assign student workers. **Qualifications:** BA/BS in biological science or related field; lab exp. required; computer skills preferred. **Grade:** G10; **Range:** \$22,013-27,427 2-7-97 Psychiatry

RESEARCH LAB TECH III (40 HRS) (02149RS) Perform lab techniques ranging from routine to complex (i.e. assays, cultures, tissue processing, & microscopy); data entry, data management, & data analysis; maintain logs, assist in grant and paper preparation; assist in planning protocols & research design; maintain supplies & equipment; perform library searches; train and assign student workers. **Qualifications:** BA/BS in biological science or related field; lab exp. required; computer skills preferred. **Grade:** G10; **Range:** \$22,013-27,427 2-7-97 Psychiatry

SECRETARY V (37.5) (02168JZ) Type, edit, & proof standard to complex/confidential correspondence, reports, & manuscripts; gather data; field phone inquiries to Chair's Office; copy, collate, & handle incoming/outgoing mail & documents; develop & maintain structured filing systems & records; compose correspondence & forms; maintain & operate office equipment; order supplies & maintain inventory; assist in special event planning & conference planning. **Qualifications:** Completion of HS business curriculum & related post HS training or the equivalent; four years increasingly responsible secretarial exp.; type 60 wpm, strongly preferred; thorough knowledge of word processing & spreadsheet software applications, preferably MAC-based; ability to operate standard office equipment; excellent oral & written communication skills. **Grade:** G10; **Range:** \$20,637-25,713 2-7-97 Psychiatry

Ass't Dir. V (0176JZ) (End date: 1/31/99) P6; 1-29-97 IHGT Bus. Mgr. IV (0129JZ) P7; 1-15-97 Radiation Oncol. Coordinator III (0187JZ) P3; 1-29-97 Psychiatry; C. IV (0134JZ) P4; 1-15-97 Faculty Affairs

Database Tech II (091139JZ) P7; 1-13-97 CCEB Fiscal Coord. I (0177JZ) (On-going contingent on grant funding) P1; 1-24-97 Cr. for Exp. Therapeutics

Office Systems Administrator I (0197JZ) P2; 1-29-97 IHGT Prog. Analyst IV (11472JZ) P8; Genetics; P.A. IV (0117JZ) P8; Gen. Med.; P.A. IV (01106JZ) P8; 1-31-97 Genetics

Research Spec., JR. (0170RS) P1; 1-23-97 Psych.; R.S., JR. (01116RS) P1; 1-31-97 Rad. Oncol.; R.S., JR./I. (0164RS) P1/P2; 1-28-97 Genetics; R.S., JR./I. (0189RS) P1/P2; 1-28-97 Genetics; R.S. I (01108RS) P2; 1-30-97 Genetics; R.S. II (0611479RS) P3; 1-21-97 Ophthalm.; R.S. II (0188RS) P3; 1-28-97 Neuro.; R.S. II (0195RS) (End date: 1/31/99) P3; 1-28-97 IHGT; R.S. II (01110RS) P3; 1-31-97 Ophthalm.; R.S. III (01115RS) P3/P4; 1-31-97 Derm.; R.S. IV (01107RS) P6; 1-30-97 Genetics

P-T Clinical Spec. (20 HRS) (96101325) P6; 1-21-97 Med. Admin. Ass't I (40 HRS) (121571JZ) G9; IHGT Clerk IV (01114JZ) G7; 1-31-97 Institute on Aging

Office Admin. Assistant III (37.5 HRS) (0131JZ) G11; 1-15-97 Biochemistry & Biophysics

Secretary V (01119JZ) (End date: 2/28/99) G10; 1-31-97 IHGT

NURSING

Specialist: Ronald Story

Assoc. Director (0126RS) P7; 1-14-97 Nursing Admin. Ass't III (40 HRS) (0157RS) G11; 1-20-97 Nursing

PRESIDENT

Specialist: Sue Hess/Janet Zinser

CLERK V (01109JZ) Alphabetize, sort & file confidential alumni & donor info.; research alumni, donors & institutions named in source materials to ascertain relationship to Univ. or other alumni; prepare stacks for incorporation of graduating class files; track down & ensure return of missing files; assist staff members in file retrieval & tracking; assist with data entry duties, problem solving & data access issues. **Qual.:** H.S. grad; one-two yrs. related exp.; data entry exp. pref.; excellent reading & organizational skills; able to extract info from written materials & file according to varied subject matter; good interpersonal skills; able to lift & carry 25 lbs. or more; able to climb ladder. **Grade:** G8; **Range:** \$16,171-20,240 2-6-97 Dev. & Alum. Rels. Assoc. Dir. III (0142JZ) P5; 1-15-97 Dev. & Alumni Rels. Assoc. General Counsel (0178SH) P11; 1-28-97 Gen. Cnsl. Coordinator III (070160JZ) P3; 1-21-97 School/Ctr. Progs.; C. III (0167SH) P3; 1-28-97 WXPIN
Fin. Administrator I (0150SH) P3; 1-17-97 Secretary
Radio Host (0156SH) P4; 1-24-97 WXPIN
Admin. Ass't III (37.5 HRS) (0139SH) (*Schedule may require evening hours & wknds. as needed to complete assignment*) G11; 1-17-96 University Press; A.A. III (40 HRS) (0185SH) G11; \$23,425-29,723 1-28-97 President

PROVOST

Specialist: Clyde Peterson

BUSINESS MANAGER II (01113CP) Prepare & review administration & control of budgets on University's FinMis system, custody of special fund accounts & prepare financial reports; set up when necessary & oversee systems & procedures for all financial transactions; prepare budgets & revisions. **Qualifications:** BA/BS with experience in business administration & accounting; at least five yrs. progressively responsible experience in business or institutional administration; budget administration exp. desirable; computer expertise important; performing arts knowledge helpful. **Grade:** P5; **Range:** \$29,664-38,677 2-3-97 Annenberg Center
OFFICE ADMIN. ASS'T I (01120CP) Schedule reservations for educational groups to visit Museum's collections; greet & organize groups; keep records of tour payments & deposit tour income weekly; keep attendance stats for annual reports at end of year; schedule volunteer guides to give gallery presentations. **Qual.:** H.S. grad or equiv. pref.; two yrs. clerical exp.; exp. in archaeology &/or anthro. helpful; good interpersonal skills, attention to detail & able to work under pressure; familiarity with computer operation essential. **Grade:** G9; **Range:** \$17,614-21,991 2-3-97 Museum
TECH. ELECTRONIC III (01101CP) Troubleshoot & repair CRT projector systems & LCD projection devices; perform preventive maintenance on classroom equip.; install new classroom equipment at multiple sites on campus; maintain inventory of supplies; & records; respond to technology problems (*either via direct repair or through outside service agreements*) communicate with others involved in classroom support essential. **Qualifications:** H.S. grad; graduate of tech school (*CET pref.*) minimum three yrs. related work exp. in electronics; excellent interpersonal, organizational & time management skills essential; ability to deal with wide range of technology assignments & environments; basic understanding of DOS/Windows & Mac systems & ability to use e-mail; proficiency with electronic test equipment; exp. repairing CRT projector systems & LCD projection devices; previous exp. in a University community pref. **Grade:** G11; **Range:** \$20,497-26,008 2-4-97 ISC/ACS
Ass't Coach III (0147CP) P6; 1-21-97 Football
Assistant JIO (0143CP) (*Schedule may require some evenings & weekend hours*) P5; 1-17-97 Student Conduct
Coord. III (070148CP) P3; 1-21-97 Football
Data Analyst II (0132CP) P6; 1-21-97 Data Admin.
Info. Sys. Specialist II (0175CP) P5; 1-24-97 ISC
Mgr. Proj. & Planning (0198CP) P10; 1-29-97 ISC
Sys. Analyst II/Sr. (0158CP & 0159CP) P7/P8; 1-24-97 ISC/
AD; S.A., Sr. (0133CP) P8; 1-17-97 ISC/AD
Admin. Ass't I (0138CP) G9; 1-17-97 ULAR; Office A.A. II (0199CP) G10; 1-29-97 Univ. Libraries
Sec'y IV (0144CP) G9; 1-17-97 Student Conduct
Ltd Svc. (Theatre Tech) (0218CP & 0127CP) G8 & G11; \$8,885-11,121 & \$11,626-14,290; 1-15-97 & 1-29-97; Annenberg Center

VETERINARY SCHOOL

Specialist: Ronald Story

RESEARCH LAB TECH III (02172RS) Help organize and do gene therapy experiments in animals; analyze; perform assays for enzyme activity & biochem. assays for glycosaminoglycans; perform sterile tissue culture for infection with viral vectors; embed & section tissue for light micros-

copy & frozen sections for histochem.; perform stat. analyses of results. **Qual.:** BA/BS in science or equiv.; research exp. with animals, biochem., tissue culture, & pathology. **Grade:** G10; **Range:** \$19,261-23,999 2-7-97 Pathobio.
RESEARCH LAB TECH III (02167RS) Prepare media & solutions; maintain tissue culture cells; set up sterile experiments; maintain records; order supplies; misc. administrative tasks; work with animals & radioactivity; wash glassware; routine equipment maintenance; perform bacteriology & molecular genetics experiments; aid graduate students & fellows. **Qualifications:** BA/BS or equivalent; one year exp. in tissue culture or molecular genetics preferred; ability to work independently & interact with co-workers. **Grade:** G10; **Range:** \$19,261-23,999 2-7-97 Pathobiology
TECH. VET I (40 Hrs) (02173RS) Position dealing with care of hospitalized large animal patients; perform daily duties of hospital & patient care coordination and emergency services; maintenance of nursing facilities & equip.; perform in a teaching capacity with other nurses & Vet. students; assist with diagnostic procedures, treatments, & wet labs; perform related nursing duties; duties may require rotating schedules & on-call duties. **Qual.:** Certified Animal Health Tech required (will consider applicant with pending certification with full understanding position will be terminated in event cert. test is not completed); able to function quickly & react to stressful situations involving patient care; exp. handling large animals, esp. in techniques of restraint required; good interpersonal skills, both written & oral (*Position in Kennett Square; no public transport available*). **Grade:** G8; **Range:** \$16,171-20,240 2-7-97 Large Animal Hospital
Ass't Dir., Fac./Planning & Construction (11442RS) (*Position in Kennett Square, PA; no public transportation*) P5; \$29,664-38,677 1-17-97 NBC/Admin. Services
Histotechnologist III (01112RS) (*Position in Kennett Square; no public transportation*). G11; 1-31-97 Pathobiology
Nurse Vet Ass'n/Nurse Vet Ass't II (40 HRS) (0154RS) (*Schedule may require some occasional overtime*) G5/
G7; 1-20-97 Large Animal Hospital
Research Lab Tech II/III (01111RS) (*Position in Kennett Square; no public transport*). G8/G10; 1-31-97 Clinical Studies-NBC
Vet Tech/V.T. II (40 HRS) (0169RS) (*Schedule may require rotating/nights/wknd.s*) G8/G10; 1-23-97 VHUP Wards

WHARTON SCHOOL

Specialist: Janet Zinser

COORDINATOR III (01141JZ) Oversee day-to-day management of a significant new research program being jointly sponsored by two of Wharton's research Centers, Risk Management & Decision Processes Center & Financial Institutions Center; administrative logistic support including budgets, data bases & conferences; coordinate internal & external communications, including meetings, program reports & publications. **Qualifications:** BA/BS; two-four yrs. administrative exp.; previous Wharton or Penn work exp. a plus. **Grade:** P3; **Range:** \$24,617-31,982 2-5-97 WFIC
INFO. SYS. SPECIALIST III (01124JZ) Manage Novell NetWare 3.12 network with Hewlett-Packard Pentium Server & 48 client PCs & Macs; manage user accounts, network server software, large datasets, application, Internet e-mail, printers & equipment; provide solutions for remote access to network & Internet; develop & enforce application standards & site licenses; develop & administer system back-up & disaster recovery procedures; train dept. faculty, doctoral candidate & staff on network usage incl. e-mail apps. **Qual.:** BA/BS or equiv.; one-two yrs. exp. providing personal computer & network support, plus computer training incl. formal training in at least one programming language; familiarity with end-user computing requirements in academic environment; excellent interpersonal skills; ability to work & communicate with clients with wide range of tech expertise; able to deliver high level of service & work independently. **Grade:** P5; **Range:** \$29,664-38,677 2-5-97 WCIT
MANAGER IV (01125JZ) Assist in managing CEBS progs.; coordinate development & production activities with Wharton Int'l Foundation, publishers & ETS; supervise, plan & integrate work of consultants, temp. workers, contractors & review committees; overseer for courses involving audit finance & employee benefits funding; establish procedures & implement protocols to maintain & audit quality assurance in nation wide computer delivery network; coordinate budgetary review & administer financial operations; maintain database of academic records for nation-wide student population & test delivery systems; participate in analyze & assessing industry & student trends; manage office. **Qual.:** BA/BS req.; CEBS pref.; knowledge of employee benefits; excellent verbal, written, communication & interpersonal skills; editorial skills; ability to develop plans; prepare & present reports; demonstrated exp. with analysis of complex financial issues & problem solving skills; proficiency with computers, database security & maintenance & various software incl. Word Excel, PowerPoint, WordPerfect & FinMis. **Grade:** P5; **Range:** \$29,664-38,677 2-5-97 CEBS

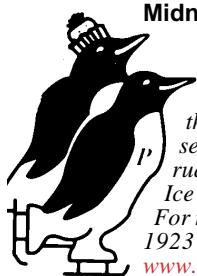
MEDIA TECH SPEC. (121577JZ) Provide complete tech support for faculty instruction & presentations; manage & maintain computing systems, software & hardware used in classrooms, incl. PC's, LAN, UNIX workstations, classroom computers and AV stations; assist faculty in use of these systems, in design & authoring of graphics, multimedia, interactive WWW pages & computer based digital media; formulate & implement computing solutions & strategies; instruct & support faculty in use of a-v & video conferencing technology; participate in video & computer display production for use over Penn video network channel; maintain Behavioral Research Lab; research & evaluate developing technologies, software & computing systems for implementation. **Qual.:** BA/BS or equiv.; strong interpersonal skills; able to work & communicate with users with wide range of tech exp.; strong organizational & leadership aptitude; 3-5 yrs. exp. in computing support, operations, software dev., multimedia authoring or other relevant areas; proj. mgmt. ability & proven organiz. skills; able to lift 50 lbs.; exp. with MS-DOS; UNIX, MAC OS, Windows, TCP/IP, IPX, X-windows, Ethernet, C, Visual Basic; extensive exp. with PC apps., multimedia authoring & presentation software, knowledge of IBMPCs compatibles, Macs, UNIX workstations, incl. peripherals; exp. with video/digital video helpful. **Grade:** P6; **Range:** \$32,857-42,591 2-4-97 WCIT
PROG. ANALYST II (02152JZ) Do detailed program analysis, design, coding, testing, debugging, documentation, implementation & support of admin. info. systems on PC, LAN, client server & Web environments; support admin. users & their IS requirements for data storage, manipulation, reporting & analysis; analyze, customize, implement & support vendor-supplied info. systems; provide support to users on PC apps., Novell or NT network & data access; work closely with appropriate users & management; document all aspects of project. **Qual.:** BA/BS in computer science or MIS or equiv. pref.; two-three yrs. progressively responsible programming & system exp., pref. with production-level multi-user systems; strong expertise in C, Perl or Pascal req.; knowledge of additional languages, Web dev., Visual Basic, Visual C++ or Java pref.; thorough working knowledge of relational database technologies incl. SQL & ODBC capabilities; knowledge of Oracle, Ingres, Informix or Sybase server highly pref.; thorough knowledge of UNIX or NT; db server tuning knowledge pref.; demonstrated knowledge to communicate effectively; exp. with Univ. IS, esp. in support of specialized admissions, a plus; demonstrated customer service skills. **Gr.:** P6; **Range:** \$32,857-42,591 2-6-97 WCIT
ADMIN. ASS'T I (01122JZ) Serve as receptionist; greet & direct guests & calls; maintain faculty schedules; process requests for classroom support & facilities; assist preparation of mass mailings & conference; maintain office supply inventory; provide support with word processing; type, file, fax & compile materials for various projects. **Qual.:** Completion of H.S. business curriculum; two yrs. related exp.; excellent customer service skills; demonstrated initiative; good verbal & written communication skills; able to coordinate multiple tasks; excellent organizational skills. **Grade:** G9; **Range:** \$17,614-21,991 2-5-97 Real Estate
ADMIN. ASS'T III (01123JZ) Maintain & organize office filing systems, schedule appointments & make travel arrangements, receive & screen phone calls & mail; maintain office equip. & expense records, make purchases, represent supervisor in absence, respond to press & media inquiries, handle confidential materials, prepare course syllabi, audiovisual materials, textbook & bulkpack; liaison with other admin. depts.; compile annual & biannual reports, research, analyze & summarize data; format statistical reports & tables; provide & prepare research info; arrange focus groups. **Qualifications:** H.S. grad; BA/BS strongly pref.; two-four yrs. exp. at AAI or equiv.; excellent computer skills; DOS & Windows-based operating systems, WordPerfect, WordPro, MS Word 6.0, Lotus, Excel, Power Point, must have exp. in creating relational databases & reports; extensive knowledge of e-mail, Internet systems & conducting on-line library searches; excellent communications & research skills; able to compose, proof & edit documents; exp. in calendar management & conference planning. (*Ongoing contingent on grant funding*) **Grade:** G11; **Range:** \$20,497-26,008 2-5-97 Health Care Systems
Info. Sys. Specialist III (11130JZ) P7; 1-20-97 WCIT

Classifieds

FOR RENT: A spacious room in Powelton Village. Pine floors, built-in bookcases, walk-in closets. Freshly painted, clean. Private phone. Free laundry & utilities. Ideal for visiting scholar, graduate student. \$350/month. Please call (212) 979-8260.

VACATION: Pocono Chalet, 3BR/1B, near Jack Frost/BB; Firewood incl. \$375/week-end, 215-898-9928.

PENN PRINTOUT



Midnight Valentine: 2-for-1 Skating

Bring a friend: 2-for-1 admission with PENNcard to the midnight to 2 a.m. skating session on Friday night, February 14, at the Class of 1923 Ice Rink. Skate rental is \$1.50. For more information: call 898-1923 or visit their web site: www.upenn.edu/icerink

Update

FEBRUARY AT PENN

FITNESS/LEARNING

17 *Discount Medical Book Sale*; many current titles priced 75-90% off original price; 11 a.m.-4:30 p.m.; Harrison Room, Penn Tower Hotel; more info: 482-1904 (The Book Exchange). Through Feb. 18.

The University of Pennsylvania Police Department Community Crime Report

About the Crime Report: Below are all Crimes Against Persons and Crimes Against Society from the campus report for **January 21 through February 2, 1997**. Also reported were **Crimes Against Property**, including 25 thefts (including 1 burglary, 1 theft of auto, 5 thefts from auto, 5 of bicycles & parts, 9 incidents of criminal mischief & vandalism; 3 incidents of trespassing & loitering; 1 of forgery & fraud. Full crime reports are in this issue of *Almanac* on the Web (www.upenn.edu/almanac/v43/n21/crimes.html). — Ed.

This summary is prepared by the Division of Public Safety and includes all criminal incidents reported and made known to the University Police Department between the dates of **January 27 and February 2, 1997**. The University Police actively patrol from Market Street to Baltimore Avenue and from the Schuylkill River to 43rd Street in conjunction with the Philadelphia Police. In this effort to provide you with a thorough and accurate report on public safety concerns, we hope that your increased awareness will lessen the opportunity for crime. For any concerns or suggestions regarding this report, please call the Division of Public Safety at 898-4482.

Crimes Against Persons

34th to 38th/Market to Civic Center: Robberies (& attempts)-1; Simple assaults-1;

Threats & harassment-2

1/27/97	3:43 PM	Biomed Bldg # 1	Terminated employee making threats
1/27/97	11:12 PM	Quad Office	Harassing calls received
1/29/97	11:46 PM	Hopkinson Dorm	Unwanted e-mail received
1/30/97	7:30 PM	3600 Blk Locust	Harassment by unknown male
1/30/97	8:26 PM	Guardian Drive	Tow drivers harassed by operator of previously towed car
1/31/97	2:25 AM	37th & Locust	Complainant struck in nose/Taken to HUP
1/31/97	3:56 PM	Med. ExAM lot	Complainant harassed by son
1/2/97	2:55 PM	Lot # 17	Purse taken/arrest

38th to 41st/Market to Baltimore: Robberies (& attempts)-3; Aggravated assaults-1;

Simple assaults-2; Threats & harassment-2

1/27/97	11:36 PM	41st & Pine	Attempted robbery by male/no injuries
1/27/97	11:58 PM	4000 Blk Spruce	Cash taken by unknown male
1/28/97	3:22 AM	40th & Spruce	Robbery by unknown males in vehicle
1/29/97	10:19 AM	416 S. 41st	Harassment by collection agency
1/30/97	3:16 AM	3900 Blk Spruce	Complainant struck in head & stomach/taken to HUP
1/2/97	8:22 PM	4009 Chestnut	Man with knife apprehended
2/2/97	3:23 AM	100 Blk 39th	Fight on highway/adjusted by police
2/2/97	1:06 PM	Harrison House	Harassing calls received

41st to 43rd/Market To Baltimore: Robberies (& attempts)-3

1/27/97	11:28 AM	44th & Pine St.	Robbery by male with simulated weapon
1/27/97	11:25 PM	100 Blk 42nd	Complainant robbed of currency
1/27/97	11:31 PM	200 Blk 42nd	Complainant robbed of currency

Outside 30th-43rd/Market-Baltimore: Robberies (& attempts)-2

1/28/97	8:23 AM	4300 Pine St.	Attempted Robbery by unknown males
1/2/97	12:04 AM	300 Blk N. 36	Complainant's/robbed by unknown male

Crimes Against Society

34th to 38th/Market To Civic Center: Disorderly conduct-1

1/30/97	7:50 PM	3600 Blk Chstnt	Male cited for disorderly conduct/also wanted on warrant
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38th to 41st/Market To Baltimore: Disorderly conduct-1

1/31/97	10:13 PM	4000 Blk Pine	Juveniles cited for disorderly conduct
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41st to 43rd/Market To Baltimore: Weapons offenses-2

1/28/97	8:01 PM	43rd & Locust	Male with weapon/arrest
1/31/97	9:58 PM	4100 Blk Pine	Male with weapon/arrest

18th District Crimes Against Persons

12 Incidents, 1 Arrest reported between **January 27 and February 2, 1997**, by the 18th District; covering Schuylkill River to 49th Street, Market Street to Woodland Avenue.

1/27/97	11:00 AM	4400 Pine	Robbery
1/27/97	3:30 PM	1414 Hanson	Robbery
1/27/97	11:29 PM	11 42nd St.	Robbery
1/28/97	11:30 PM	4208 Spruce	Robbery
1/28/97	3:15 AM	4000 Spruce	Robbery
1/28/97	10:45 PM	1 43rd St.	Robbery
1/28/97	1:15 PM	4840 Spruce	Robbery
1/28/97	11:49 PM	217 42nd St.	Robbery
1/29/97	9:15 AM	4700 Walnut	Robbery
1/29/97	11:30 PM	4740 Chestnut	Robbery
1/30/97	12:01 AM	4653 Walnut	Robbery
2/2/97	5:30 PM	3945 Chestnut	Robbery

Arrest

Newman Center

Activities held at the Center, 3720 Chestnut St.
12 *Augustine's City of God*; reading and discussion; 7-8 p.m.; Through April 23.

13 *Bible Study*; reading of the Gospel of Mark; 12:30-1:30 p.m. Continues through May 1.

MUSIC

12 *Curtis Organ Restoration Society Spring 1997 Free Wednesday recital series*; artist Ken Cowan; noon; Irvine Auditorium (Office of Student Life Activities & Facilities). Concert Feb. 26 by William Miller.

TALKS

12 *Crafts and Art in Experimental Sciences*; Martin Perl, 1995 Nobel Laureate in Physics; 4 p.m.; Rm. A1, DRL (SAS External Affairs).

14 *Histories of African Leisure*; Charles Ambler, University of Texas, Austin; noon; Room 421, Williams Hall (African Studies).

Polygamy, A Lost Right of Man? An 18th-C. Population Controversy in France; Carol Blum, SUNY-Stony Brook; 3 p.m.; Room 329A, 3401 Walnut (History).

17 *NGOs and Development: Some Paradoxes*; Joan Mencher, City University of New York; 3-5 p.m.; Room 103, Williams Hall (South Asia Regional Studies).

Learning, Apprenticeship, and Social Practice; Jean Lave, University of California-Berkeley; 3-4:30 p.m.; Room B-27, Graduate School of Education (GSE).

Deadline: The deadline for this weekly column is the Monday of the week prior to publication (e.g., *February 10* for the February 18 issue).



Almanac

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In Almanac April 2, 1996, the reengineering of the University's Center for Technology Transfer was outlined. Below is a progress report on the Center's efforts to help achieve the goals and objectives of Penn's Agenda for Excellence and its administrative restructuring plan.

The New World of Technology Transfer



Prudence and diligence are required in structuring and managing academic-industry relationships. Academe is interested in the creation of knowledge for knowledge's sake, freedom to publish and collaborate, and open and honest discourse of ideas. Industry is interested in product-driven R&D, knowledge for profit, confidentiality, and limited discourse. Both academe and industry are interested in development and utilization of knowledge as the basis of new products and services for the public good.

The Center for Technology Transfer (CTT) is charged with managing the University's intellectual property assets. CTT's recent re-engineering, recruitment of a new team of professionals, commitment to provide quality research support services to faculty, and new strategy have resulted in a dramatic increase in technology development and commercialization activities. Faculty have responded positively to the new strategy of turning research results into research dollars in the short-term and generating income from fees, patent reimbursements, equity, and royalties in the long-term. Year-to-date, invention disclosures are up 29%, licenses/options are up 175%, industry-sponsored research agreements are up 70% in number and 3% in funding, and material transfer agreements are up 100%.

CTT strives to preserve Penn's traditional academic values, serve a faculty increasingly interested in industry collaborations, commercialize technology, and recognize the needs of industry partners investing in our embryonic discoveries.

The technology transfer world is changing dramatically. Large companies continue to merge and realign to better exploit their marketing and distribution assets. Aside from pre-established research relationships, large companies are increasingly not interested in embryonic technology licensing opportunities from universities. However, CTT will continue to offer fundamental discoveries to large companies to attract their research sponsorship and to seek their interest in strategic alliances.

Targeting the 'Start-Up' Phase

Increasingly CTT is likely to license technology to entrepreneurial, development-stage companies. In many cases, these start-up ventures will be "virtual" organizations focusing on technology development and supporting research at Penn. Anticipating this situation, CTT has recently hired a Licensing Director with responsibility for Start-Up Business Development, Vincent di Felice.

Licensing embryonic technologies to entrepreneurial ventures requires the support and active participation of the faculty. Licensing to these start-ups, in which faculty play a founding role, presents complex challenges related to conflict of interest and commitment. Penn has in place well-conceived and established policies, guidelines, and practices to effectively manage conflicts of interest and related academic freedom and collegiality issues.

More problematic, however, in such situations is the academic tradition of freely sharing materials and information. The concern seems to be that if materials are received from Penn researchers who are involved with entrepreneurial ventures in which they can have a founding role, then any inventions that result from the use of shared materials will belong to "the investigators' company." Penn intellectual property technology commercialization licenses reserve for Penn and its researchers the right to use licensed technology for educational and research purposes. Licenses do not obligate Penn to

offer future Penn discoveries or improvements, other than those made as part of a company-sponsored research agreement, to a licensee. Further, Penn has no obligation to a licensee for inventions made by its faculty or by researchers at collaborating institutions using materials related to the license unless the new invention could not have been made without the direct use of such materials provided by Penn.

In the life sciences, this means that any biological material that is used to simply demonstrate a concept or provide a vehicle to demonstrate a concept does not result in an obligation to the licensee or research sponsor. In this case, the researcher receiving the material is free to independently commercialize resulting inventions.

In the case where a shared biological material (e.g., antibody, clone, cell line, plasmid, peptide, vector) becomes an integral part of a discovery or an element necessary in achieving an invention, Penn is obligated to license the discovery to the material provider or research sponsor. Though this limits the academic freedom of the researcher, this situation is no different from what they are experiencing when they request and use biological materials from companies or other institutions who have licensed that material to a third party.

In Case of Conflict

Increasing professional jealousy and competition among researchers has led to a heightened degree of secrecy by researchers seeking to maintain their competitive position with respect to publications, grants, contracts, tenure, and scientific recognition. In addition, in situations in which universities and researchers have stock in a company where research results can affect stock price/value some researchers may be unwilling to be collegial have their ideas and materials contribute to someone else's financial gain.

Penn's Patent Policy permits faculty with equity in start-up ventures to conduct sponsored research supported by the venture. Obviously, faculty must disclose such relationships to the Conflict of Interest Standing Committee (COISC). The COISC reviews such matters and makes recommendations to the Vice Provost for Research on how real and perceived conflicts (time commitment, financial interest, scientific integrity, and educational mission) can be managed. Penn's Patent Policy prohibits faculty from having a fiduciary role in start-up ventures based on Penn-licensed technology or from being an officer or member of the Board of Directors if the company is sponsoring research at Penn in the investigator's laboratory. Faculty, however, may be members of Scientific Advisory Boards.

A common misunderstanding or misconception is that because a start-up company is founded around a faculty member's technology, that company is "Dr. X's company." In fact, Penn policy prohibits Penn researchers from having a management position with fiduciary or decision making responsibility in a licensee in which the researcher has stock and receives sponsored research.

In summary, commercializing University discoveries through both established and development-stage organizations promotes the tri-part research/teaching/service mission of the University. Commercialization requires the support of faculty investigators. Industry collaborations promote academic productivity. Penn has fair and reasonable policies, guidelines, and practices to manage industry-university technology commercialization relationships and the real and perceived conflicts of interest such relationships create.

— Louis P. Berneman, Managing Director,
Center for Technology Transfer

Benefits Programs of the University of Pennsylvania: Review and Recommendations

To the University Community

This report is published in *Almanac* so that all Penn faculty and staff will be aware of the principles and thought processes that went into the development of the recommendations.

It also provides an opportunity for the community to give us feedback, via email at benefits@pobox or by campus mail to the co-chairs.

In addition, members of the Benefits Advisory Committee will meet during the next month with faculty, staff and administrative groups for discussion of the recommendations and for providing feedback to the Committee. It is anticipated that final decisions will be made by the President, Provost, and Executive Vice President in March, 1997, with a view to implementation for the start of the coming fiscal year.

The Benefits Advisory Committee

Dr. Barbara Lowery, Co-Chair, Associate Provost

H. Clint Davidson, Jr., Co-Chair; Vice President, Human Resources

Debra Fickler, Associate General Counsel

Stephen Golding, Vice President for Finance

Dr. David Hackney, Chair, Personnel Benefits Committee;

Professor of Radiology/Medicine

Dr. Robert Hornik, Professor of Communications, Annenberg School

Gavin Kerr, Associate Vice President, Human Resources Medical Center

Dr. David Kozart, Past-Chair, Medical School Faculty Senate Steering Committee;

Associate Professor of Ophthalmology/Medicine

Dr. Olivia Mitchell, Professor of Insurance and Risk Management/Wharton

Betty Thomas, A-3 Assembly;

Executive Secretary to the Associate Vice President of Finance

Dr. Michael Wachter, Deputy Provost

Marie Witt, Penn Professional Staff Assembly;

Director of Support Services, Business Services

Contents

I. Introduction and Executive Summary	2
II. Health Care	3
III. Tuition Remission	6
IV. Life Insurance	7
V. Paid Time Off	8
VI. Benefits to Regular Part-Time Employees	8
VII. Retirement Benefits	9
VIII. Disability	9
IX. Summary	10
Appendices	10

I. Introduction and Executive Summary *

An effective and attractive employee benefits package is vitally important to the University of Pennsylvania. Benefits that satisfy employee needs and are competitive with those provided by peer institutions, enable the University to recruit and retain excellent faculty and staff. The University's benefits package is also very important to employees, since it assists faculty and staff in achieving income protection, retirement savings, health care insurance, and professional and personal development.

The University of Pennsylvania offers a wide range of employee benefits to help pay for health care expenses; to provide retirement benefits; to protect against the loss of income due to illness, disability, or death; and to cover some portion of tuition expenses for employees and their dependents. In addition, Penn pays for legally mandated benefits such as Social Security including Medicare, unemployment insurance, and workers compensation insurance. Finally, Penn provides paid time off from work including holiday and vacation pay.

For Penn to continue to provide an attractive and competitive benefits package, the package and its cost must be skillfully managed. Penn's cost of employee benefits has been one of the fastest growing components of the University's budget over the past ten years. These costs have more than doubled, averaging an annual growth rate of 8.1%, or a total of \$75 million over this time period, and they now exceed \$139 million in FY 97. Employee benefits costs represent approximately 12% of the total University budget (excluding the University of Pennsylvania Health System). At this high level, the cost of employee benefits is negatively affecting Penn's ability to meet other critical University priorities, including maintaining and achieving competitive salaries for faculty and staff, allowing researchers to effectively compete for sponsored research grants, and providing the University with the ability to maintain a competitive tuition policy that best meets the needs of our students.

In order to conduct a careful, thorough review of Penn's benefits package and to receive advice from the University community, a Benefits Advisory Committee was appointed. The Committee included faculty members recommended by the Faculty Senate—Dr. David Kozart, Past Chair of the Medical School Faculty Senate, Dr. David Hackney, Chair of the University Council Personnel Benefits Committee, Dr. Robert Hornik, Chair of the Senate Committee on the Economic Status of the Faculty, and Dr. Olivia Mitchell, International Foundation of Employee Benefit Plans Professor of Insurance and Risk Management; leaders of the Penn Professional Staff Assembly and the A3 Assembly—Ms. Marie Witt and Ms. Betty Thomas; and senior administrators with specific benefits implementation and financing responsibilities—Mr. Clint Davidson, Mr. Stephen Golding, Ms. Debra Fickler, Mr. Gavin Kerr, Dr. Michael Wachter, and Dr. Barbara Lowery. The Committee was supported by a working subcommittee that met weekly throughout the review period to evaluate the current program, study benchmarking information from peer institutions, and develop alternative proposals for the Committee. The Committee was further supported in its work by Towers Perrin, a consulting firm specializing in human resources and employee benefits. Towers Perrin's roles were to assist in gathering and analyzing the benchmarking information, in providing information on benefits trends and the "best-practice" packages that were being adopted elsewhere, and in designing and costing a range of feasible alternatives in each area.

The work of the Committee was based on a number of critical principles including the need to maintain an attractive benefits package that meets the need of University employees; to realize a competitive benefits package; to adopt plans that conform to the best practices of

benefits design; to maintain affordable benefits for lower-wage employees; to retain those benefits that are most valued by employees; and to simplify and clarify the benefits package. It was the consensus of the Committee that the proposed changes provide employees with a benefits package exceeding competitive standards and fully satisfying these principles.

When the Committee had agreed to a set of preliminary proposals, its recommendations were taken to the University's Academic Planning and Budget Committee, which advised acceptance of the proposals after several months of deliberations and revisions. Meetings were also held with the Deans to receive their input. This broad input helped to achieve a high degree of consensus in support of final recommendations set forth in this document.

The Committee has concluded that Penn needs better management of benefits costs and control of their future growth than has occurred in the past. To achieve this, like any employer, Penn needs to conduct periodic reviews of its benefits policies and practices to ensure that they remain competitive, cost-effective, in compliance with federal regulations, and appropriate for the needs of the University and its employees. The entire benefits package has not been reviewed at Penn for 15 years. As a result, we have missed a number of opportunities to improve our benefits design and to make benefits more cost effective.

As the Benefits Advisory Committee began work last summer, major issues quickly emerged. First, it was determined that the University's retirement programs might not be in compliance with new federal tax regulations governing these plans effective July 1, 1998. Second, Penn's formula for pricing different health insurance options, adopted in 1989 and not altered since then despite major changes in the cost of our different plan options, had led to sharply declining employee payroll contributions, reaching zero and even resulting in some refunds in FY 96. This runs counter to local and national trends since 1990 of increasing employee contributions to health care coverage. Third, the PennFlex credit system for life insurance, developed as a first step in a total flex-credit program but never completed, embedded an inefficient administrative anomaly in the overall program. Fourth, the University's method of giving pre-tax contributions for employee life insurance actually had the unanticipated effect of increasing most employees' taxes. Fifth, the University's tuition program, particularly the graduate tuition remission for employees' spouses and dependents, far exceeded those provided by peer institutions. Finally, the administrative and communication complexity of the current program led to high administrative costs, while making the benefits package less understandable and consequently less valuable to many employees.

The retirement programs noted above and the University's disability benefits programs were not included in the current benefits review. They will be examined further using the principles outlined below, and recommendations concerning them will be made for comment and implementation in FY 99.

Principles

The benefits review process was driven by a set of principles that were accepted and approved by the Committee and by the Academic Planning and Budget Committee. The principles are the following:

1. The cost of employee benefits must be managed and contained while providing for a range of benefits that assists employees in achieving income protection, lifelong savings, health care, and professional and personal development.
2. Penn's benefits must be competitive in the different markets in which Penn competes for faculty (national and international), administrators (local and national), and support staff (local).
3. Penn's practices should conform to the best practices of benefits design: tax efficiency, cost-effectiveness, high value for expenditure, shared responsibility, compliance with the law, and administrative simplicity.
4. No single group should bear a disproportionate burden for benefits

* Many of the benefits of employees in collective bargaining units are governed by the provisions of the applicable collective bargaining agreement. Therefore, some of the benefits and proposed changes to benefits described in this article may not apply to employees in collective bargaining units.

cost containment.

5. Benefits that are greatly valued by employees should be retained if at all possible, although even these benefits may require change.

6. The employee benefits package must be simplified and clarified while allowing for meaningful choice, in order for employees to better understand and utilize their benefits.

Proposed Changes: Health Care Insurance

Major changes proposed to the University's FY 1998 Health Care Insurance benefits are as follows: The range of plan choices should be expanded. The Plan 100 indemnity plan should be retained, along with Health Maintenance Organization (HMO) plans and the PENNCare Preferred Provider Organization. A new Point-of-Service (POS) plan should be offered, providing considerable choice through UPHS, Keystone, and out-of-network tracks.

Employee payroll contributions for all health insurance plans should be reinstated, returning to the University policy in effect between 1980 and 1994. This would raise the average employee payroll contribution to health care insurance from 11% to 17% of the overall premium in FY 1998, leaving the University with an average 83% contribution. The FY 98 percentage contribution from employees, in fact, would be slightly lower than the Penn level in effect in 1994, and would be several percentage points below those of peer institutions today.

A new prescription drug plan should be introduced for those electing an HMO plan. Balancing the prescription drug plan with the reinstated payroll contribution for the HMO, the total cost to the average employee choosing the HMO option would actually decline next year.

Tuition

The current undergraduate tuition program should be retained without change.

Special qualifying courses should be developed in the College of General Studies and the Wharton evening program to be made available in September, 1997, to employees whose admission to Penn's undergraduate program is deferred for academic reasons.

The graduate tuition program for employees should be retained without change. The graduate tuition benefit for spouses and dependents should be available only to spouses and dependents of current employees who enroll, or are enrolled, in a graduate program by the fall semester of 1998. For those individuals, the benefit would end by June 2002 or upon graduation from the specific graduate program in which the student is enrolled, whichever comes first.

Tuition benefits should be available only to employees whose salary is subject to the University's employee benefits rate.

Life Insurance

In FY 98, Penn should provide all employees, at no charge, with life insurance coverage worth 1x (one-times) annual benefits base salary. Employees will be able to purchase additional life insurance, at group rates, up to an additional four times pay. The current plan maximum should be raised from \$300,000 to \$750,000. Employee optional life insurance will be offered on an after-tax basis in order to reduce unnecessary taxation on "imputed income."

The current flex-dollar program should be eliminated. In its place, Penn should increase all current employees' base pay to compensate them for the elimination of flex credits. The amount of the adjustment would be determined as the difference between the flex credit amount that would have applied effective July 1, 1997, under the current plan, and the cost of the new plan's employer-provided benefits of one times pay. Employees should still be able to direct a portion of pay into the pretax spending accounts and pay for health insurance premiums on a pretax basis.

Paid Time Off

A single vacation accrual schedule should be designed for new staff (A1s and A3s) based on length of service. Current staff should receive the better of the new or existing paid-time-off accrual schedules. Newly-hired staff should be able to request accrued paid time off after the 120-day introductory period.

Reduced summer hours should be eliminated. The current winter vacation should be maintained.

Benefits for Part-time Employees

Benefits for part-time employees should be expanded to include the option of participation in the Health Care Pre-Tax Account with a maximum of \$1,000 and an eligibility requirement of two years of continuous service.

Future Plans

In the future, all components of the employee benefits package should be reviewed annually, in the context of the principles described above, to ensure that the University's benefits offerings continue to meet the goals of the University and its employees. Annual review and periodic adjustment should also prevent the package from straying from a cost-efficient package that conforms to best practices of benefits design.

II. Health Care

A. Review of the Current Plan

The Committee is well aware of the critical importance of health care benefits to the financial and emotional security of the entire Penn population. In order to gain a better perspective, this section provides some background on how health care benefits have been delivered at Penn through the years. Following this discussion is a brief summary of the current Penn health care benefits program as it stands before adoption of the recommended changes.

Up until the late 1970s, health care benefits at Penn were provided largely through a number of indemnity plans. These Blue Cross and Blue Shield (BC/BS) plans allowed members to seek care from any doctor or hospital.

In the late 1970s, Health Maintenance Organization (HMO) options were added to the Penn program. Over the years, the HMOs offered by Penn—Keystone, US Healthcare (USHC) and QualMed—grew in enrollment as the combination of increased benefits, reduced paperwork and typically lower payroll contributions led to heightened appeal relative to the indemnity plan.

In 1987 a new indemnity option—the BC/BS Comprehensive Plan—was offered at Penn. This plan provided reduced benefits at a payroll contribution cost lower than that of Plan 100.

The last change to the Penn health care plan was the addition of the PENNCare option in 1995. This plan is a Preferred Provider Organization (PPO) based on the network of hospitals and physicians under development by the University of Pennsylvania Health System (UPHS). This plan allows members to obtain health care from physicians within the UPHS network at 100% coverage (after a \$10 copay) without a requirement to select a primary care physician (PCP) or to receive referrals for visits to specialists. Since its introduction, this plan has garnered enrollment of about 25% of the Penn population.

In terms of the range of options, types of plans, and benefits levels, Penn's current health insurance plans can be summarized as follows:

Range of options. Penn offers health care benefits options which afford employees a high degree of choice. Within each option, employees are offered a varying degree of choice over the health care providers they prefer to use.

Types of plans (see Definitions, Appendix A). Employees currently can choose from among three different plan types: traditional indemnity, a preferred provider organization (the PENNCare PPO), and several HMO options. Each plan has differences in benefits levels, the degree of health care provider choice, rules on access to health care and (in some cases) payroll contributions.

Benefits levels. The specific benefit provisions in the Penn plans are comprehensive and competitive, with one major exception: the lack of prescription drug coverage under the Keystone and USHC HMOs is a significant disadvantage from both competitive and clinical (i.e., quality of care) perspectives.

Managed care. All plans have elements of managed care: the indemnity plans and PENNCare include provider discounts; the HMOs include provider discounts and a range of health care utilization controls.

Contributions. For plan year FY 97, employee contributions are required for Plan 100 enrollees (\$61 per month for single coverage and \$167 per month for family coverage). No employee contributions are required currently for almost all other plan options, although this was not the case before 1994. University contributions, therefore, have sustained these programs over the past two years.

Appendix B illustrates the key features of the current Penn health care options.

B. Background and Issues

1. Trends in the Health Care Insurance Market

During the program evaluation, the Committee learned about a range of current employer practices, trends and emerging initiatives in the health care insurance arena. Most importantly, broad and rapid change is affecting the health care and health insurance markets at an unparalleled rate. An important element driving innovations in the health care benefits market was the high rate of increase in health care costs in the 1980s. As part of that trend, Penn's health care costs increased more than 15% per year for 1988 through 1990. Reacting to high inflation, many employers turned more to managed care as a means of controlling costs.

Managed care plans—HMOs, PPOs, etc.—offer the potential for cost savings at the expense of some degree of choice. The reason is that managed care plans impose some tradeoffs: in return for lower charges and coverage of more health care services (e.g., preventive care), individuals agree to give up some elements of choice (e.g., over which doctors and hospitals can be used in order to obtain full benefits). Many employees have agreed to forego some elements of choice in order to obtain the higher level of benefits available under managed care plans. About 40% of the Penn population has elected coverage through an HMO which provides coverage only for services rendered by doctors and hospitals who participate in the HMO's network.

Most employers now require employees to share in the cost of health insurance through payroll contributions, and periodically find it necessary to increase the employees' payroll contributions to reflect continuing increases in health care costs. In addition to sharing in the high cost of health care, employee cost sharing serves another goal: it can make overall health care plans more cost-effective by making employees more aware of the costs of health care they receive. If they are given a range of plan options, employees can make informed economic choices about plan elections based on the actual cost and value of each plan.

2. Issues Involving Cost Sharing

The high cost of health care has placed an increasing burden on the financial resources of all employers—a burden that has contributed to stagnant rates of growth in salary and wage increases, among other things. As noted above, employers have responded by requiring employees to share in the cost of health coverage through payroll contributions for virtually all plan options. This is true of both peer universities and Philadelphia area employers.

It is an irony that employee contributions for health care coverage at Penn, however, have actually declined in recent years, in both dollar levels and as a percentage of total health care costs. As a percentage, employee contributions declined from nearly 18% in FY 95 to a projected 11% for FY 97. If no plan redesign were to take place, this percentage would decline further to about 8% for FY 98, with the University paying 92%. In the current year (1996/1997), a large majority of Penn employees make no payroll contributions for their health care insurance, although two years ago, all Penn health care plans required employee contributions. The history of employee contributions is shown in two tables in Appendix C.

The health care cost sharing approach adopted by Penn in the late 1980s—that remained unchanged despite a rapidly changing environment—

caused this erosion in employee contributions. The Penn formula set the University contribution to each plan based on a fixed percentage of the cost of Plan 100. Unfortunately, this formula did not account for employees moving to different plans. The employee population with lower health costs did, in fact, migrate from Plan 100 to the low cost plans, while higher risk employees who incurred larger amounts of health care remained in Plan 100. This increased Plan 100 costs further, thereby further increasing the University's subsidy to the other plans. With that dynamic in effect, the University's contribution for all plans, other than Plan 100, reached 100% and the employee contribution fell to 0%. Put bluntly, the costing mechanism malfunctioned.

If this costing mechanism were maintained, the Penn program would increasingly act as a primary coverage "magnet" for spouses of Penn employees who work elsewhere and who decline coverage from their own employers in favor of Penn's free options. Penn would then increasingly bear some of the health care cost burden that rightfully should be that of other employers.

A central result of the benefits redesign effort is a recommendation to re-institute payroll contributions for all health care options at Penn. Constraints on Penn's overall financial resources, and the competing needs for funds elsewhere in the University, make this step extremely necessary and important. The recommendation is that employee cost sharing will be set, in the aggregate, at about 17% of plan cost, somewhat below the 18% contribution of FY 95. This is still well below the average in the private sector, where employee contributions typically range up to 20% or higher for a more limited menu of choices.

3. Issues Involving Choice and Flexibility in Health Care Plans

The Committee recognizes that choice and flexibility within an overall health care benefits plan are important to Penn's employees. The issue of choice has two dimensions. The first dimension relates to the range of alternative health care plans such as the traditional indemnity plan, a managed care HMO option, and a PPO or POS plan. The second dimension covers choice within the plans; for example, broad selection of doctors and hospitals within a managed health care plan and an option to obtain health care from any provider as an "out-of-network" benefit.

Among peer institutions, the trend with respect to the degree of choice is clearly toward reduced choice. For example, the Committee learned that most peer universities in our survey no longer offer an indemnity option and only a minority offer a PPO plan. The most prevalent plan types include POS and HMO plans. Among Philadelphia area employers included in the assessment, over half still offer an indemnity option (perhaps because of the strong market position of the local BC/BS plan and the favorable discounts negotiated with health care providers), about one fourth offer a PPO, more than half offer a POS plan, and most offer HMOs.

The challenge for employers over the past several years has been to balance the desires of employees for a high degree of choice with the serious need to control health care benefits costs. Some employers have controlled costs by offering only those plans that include managed care cost controls built into the plan's features. Other employers have blended the attributes of a flexible benefits plan with the cost efficiencies of managed care by offering a menu of choices that allow employees to choose which option best suits their needs—with payroll contributions set for the various options to reflect their overall value, benefits levels and cost-effectiveness.

The recommendations outlined below reflect the objectives, philosophies and key concerns of a broad cross-section of the University community. Further, the new program—in terms of the elements that will change and those valuable components of the current program that will not change—fulfills the principles articulated earlier in this report.

Several elements of the recommendations need to be stressed. First, Penn's employees will be able to select the same type of health care plan that they have enjoyed in the past. An additional option, a POS plan, will be offered for the first time and will provide considerable flexibility and choice. The HMO option will be improved through the addition of prescription drug insurance.

Second, the cost sharing in the recommendation is slightly less than the percentage employees contributed in FY 95. Employee payroll contributions, across all plan options, have been a feature of Penn's health benefits

package as far back as 1980.

The proposed new health care benefit program continues to exceed competitive standards when compared both to peer institutions and to employers in other areas. The degree of cost sharing proposed for next year is less than the cost sharing of peer institutions. In addition, Penn will continue to offer more choice than most peer institutions. Health plan options that are highly valued by Penn employees—such as the indemnity Plan 100—have been retained in the new program. The PENNCare plan, while now requiring an employee payroll contribution to reflect its greater cost, will still be offered.

The new POS program allows employees access to care through three tracks: (1) a PENNCare POS track which utilizes the primary care physician network of UPHS; (2) a Keystone POS track which utilizes the primary care physician network of Keystone HMO; and (3) an out-of-network benefit. The out-of-network benefit feature makes that third track function very much like the PENNCare PPO. By adopting the POS option, employees will enjoy considerable choice at a cost lower than the PENNCare PPO option, but higher than the more managed care HMO option.

The main benefit the current program failed to provide in comparison to peer institutions was prescription drug coverage in Penn's HMOs. The recommended health care plan rectifies this deficiency. By adding the prescription drug benefit, the added cost to employees of the HMO premium is more than offset by the benefits improvement. Hence the total cost borne by employees in the HMO option should actually be reduced under the proposed plan. Obviously, the effect for each employee will depend on the extent of prescription drug usage.

The Committee believes that the proposed redesign of the health care insurance benefits will strengthen and improve them at Penn as well as make them more cost-efficient. The recommended array of health benefits options allows meaningful choice in the types of plans offered, with contributions more closely reflecting the costs of each plan.

C. Recommendations for FY 98*

A summary of the recommendations to be effective July 1, 1997 is provided in Appendix D.

- **Make no changes in the dental benefit plans.**
- **Retain the current BC/BS Plan 100 indemnity option.** While enrollment in this plan has decreased over the years, many Penn employees still find that Plan 100 best suits their needs in terms of benefit levels and freedom of access to providers. For July 1, 1997, there should be no change in benefits levels or prescription drug plan, but an increase in employee contribution cost (to \$66 per month for single coverage and \$172 per month for family).

- **Retain current PENNCare PPO.** Since the initial offering of the PENNCare PPO in 1995, enrollment in this plan has reached about 25% of the University population. It is necessary to institute employee contributions to reflect more appropriately the PENNCare PPO's range of options, benefits levels, and cost relative to other Penn options. Effective July 1, 1997, monthly contributions should be \$40 for single coverage and \$104 for family coverage. There should be no change in benefits levels.

- **Retain current Keystone and USHC HMO options.** Based on enrollment, HMOs are the most popular health benefits option at Penn. In order to enhance the appeal of these efficient and convenient programs, some significant changes are slated for July 1, 1997:

— A new prescription drug benefit should be added to the existing HMO programs. This change should improve the quality of care under the HMOs by now covering this very important element of effective treatment.

— Incentives should be added to the Keystone and USHC HMOs for members to select primary care physicians from within the UPHS network. Reduced copays should apply for office visits obtained through UPHS providers. Copays should be increased for non-UPHS providers.

— Care can still be obtained from providers who are part of the broader HMO network, but who do not participate in the UPHS network. In this case, copays for office visits would be slightly higher than copays for use of UPHS providers.

— Employee contributions should be re-instituted effective July 1, 1997. The amounts should be \$10 per month for single

coverage and \$26 per month for family coverage. These payroll deductions compare very favorably to contributions charged by most other employers regionally and nationally. Further, these amounts are less than the contributions required under the University's plan for Keystone and USHC HMO coverage prior to July 1, 1994.

- **Offer a new UPHS/Keystone Point of Service (POS) option.** Keystone HMO now offers a new option, the Keystone POS plan, that allows members to access care in two ways. Each member can decide, at the point a health care service is required, whether to seek care "in-network" or "out-of-network":

— In-network benefits would apply when services are provided by or referred by the regular Keystone HMO network of doctors, including the network of physicians available through PENNCare. Each employee who chooses this option must select a primary care physician who is responsible for providing care or for referring care to a network specialist. In-network coverage provides the highest level of benefits, generally 100% after specified copays.

— Similar to the Keystone and USHC HMOs for July 1, 1997, the new POS options should include incentives (through lower copays for office visits and no hospital deductibles) for members to obtain care through UPHS providers.

— Out-of-network (non-referred) benefits would apply when care is sought from doctors and hospitals who do not participate in PENNCare or the Keystone HMO network. No referrals are required for out-of-network care. Out-of-network care is reimbursed at a lower benefits level than in-network care, generally 80% after an annual deductible of \$200.

— Payroll contributions for the POS plan should be set at \$20 per month for single coverage and \$52 per month for family coverage. These contributions compare well to contributions charged by other employers for similar plans—and the plan provides a high degree of flexibility over how care is accessed and choice of doctors and hospitals.

- **Eliminate BC/BS Comprehensive option.*** The current Comprehensive plan has relatively low enrollment, and similar benefits would be available as out-of-network care within two other University options: the PENNCare PPO and the proposed new PENNCare/Keystone POS plan. For these reasons, the Committee recommends elimination of this option effective July 1, 1997.

- **Eliminate QualMed HMO option effective July 1, 1997.***

Note: None of the University's medical plans contain pre-existing condition exclusions. If plans are changed at Open Enrollment, no claims for benefits under the new plan will be denied because of an illness or condition that existed before enrollment in the new plan. As open enrollment approaches, employees will receive more information on each of the benefits options to be offered effective July 1, 1997.

D. Continuing Vigilance and Re-evaluation

Today, the health care cost inflation rate is running at approximately 4% and appears to be going still higher. The reasons include the continued adoption of improved, but costly, health care technologies and the aging of the population. Penn needs to monitor health care costs and plan design on a regular basis in order to keep its health benefits plan as competitive and cost-efficient as possible. The Committee recognizes that the health care situation in this country is in a state of rapid change. To the extent possible, it recommends that future decisions continue to allow for choice among different plans and for a relatively low cost plan for those who need such a choice.

* Any retirees who are currently enrolled in the Comprehensive or QualMed (Greater Atlantic) Plans will be asked to select another health care plan effective July 1, 1997. Effective July 1, 1996, newly retired faculty and staff members started to contribute toward their health care premiums. Since their contributions are based on active employee's contributions, the changes in cost-sharing described above will also affect the contribution levels for those retirees.

III. Tuition Remission

A. Review of the Current Plan

Penn subsidized a portion of tuition and fees for employees, spouses, and dependents at a cost of \$8.3 million in FY 97. The current Penn tuition remission program covers both graduate and undergraduate courses and is extended to full-time faculty, regular full-time staff, and limited service staff employees immediately upon employment. The program also provides benefits to spouses/domestic partners and dependent children of eligible employees, after three years of employment. The remission percentage varies as follows:

Percentage of Penn Tuition & Fee Remission (Undergraduate)

<i>Employee</i>	<i>Spouse</i>	<i>Dependent Child</i>
100%*	50%*	75%

Percentage of Non-Penn Tuition & Fee Remission (Undergraduate)

The University also provides tuition remission for eligible employees of 40% of Penn's tuition (approximately \$7,600 for the FY 97 school year) or the actual tuition charges (whichever is the lesser amount) for undergraduate courses taken by dependent children at other accredited institutions, to a maximum of four years per child.

Percentage of Penn Tuition and Fee Remission (Graduate)

(This benefit is limited to individuals who can gain admission to Penn's graduate schools.)

<i>Employee</i>	<i>Spouse</i>	<i>Dependent Child</i>
100%*	50%*	100%—except, 75% for Medical, Dental, Veterinary, Law and Wharton

B. Background and Issues

Undergraduate

Penn's undergraduate tuition remission plan is a vital component of the overall benefits program. It is integral to the University's efforts to attract and retain excellent faculty and staff, and it is in keeping with the principle of developing employees personally and professionally. It distinguishes Penn as an employer of choice and is a testament to the University's commitment to Penn employees, their families, and their future. The resulting improvement in workforce skills serves the mutual needs of the University and its employees. Also, the program serves to advance the University's educational mission and benefits the community as a whole.

Compared to the for-profit sector, the tuition remission plan provides Penn a unique competitive advantage. While many private employers provide limited, job-related educational benefits to their employees, few (if any), are willing or able to offer those available at Penn.

The fact that the tuition remission program generally equals or exceeds those of our peer institutions and that the tuition benefit, expressed as a percentage of the fringe benefits rate, is in the upper third of the comparison schools is evidence of the strong commitment Penn has made to this program.

Many faculty and staff have taken advantage of the undergraduate tuition remission program, both the tuition remission for Penn courses and the remission for courses at institutions other than Penn. In reviewing the plans at other universities, the Committee noted that a number of peer universities sponsor programs similar to the non-Penn tuition plan, but the benefits are often less generous. The most typical provisions are those that impose restrictions on eligibility, cumulative limits or lower remission levels. Consideration was given by the Committee to similar modifications that would limit the non-Penn tuition benefit. Consideration was given also to the fact that overhead recovery for tuition on research grants will end in the year 2000. After considerable discussion, however, it was concluded that the non-Penn tuition benefit is an important component of the University's total benefits package and, in keeping with the principles, it should not be modified.

There is one aspect of the undergraduate tuition benefit that deserves special mention. There are some Penn employees whose admission to the College of General Studies (CGS) or Wharton's undergraduate program

is deferred because they are unable to meet Penn's admission requirements. These deferrals occur for a variety of reasons, ranging from the course of study in high school, to an inadequate grade-point average, to the number of years out of school. In many instances, the undergraduate committees of schools, such as the CGS and Wharton, believe that the employee may have the academic potential to succeed at Penn and have advised the employee to strengthen his or her background to demonstrate readiness for studies at Penn by taking specified courses at approved, accredited community colleges. If the employee obtains a grade of "B" or better, the school at Penn will admit him/her.

Many of these employees are younger staff whose salaries often fall at the lower end of the University's compensation scales. This places them in the awkward position of being unable to take advantage of free tuition at the University because they cannot afford tuition at an approved, accredited community college and therefore cannot use the route described above for admission to Penn, a situation that runs counter to good human resources practices. It also runs counter to the principle of providing for the personal development of employees. The Committee, along with representatives of CGS and Wharton, considered this problem at length and recommended the solution described below under "Recommendations."

Graduate

The graduate tuition benefit has two distinct parts, the benefit for employees and the benefit for spouses and dependents. With respect to the benefit for employees, the Committee felt, as with undergraduate tuition, that the program is important to effective recruitment and retention. It also serves to enhance employee personal and professional development and thus it serves the needs of the University and its educational mission. The Committee found that the graduate tuition benefit for employees is offered at about half of the peer institutions surveyed. This benefit is clearly important to the many employees who take advantage of this benefit.

The extension of a graduate tuition benefit to spouses and dependents is rare among peer institutions. There were only two other schools in our survey that offered benefits to spouses and dependents as well as employees, and none of the local employers surveyed extend educational benefits to spouses and children. Moreover, unlike the undergraduate benefit, the graduate tuition benefit is limited to those who can gain admission to one of Penn's graduate schools. At present, this unusual benefit is provided to only 122 employees at an annual cost of \$1.3 million. In this case as well, the loss of overhead recovery of tuition from research grants in the year 2000 was considered. For these reasons, the Committee viewed this benefit to spouses and dependent children as less valuable and defensible than the graduate tuition benefit for employees and the undergraduate tuition benefit. However, its recommendation includes a safety net of two years for those already planning to use this benefit.

Finally, the Committee learned that a small group of individuals whose salaries are not included in the benefits pool nevertheless can receive tuition remission for themselves or their dependent children. While the principle of providing for professional and personal development for full-time Penn employees has guided the committee's thinking, providing such benefits to non-employees clearly runs counter to best practices of benefits design.

C. Recommendations

- Make no changes in the undergraduate tuition benefit for employees, spouses, or dependents. The current benefits with existing tuition and fee remission formulas for both Penn and non-Penn programs should be retained.
- Develop a program that allows employees whose admission to Penn is deferred for academic reasons to take special qualifying course work at Penn under the tuition benefit program beginning in September, 1997.
- Make no changes in the graduate tuition benefit for employees. Employees would continue to be eligible for 100% remission for a maximum of two courses per semester.
- Eliminate the dependent and spouse graduate tuition benefit. This benefit should be available only for spouses or dependents of current

* Maximum of two courses/semester

employees enrolled in a graduate program by the Fall semester of 1998. The benefit should cover the normal length of graduate study, but in no case more than 4 years. That is, all spouse and dependent graduate tuition benefits should cease effective June 30, 2002. The extension of the benefit for individuals who enroll by September 1, 1998 recognizes that some

individuals who are currently eligible for the benefit, but who have not yet taken advantage of it, may have missed the deadline to apply for 1997 admission.

- Provide tuition benefits only for full-time, University compensated individuals.

IV. Life Insurance

A. Review of the Current Plan

Penn currently provides group term life insurance for all regular full-time employees in the form of "Pennflex dollars" to purchase this benefit. Part-time employees who earn sufficient income are offered the opportunity to purchase life insurance. The annual cost for the current program is \$2.5 million. The maximum amount of coverage is \$300,000 and employees are required to carry minimum life insurance through the University's plan in the amount of the lesser of one times an employee's benefits base salary* or \$50,000. The level of credits is determined by an age-based multiple of the employee's benefits base salary. The amount is based on the following schedule:

Age	Coverage of annual benefits base
Under 36	4 x
36-45	3.5 x
46-50	3 x
51-64	2.5 x
65-70	2 x
Over 70	1 x

Dependent life insurance is also available to full-time faculty and staff to cover their spouses/domestic partners (\$10,000) and dependent children (\$5,000).

The current Pennflex program provides employees with flexible credits keyed to life insurance coverage. Employees may use these credits to buy life insurance, to acquire other benefits, put them in pre-tax expense accounts, or take them in cash.

B. Background and Issues

Insurance Levels

The levels of life insurance credits provided to Penn employees are higher than those of the peer institutions and local large companies surveyed. They are also higher than actual life insurance amounts Penn employees elect to buy. An analysis of Penn employee preferences indicates that many employees buy less insurance than their credit allocation would allow. The credit structure by age and pay is also relatively uncommon among employers and it makes the current program very complex and costly to administer. Most employers surveyed fund a basic level of life insurance that is the same multiple of pay for all employees. The most widely-used life insurance benefits design is for an employer to pay for life insurance equal to one times benefits base salary, although there were some universities in the survey that provided lesser amounts. As is the situation at Penn, most employers surveyed also allow employees to purchase additional coverage at their own cost frequently up to a financial limit much higher than the maximum level of coverage at Penn, \$300,000.

The Committee examined all of these issues as it developed the recommendations below to move to a life insurance benefit of one-times benefits base salary, and an increase in the amount of coverage employees may purchase for themselves.

Tax Issues

The current Penn plan offers life insurance in a tax inefficient manner. IRS rules require that taxes be paid by employees on the "imputed income" value of life insurance coverage exceeding \$50,000. "Imputed income" cost for life insurance in the tax tables required by the IRS far exceeds the

actual cost of insurance coverage for Penn employees. In other words, while the current Penn plan appears to offer life insurance on a pre-tax basis, tax rules in fact make the plan more costly to employees than an after-tax plan. Moving to an after-tax basis can generate significant tax savings to employees (about \$300,000 per year across Penn as a whole, through a reduction in unnecessary imputed income). Indications are that Penn employees find the current tax treatment confusing and it is also difficult for the University to administer. The recommended tax treatment changes below are designed to simplify the administration of the program while making it more understandable to employees. They are also designed to save employees money.

Flexible Credits

Pennflex dollars currently cost the University \$2.5 million plus the additional costs of administering and communicating this complex system. The Pennflex program at Penn was introduced about ten years ago. The program was designed as a first step toward an overall flexible credit design for benefits. However, there was no further movement toward a total flexible credit program. Some universities and local employers provide flexible credit systems, but none do so for a single benefit. Because of the difficulty and costs associated with communicating and administering the Pennflex system, the Committee recommends that it be discontinued. To the extent that Penn employees still value the credits it is undoubtedly because they can choose to use them for benefits other than life insurance or as cash. Thus, the Committee has recommended a strategy that would return to employees their lost Pennflex dollars in the form of an increase in benefits base salary which provides the ultimate flexibility for the use of those dollars.

The Committee evaluated the impact of the life insurance program changes on a set of typical employees. When considering the impact from the reduction of flex credits, the compensating base pay adjustment, and employee tax savings, it was found that the typical employee would gain financially in the short term and over time. In the few instances where employees were projected to be disadvantaged under the proposed program, their financial loss would be very small either in dollar amount or as a percentage of pay.

C. Recommendations

- Automatically provide all employees with noncontributory life insurance coverage of one times benefits base pay, up to a current plan maximum of \$300,000.
- Increase benefits base pay to compensate employees for the reduction in credits from changing to the new plan. The amount of the adjustment would be determined as the difference between the flex credit amount that would have applied effective July 1, 1997 under the current plan, and the cost of the new plan's employer-provided benefits of one times pay.
- Allow employees to purchase life insurance in excess of the non-contributory basic benefit provided by the University up to an additional four times pay to a maximum of \$750,000 of combined basic and optional coverage. This additional insurance would be acquired at a rate of one-times pay over the prior year's election at each enrollment period. For amounts in excess of \$500,000 individuals would be asked to provide evidence of insurability.
- Offer employee purchased life insurance on an after-tax basis in order to reduce unnecessary taxation on "imputed income" and save money for employees. Employees should still be able to direct a portion of pay into the pretax spending accounts and pay for health insurance premiums on a pretax basis.
- Eliminate the current flexible credit arrangement.

* Note: For faculty members, the benefits base is the academic base plus any salary for a full-year administrative appointment. For staff members, the benefits base is the annual base salary, excluding overtime, shift differentials, etc.

V. Paid Time Off

A. Review of the Current Plan

Penn has a number of categories against which paid time off currently can be charged. These include vacation days, personal days, holidays, a floating day, "special winter vacation" days, and in many although not all units "summer hours"—a reduced summertime workweek, for which paid compensatory days may be taken in the fall if the summer hours are not used. The paid time off accrual schedule for A1s and A3s and the total number of paid time off days is indicated below:

Current Accrual Schedule

	1 yr	2yr	3yr	5yr	Hol	Pers	Float	Sum	Wint	Total @5yrs
A1	<22	22	22	22	7	0	1	3	4-5	37-38
A3	<10	15	20	20	7	3	1	3	4-5	38-39

A1s have a total of 22 vacation days upon employment (pro-rated during the first year based upon a July 1 starting date), A3s accrue up to a total of 20 vacation days within three years. Upon employment, all staff have seven holidays and one "floating" day which replaced the Good Friday holiday some years ago. A3s receive three personal days per year as additional paid time off.

Upon employment, all staff are also given four to five special winter vacation days. The weekdays between the Christmas Day and New Year's Day holidays are designated as special winter vacation days. These days are additional paid time off and are not charged against vacation balances.

In addition, some but not all units at Penn alter their schedule of weekly hours worked for July and August. "Summer hours" in some segments of the University are 9:00 a.m. to 4:30 p.m. Monday through Friday with a one-hour lunch period. This results in a work week reduction from 35 to 32.5 hours with no reduction in pay. As an alternative to working 32.5 hours in the summer, an employee in units following this practice receives three compensatory days off*, which can be used during the fall.

B. Background and Issues

Examination of the practices of local for-profit companies and not-for-profit institutions confirmed that the number of paid time off days for staff at the University is significantly higher than the norm. The number of paid time off days at Penn is about 13 or 14 days higher than local for-profit employers. There is no doubt, however, that the number of paid time off days is a benefit that is valued by employees.

In general, Penn employees also accrue vacation time faster than average in comparison to both for-profit and not-for-profit employers. Most employers typically accrue paid time off based on length of service—as is the case with Penn non-exempt staff—but Penn exempt staff receive 22 days after the first year. This accelerated accrual rate clearly runs counter to the principle of staying close to competitive norms. Paid

time off for hourly employees, offered by employers surveyed, is presented below.

Accrual Rates for Employers Surveyed (Profit v. Not-for-Profit)

	1 Y	2Y	3Y	5Y	Hol	Pers	Float	Sum	Wint	Total @5yrs
P	<10	10.7	10.7	14	9	2.1	0	0	0	25.1
NP	<16.8	19	20	22.8	8.6	3.4	0	0	0.1	34.9

Penn's practice of offering a seasonal variation of paid time off—"summer hours"—is not a feature offered by any of the other employers surveyed. This policy of reducing employee hours during the summer without reducing pay was created decades ago, in the days that preceded the advent of air-conditioned offices and classrooms. It also preceded the rapid growth in research and summer classes, both of which create the need for staff throughout the calendar year. It has thus become an antiquated and inefficient policy. Moreover, in recent years, the practice has been unevenly administered across the University. As is noted above, there are a growing number of units and schools that do not provide summer hours or compensatory time for them, resulting in inequities among employees. Along with the many categories against which paid time off can be charged, the practice of providing summer hours also has contributed to the costly administrative complexity of accounting for employee time off.

Finally, the survey data revealed that most local employers allow staff to use accrued time after an introductory period (typically three-six months). Penn, however, does not allow use of vacation time for up to one fiscal year. The Committee believed that this practice of allowing no vacation time for a full year was not in the best interest of either the employees or the University.

C. Recommendations

- Maintain the current winter vacation without requiring employees to make use of paid time off.
- Eliminate the reduced summer hours and the compensatory days off associated with them.
- Reduce the number of categories for paid time off by combining personal and floating days into a single "paid time off" accrual to simplify time-off accounting. Current staff would be credited with the same number of vacation, personal and floating days using the existing accrual schedule.
- Adopt a single accrual schedule for new staff (A1s and A3s), hired after July 1, 1997, based on length of service, to provide for a total of 24 days paid time off, an additional seven holidays, plus the special winter vacation. The accrual schedule would be as follows:

Recommended Accrual Schedule: A1 and A-3

1 yr	2yr	3yr	5yr	5+yr	Hol	Pers	Float	Sum	Wint	Total @5yrs
<15	17	19	21	24	7	0	0	0	4-5	35-36

- Allow current staff to receive the better of the new or existing paid-time-off accrual schedules. This would result in an additional paid day off for A1 employees with more than 5 years of service.
- Allow newly-hired staff to request accrued paid time off after the 120-day introductory period.

* Note: Ungraded staff, Human Resources, clinical areas of UPHS, Dental School and Veterinary Medicine typically do not choose to observe summer hours. According to present policy, other schools/centers also may opt to be excluded from observation of summer hours reductions.

VI. Benefits to Regular Part-Time Employees

A. Current Benefits

Penn currently provides to part-time employees the benefits shown in Figure 1, opposite page.

B. Background and Issues

Penn has over 700 regular part-time employees, 500 of whom have faculty titles while the rest have staff titles. One-hundred-forty part-time employees participate in the health care plan, while 50 are in the life

insurance program. Some employees have requested that Penn consider expanding the current benefits package to include pro-rata sharing of health care premiums, University contributions to the tax-deferred annuity plan, a long-term disability plan, and tuition benefits.

The Committee reviewed surveys of several area employers with which Penn competes, surveys of certain peer universities, and a nationwide survey of practices of about 500 employers. These surveys showed that benefits programs offered to part-time employees vary widely. Some

offer no benefits while others offer the same benefits that are provided to full-time employees. The Committee concluded that Penn's benefits for regular part-time employees are generally competitive with those of other area employers.

The Committee also analyzed the cost of enriching the current benefits package in accordance with requests that have previously been received, as well as its effect on the employee benefits fringe rate. At previous meetings of the Personnel Benefits Committee where the subject was discussed, the Committee recommended reviewing the part-time benefits package "within the context of the overall design of the University's benefits package rather than as an addition to the current package." This Committee also recommended that any proposals to improve the benefits be on a cost-neutral basis. An analysis of the requested additions to the current program showed that Penn would have to incur substantial costs to include them.

C. Recommendations

- Maintain the current benefits package for regular part-time employees.
- Expand benefits to include the option of participation in the Health Care Pre-Tax Account with a maximum of \$1,000 and an eligibility requirement of two years of continuous service.

Figure 1: Current Benefits for Regular Part-Time Employees

1. Statutory Benefits		Cost to Penn
a. Social Security & Medicare		7.65% of salary
b. State Unemployment		0.30%
c. Workers Compensation		1.00%
	Total	8.95% of salary
2. Non-statutory Benefits		Cost
	To Employee	To Penn
a. Health care Plan	Active employee's contribution plus Penn's contribution	Because Plan is self-insured, cost to Penn equals actual claims reimbursed
b. Life Insurance (2x annual sal. available)	Group rate negotiated by Penn with insurer	Cost to Penn is a function of claims filed
c. Defined Benefit Retirement Plan*	None	Approximately 3.5% of salary
d. Tax-Deferred Annuity Plan	Voluntary contributions only	None
e. Pre-Tax Dependent Care	Contributions up to \$5,000	None
f. Vacation and Sick Days (pro-rated according to schedule worked)	None	Applicable Salary
g. Holidays (paid pro-rata for days falling on scheduled work day)	None	Applicable Salary

* Employee must work at least 1000 hours per plan year.

VII. Retirement Benefits

A. Current Retirement Benefits at Penn

Penn sponsors the Tax-Deferred Annuity (TDA) plan for faculty members and exempt employees. In order to receive a contribution from the University, employees must contribute to the plan. The schedule of required employee and University contributions is shown below.

Employee Age	Employee Contribution Required	University Contribution
under 30	4% of pay	6% of pay
30-39	5% of pay	8% of pay
40 & Over	5% of pay	9% of pay

University contributions are vested immediately. In other words, these contributions are non-forfeitable if an employee terminates employment. Employees have a choice of investment options for both their own contributions and for University contributions.

Penn also sponsors a defined benefits plan, the Retirement Allowance Plan (RAP), for nonexempt (A3) employees. No employee contributions are required. Upon retirement at age 65, this plan provides an annual benefit equal to 1.25% of final five year average pay multiplied by years of credited service. Reduced benefits are available from age 55 with at least five years of service (benefits are reduced since they are paid over a longer period of time). Benefits are vested, i.e., non-forfeitable on termination, after five years of service.

Penn also sponsors a supplemental TDA plan for all employees that allows additional savings for retirement on a tax preferred basis. In addition, Penn contributes to employees' Social Security benefits.

B. IRS Nondiscrimination Requirements

Retirement programs such as those at Penn must meet certain IRS requirements. Originally, these requirements were to be met by July 1, 1997, or employees would be taxed on the University contributions made on their behalf by the University. The new deadline for compliance announced by the IRS is July 1, 1998.

The IRS requirement for non-discrimination provides that retirement plans cannot discriminate in favor of highly compensated employees (defined for IRS purposes as an employee earning at least \$80,000 in 1997). These rules generally must be met by reference to the entire University controlled group. The University controlled group includes UPHS (the Hospital, Presbyterian Hospital, Clinical Care Associates and any other hospitals which the Health System acquires). However, if certain IRS tests using all employees in the controlled group are met, the non-discrimination requirements can be tested by only looking only at the University's non-health system plans. If the UPHS continues to change as it has in the past year, the controlled group testing accomplished in 1996 will need to be monitored again prior to the 1998 deadline. Thus, what appear to be appropriate solutions at this time may not meet the IRS requirements in 1998.

C. Recommendations

- Make no changes in either the TDA plan or RAP for FY 98, since the IRS has extended compliance deadline to July 1, 1998. Along with the overall review of retirement benefits, the nondiscrimination tests will be conducted next year with updated employee data to see what plan changes, if any, will be necessary for compliance.

VIII. Disability

A. Current Coverage

The University has a Long-Term Disability (LTD) insurance plan to provide faculty and staff who become totally disabled with income after benefits from available sick pay, personal days, vacation and extended sick leave end. "Total disability" is defined as the inability to perform duties in "any occupation" as confirmed by Penn's Disability Board. The LTD plan assures that total disability income from all sources will equal 60% of base salary up to a maximum benefit of \$5,000 per month. It is designed to work with other sources of income to replace 60% of salary

while disabled. Other sources of income include social security; workers compensation; other government disability, retirement or unemployment plans; any settlement or damage award received from the University related to the disability; 50% of income from part-time or rehabilitative employment and income from any other employer. A3s and A1s grade PA8 and below must complete a three-year service requirement to be eligible to receive this benefit. The plan is fully paid for by the University and thus income taxes are withheld from disability benefits payments.

LTD benefits may be received after Penn's Disability Board has

determined that the criteria for disability have been met; after all sick pay, personal days, vacation and extended sick leave allowances have been used ; and after the disability has been continuous and total for six months.

B. Recommendations

- The LTD plan is complex and has not been reviewed in several years. As is indicated above the plan includes elements of sick time, personal days, short term disability, vacation, workers compensation

and LTD. In addition, the plan design must comply with federal laws including the “Family and Medical Leave Act”. Given time and resource constraints, a comprehensive review of the disability plan was not undertaken as part of the redesign project.

- The Committee recommends that the plan be reviewed in 1997 taking into consideration the integration of the disability plan with other Penn and external benefits, tax implications and the adequacy of protection.

IX. Summary

It is the consensus of the Committee that the benefits package proposed above provides employees with a program that exceeds competitive standards and fully satisfies the principles that guided the redesign of benefits at the University. It recommends that, in the future, the benefits

package in its entirety should be reviewed annually. This review should occur in the context of the principles described above to ensure that the University’s benefits offerings continue to meet the goals of the University and its employees.

Appendices

A. Choice: Understanding the Health Care Delivery Vehicles

Definitions

There are several types of health care plans prevalent in the marketplace; these plans vary significantly in terms of benefit levels, overall flexibility (e.g., restrictions on provider access) and cost effectiveness. These plan types are described below:

- **Traditional indemnity.** These plans reimburse for all eligible expenses without application of discounts or participating provider features. Reimbursement is typically 80% after a deductible.
- **Discounted indemnity.** Programs like the University’s current Plan 100 and Comprehensive options are considered discounted indemnity plans because BC/BS has negotiated reduced fees with participating medical providers.
- **Preferred Provider Organization (PPO).** Plans such as the University’s PENN Care option offer members a choice of receiving medical care:
 - From within a network of preferred providers (like the UPHS doctors and hospitals in the PENN Care program) at higher benefit levels (e.g., 100% after a copay).
 - From any other doctors and hospitals, at lower benefit levels (e.g., 80% after a deductible).

In a PPO, members are not required to select a primary care physician who will be responsible for providing care or coordinating care with other network providers. Members may see any network provider, without a referral, at the preferred benefit level.

- **Health Maintenance Organization (HMO).** An HMO is a health plan that develops a network of doctors, hospitals and other providers who are responsible for providing all the health care services needed by the HMO’s enrollees. Members must select a primary care physician and need to obtain referrals in order to visit network specialists. No coverage is provided for medical services obtained from nonparticipating providers. While some HMOs employ their own doctors, most contract with “private practice” physicians and community hospitals who continue to see patients from other health plans.
- **Point-of-Service (POS).** POS plans are a cross between an HMO and a traditional indemnity plan. Like a PPO, members can choose to receive care from within the network (in this case, the HMO network) at a higher benefit level, or they can go “out of network” (the indemnity option) and receive reimbursement at a lower benefit level. Like an HMO, members must select a primary care physician and need to obtain referrals in order to visit network specialists.

Key Plan Characteristics

Plan Feature	Traditional Indemnity	Discounted Indemnity	Preferred Provider Organization	Point-of-Service Plan	Health Maintenance Organization
Network of Providers with Negotiated Price Discounts	No	Yes	Yes	Yes	Yes
Access to Network Through Primary Care Physician	No	No	No	Yes	Yes
Local Clinical Oversight of Network Providers	No	No	No	Yes	Yes
Benefit for Use of Non-Network Provider	Full	Reduced (balance billing)	Reduced	Reduced	None

B. Key Features of Current Program

Benefits	Indemnity		PPO		HMOs		
	Plan 100	Comp	PENN Care		KHPE	USHS	QualMed
<i>Plan type</i>	<i>Indemnity</i>	<i>Indemnity</i>	<i>In-Network</i>	<i>Out-of-Network</i>	<i>HMO</i>	<i>HMO</i>	<i>HMO</i>
Deductible							
Amount	\$200	\$200	\$0	\$200	\$0	\$0	\$0
Application	MM ⁽¹⁾	All charges	N/A	Out-of-network charges	N/A	N/A	N/A
Coinsurance	100%/80% ⁽²⁾	80%	100%	80%	100%	100%	100%
Max. out-of-pocket	\$2,200	\$1,200	N/A	\$1,200	N/A	N/A	N/A
Office visit	Ded & coins	Ded & coins	\$10	Ded & coins	\$5	\$5	\$5
Pharmacy	80%	80%	80%	Reduced		No coverage	No coverage
80% (\$50 ded)							
Monthly contributions							
Single	\$61	\$0		\$0	\$0	\$0	\$0
Family	\$167	\$0		\$0	\$0	\$0	\$8

(1) Deductible applies to Major Medical (MM) charges only

(2) 100% coinsurance for hospital and medical/surgical; 80% coinsurance for Major Medical

C. Historical Monthly Employee Contribution Summary—Medical Options

	87/88	88/89	89/90	90/91	91/92	92/93	93/94	94/95	95/96	96/97
Plan 100										
Single	\$18	\$20	\$27	\$38	\$44	\$48	\$54	\$58	\$58	\$61
Family	62	72	86	105	119	133	147	159	159	167
PENN Care										
Single	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	(6)	0
Family	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	(6)	0
Comp										
Single	6	5	7	1	1	1	1	1	(6)	0
Family	27	30	40	15	11	11	12	12	(6)	0
QualMed										
Single	9	7	1	1	1	5	5	11	6	0
Family	23	24	25	23	36	51	55	56	45	8
USHC										
Single	13	17	14	17	14	18	11	5	(3)	0
Family	35	51	61	68	48	56	37	21	2	0
Keystone*										
Single	15	16	19	4	13	19	9	4	(10)	0
Family	44	47	50	30	29	49	32	19	(10)	0

* Delaware Valley HMO before 90/91.

D. Key Features of Recommended Program

Indemnity		POS		PPO		HMOs	
Benefits	Plan 100	KHPE		PENN Care		KHPE	USHC
<i>Plan type</i>	<i>Indemnity</i>	<i>In-Network</i>	<i>Out-of-Network</i>	<i>In-Network</i>	<i>Out-of-Network</i>	<i>HMO</i>	<i>HMO</i>
Deductible:							
Amount	\$200	\$0/\$120 ⁽³⁾	\$200	\$0	\$200	\$0	\$0
Application	MM ⁽¹⁾	N/A	Out-of-network	N/A	Out-of-network	N/A	N/A
		charges		charges			
Coinsurance	100%/80% ⁽²⁾	100%	80%	100%	80%	100%	100%
Max. out of pocket	\$2,200	N/A	\$1,200	N/A	\$1,200	N/A	N/A
Office visit	Ded & coins	\$10/\$15 ⁽⁴⁾	Ded & coins	\$10	Ded & coins	\$5/\$10 ⁽⁵⁾	\$5/\$10 ⁽⁵⁾
Pharmacy	80%	80%	Reduced	80%	Reduced	80%	80%
Monthly contributions							
Single	\$66		\$20		\$40	\$10	\$10
Family	\$172		\$52		\$104	\$26	\$26

(1) Deductible applies to Major Medical (MM) charges only

(2) 100% coinsurance for hospital and medical/surgical; 80% coinsurance for Major Medical

(3) No copay applies when using UPHS; \$120 copay applies per inpatient admission for non-UPHS facilities

(4) \$10 copay applies when using UPHS providers

(5) \$5 copay applies when using UPHS providers

**Benefits Programs
of the University of Pennsylvania:
Review and Recommendations**

Comment on this report can be sent to the
Benefits Advisory Committee
by email to benefits@pobox,
or by campus mail
to the co-chairs of the Committee,
whose names are given on page S-1.