Initial guidance on changes in CGE hourly appointments

March 13, 2017

Guidance on Graduate Assistant Appointments under new CGE contract

The new CGE contract has changed the use of hourly appointments for graduate assistants. The principal reason for this change is that graduate assistants receive specific benefits under the contract (summer tuition, family leave, health insurance, etc.) that are not available to hourly appointees. As the contract has evolved and these benefits have accrued it has become too complex to create “one-off” solutions for hourly appointments that are intended to substitute for graduate assistant appointments.

At the same time, there are many circumstances where units have supported graduate students on funds that do not support tuition, or stipends, or both, or there are other unusual arrangements for support. The intent of the contract change is not to eliminate the use of those funds and the support of those students, but to appoint students to the appropriate types of positions so they receive the benefits to which they are entitled.

This document provides initial guidance on how to make appointments for some of the more common circumstances that have been discussed with the Budget Office or Human Resources. As the campus implements this change the specific procedures in each case may need to be updated as everyone better understands the issues. There will also certainly be cases not covered by these examples. When either circumstances comes up, please contact the Budget Office (Sherman.Bloomer@oregonstate.edu) or Human Resources (Viki.Dimick@oregonstate.edu) and we can work with units to find an appropriate solution.

Best regards,

Sherm Bloomer     Viki Dimick
Director, Budget and Fiscal Planning  Employee and Labor Relations Manager


“Effective September 2017: Employing units shall use Graduate Employee appointments rather than hourly positions except where the work is temporary or is unrelated to academic work normally performed by Graduate Employees.”

Note that there are circumstances where hourly positions are appropriate. A chemistry Ph.D. student working in a kitchen for Housing and Dining could be appointed hourly. Students who are substituting for another graduate assistant on sick leave for a few hours, staffing a department field trip or open house over a weekend, or providing grading for a single large exam (all cases in which the work is temporary and significantly less than a full term) can be appointed hourly. This requirement also applies to the three quarter academic year. Hourly appointments in summer term may still be used. Note that hourly pay varies by the type of job, not by the type of student (so the hourly rate for washing dishes is the same for an undergraduate student and a graduate student).

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Examples of process to appoint students as graduate assistants when they have formerly been paid on hourly appointments:

Grant provides a stipend but not tuition and fees, department was using Laurels Funds to provide a tuition and fee waiver making an hourly appointment:

In this case, the student would be appointed as a Graduate Assistant on the grant. When payroll is processed, the cost of benefits (tuition, fees, and health insurance) would be redirected to the departmental cost share index. The Laurels Funding previously provided as a waiver of tuition would be budgeted to the Department as a remission to cover the costs of the charges to the cost share index. The net cost to the Department is about the same as in the hourly case (depending on how the unit was funding the cost of health benefits, if they were).

Note that some Laurels funding will still be available as tuition waivers, which can be used as a scholarship without any stipend attached. This might be used to help a student in the last term of a graduate program, without appointing them as a graduate assistant. The Graduate School is working with units to identify the appropriate mix of Laurels funds to be allocated to tuition and fee remissions vs. those allocated as waivers. The appropriate level of Laurels remission funding to support a graduate assistant is also being reviewed.

Grant provides a stipend but not tuition, department was using department funds to provide tuition remission or pay equivalent to tuition

In this case, the student would be appointed as a Graduate Assistant on the grant. When payroll is processed, the cost of tuition and fees (health insurance and other OPE is charged to the grant as part of payroll) would be redirected to the departmental cost share index. The Department would absorb that cost in the existing budget (as they had been absorbing the cost on department funds before).

Agency provides a fellowship for tuition but does not support a stipend (or provides a stipend not equivalent to that of a graduate assistant)

If an agency provides a tuition benefit, but not a stipend (or provides only a small stipend) these awards are most commonly fellowships and these students should not be assigned work as graduate assistants. In most cases the sponsoring agency assumes that the student is being supported to pursue their studies, not to work for the university. In this case, the student would be given a scholarship from the award and the Department would award a scholarship equivalent to funding that would previously have been provided as hourly pay (note that while E&G funds could not be used for scholarships when OSU was part of the State system, it is now allowable to fund scholarships with E&G dollars with approval of the unit head and the Provost---a policy is being developed for this). The difference is that there would not be an expectation of a work assignment outside of the expectation of research and(or) scholarship required by the award. Several examples of this include awards from NASA, EPA, and student supported by the GI Bill.

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The appointment is split between a partial teaching assistantship (paid by the Department) and a grant that only allows a stipend

Appointments that are split between fund sources have to proportionally share the tuition and benefit cost as well as the stipend cost. In this case if the student were on a 0.40 FTE appointment, half from each fund source, they would be appointed as a graduate assistant at 0.40 FTE with the funding sources identified as 0.20 Department (for half the stipend, tuition, fees, and other benefits) and 0.20 on the grant, in which case the tuition, fees, and other benefits costs would go on the Department cost share index. These could be funded by whatever source had previously been providing the remission (Department funds, Department remission budget, or Laurels funds converted to remissions).

The appointment is split between two grants, one that allows payment of full tuition and one that allows only a stipend.

There are cases where units have split an assistant appointment between two grants, with one grant paying part of a stipend (say 0.20 FTE) and tuition and fees, and the other grant providing only a stipend (say at 0.29 for a full appointment of 0.49).

In this one grant would be charged the proportional amount of stipend, tuition and fees, and benefits, while the other grant would be charged the stipend and benefits and tuition and fees would be charged to the department cost share index.

Appointments that are split between fund sources have to proportionally share the tuition and benefit cost as well as the stipend cost, as noted above. This is because the cost of employing a graduate assistant is the stipend plus the benefits (including tuition, fees, insurance) and those costs should be fully attributed to the fund source benefiting from the work of the assistant. It is the same as the benefits for a faculty member being split proportionately with the source of the pay.

One of the principal reasons for this is that many granting agencies expect that charges to the grant for work are consistent across the institution and appropriate for the work performed. NIH’s guidelines for charging tuition remission, for example, include language that says “Tuition remission and other support are …. consistently provided in a like manner to students in return for similar activities conducted under Federal awards as well as other activities [and] The tuition or other payments are reasonable compensation for the work performed and are conditioned explicitly upon the performance of necessary work.” In general, this is most appropriately accomplished by consistently assigning benefits costs with payroll costs.

As we see how many of these circumstances there are and to what degree they impact the ability to support students in certain units, the Budget Office will talk with Deans and the Provost about possible budget solutions.

The funding agency (this occurs with some grants from State of Oregon agencies) provide some funds to support a stipend or hourly work for graduate students to participate in studies or work of limited duration but do not provide funds for tuition or benefits.

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This is a case where hourly appointments may be appropriate. If the work is limited in duration or episodic (a couple weeks one term, a couple the next) and the total funding available would be significantly less than a 0.30 FTE appointment for a given quarter, hourly work is appropriate as it is functionally “temporary”.

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