WORKSHEET INSTRUCTIONS FOR FACULTY UNION SALARY INCREASES
FY 2019-20

The information and instructions below are provided to assist you in completing the worksheet process. If you have questions, please do not hesitate to contact your Human Resources contacts or the Human Resources individuals listed at the end of this document.

Before proceeding, we ask that you review the June 13, 2020 memo from Susan Capalbo, Senior Vice Provost for Faculty Affairs, and Cathy Hasenpflug, Chief Human Resources Officer, Office of Human Resources (OHR). It contains important information that will assist you in completing this process successfully. The memo can be found on the Office of Human Resources website at http://hr.oregonstate.edu/.

Eligibility: The worksheets should reflect all faculty union employees in the Timesheet (TS) Org hired into their current position prior to June 16, 2019 as of June 10, 2020.

Review the worksheets to ensure that all eligible faculty union members employed in the designated TS Org have been included and the listed information is correct. If you have questions, please see your Human Resources contact. The attached worksheet(s) reflect employee salary data as of June 10, 2020.

Funding: The funding for the increases, reflected on the attached worksheet(s), will be provided by central administration for eligible positions supported by Education and General (E&G) funds.

It is the responsibility of the recommending department/unit to identify and cover funding for positions supported by Statewide Public Services (SWPS), grants, contracts, gifts, auxiliary revenue and other funds from existing budget.

Completing the Worksheet

Completed By: At the top left-hand corner of the worksheet; please enter the name of the individual completing the worksheet and his/her extension number.

Column K – Annual Full-time Salary Rate as of June 10, 2020: Review data in Column K to ensure it reflects the employee’s current annualized salary rate. The annualized salary rate represents the employee’s salary rate on a full-time (1.0 FTE) basis. If the employee is appointed at less than 1.0 FTE, the merit increase he/she receives will automatically be pro-rated in Banner based on their current FTE. If you believe the salary information listed for an employee is incorrect, you may correct the worksheet by inputting the correct amount in Column K.

Column L – Performance Expectations Met?: Employees are eligible if they met expectations in their last PROF or merit review. An eligible employee who complied with the written requirements for the merit review process of their employing unit will not be denied eligibility for a merit increase because the Employer did not complete the merit review or PROF process.

Column M – No Increase Reason Code – Data Entry Options: You must place one of the following codes in Column M if you are not recommending a merit increase for an employee.

Code A – Employee will not receive a Merit increase
Code B – Employee has or will be terminating/retiring prior to the effective date of the salary increase
Code C – Employee is located in another department/unit
Code D – Funding source does not provide for an increase
Code E – Employee received Fully Satisfactory increase Jan/Feb
**Column N – Proposed Merit Percentage Increase:** Insert the desired merit increase between a minimum of 1.8% and a maximum of 6%.

**Column O – Raw Annualized Dollar Amount of Merit Increase:** Column N automatically calculates the annual dollar amount of the increase based on the percentage input in column N. Please remember that this is an annualized amount based on 1.0 FTE. Banner will pro-rate this amount if the employee’s appointment is less than 1.0 FTE.

**Columns P – Total Percent Increase, Adjusted to be Divisible by 9 or 12 Months:** Column P takes the value of Column N and adjusts it to produce a total percentage increase that creates a dollar amount that is divisible by 9 or 12 months, based on the employee’s appointment basis (Column J).

**Column Q – Estimated Annualized Dollar Amount of Total Increase, Adjusted to be Divisible by 9 or 12 Months:** Column Q reflects the amount in Column O, adjusted to be divisible by 9 or 12 months (Column J). This is an estimated amount and may differ slightly from the final amount reflected in the employee’s paycheck due to rounding for Banner requirements. In most instances, there is no difference between this amount and the amount reflected in the paycheck.

**Column R – Estimated Annual Salary Rate in Jan/Feb, Rounded up and Divisible by 9 or 12 Months:** Column R is the result of adding Column Q to Column K to reflect the employee’s new annualized salary rate, effective either January 1, 2020 (for 12-month employees), or February 1, 2020 (for 9-month employees).

**Column S – Department Remarks:** Please use this column to indicate terminations, tenured placeholder positions (enter “TP” only), and other information useful in defining any conditions that affect your decision.

**Columns T and U - Department Use Only:** The Department Use Only section (Columns T and U) have been added to the worksheets at the request of several key representatives as a tool to assist in budgeting and ensuring fiscal controls. Please be aware that these columns do not have an impact on other worksheet calculations, nor will OHR or Payroll utilize this information in administering the faculty salary increases for FY 2019-20. You may elect to use or not use this section of the worksheet.

Columns T and U include an employee’s current appointment FTE (%) as of June 10, 2020 and calculates monthly actual gross salary rate based on appointment basis (9 or 12) and appointment percent. You may change these columns, though any changes will not be reflected in the columns to the left. Column U is based on Column R. If you change the appointment percent (Column T), the monthly actual (Column U) will recalculate, based on the annualized salary rate in Column R.

**Increase Summary Section:** At the bottom (or on the last page) of the worksheet, you will find a summary section. This is a tool to assist you in determining the total dollar amount for distribution.

- **#1 - Total Base Salary Amount for Eligible Employees:** This amount is the total of Column K (Annual Full-Time Salary Rate as of 06/10/20). It is adjusted automatically based on entries in Column M (No Increase Codes C, D, and E). The total annual salary base excludes Sabbaticals and Tenured Appointment Placeholder positions.
- **#2 - 3% Annual Salary Available within the Salary Increase Pool:** This cell calculates the 3% available for the awarding of salary increases. Changes in #1 – Total Annual Salary Base amount will automatically be accounted for in this cell.
- **#3 - Sum of Proposed Increases in Column Q:** The sum of the salary increases from column Q (excludes placeholders coded “TP” entered into S-Department Remarks)
• #4 - Amount Over/Under Distributed: Shows the dollars remaining to distribute and/or dollars over distributed
• #5 - Percent Distributed Above: Percent distributed (target equals 3%)

Additional Information

Employees No Longer in Your Unit: You may have employees listed on your worksheet who are no longer in your department/unit or who are currently in another unit. If so, please enter one of the following codes for these employees:

• Terminated/retired and ineligible: Enter Code “B” in Column M (No Increase Code) and indicate date of termination or retirement in Column S (Department Remarks).
• Faculty member left your department and is employed elsewhere at the University: Enter Code “C” in Column M and the employee’s current Time Sheet Org in Column S (Department Remarks).

Sabbaticals: Employees currently on sabbatical leave are listed in their regular, non-sabbatical position. Their sabbatical position is not on the worksheet. Complete the appropriate increase information for the listed regular, non-sabbatical position. OHR will prepare a separate spreadsheet for Payroll’s use to apply the increase to both the regular and sabbatical positions if applicable.

Tenured Faculty Holding Administrative Positions: Tenured faculty holding administrative positions are listed in their placeholder position.
• OHR will identify tenured placeholder positions by adding “TP” in Column S-Department Remarks in the placeholder’s department/unit’s worksheet.
• If you need information regarding tenured appointment placeholder positions in your department, contact your Human Resources contact or Edith Birky at 7-0736 or edith.birky@oregonstate.edu.

Adding employees: Five (5) additional blank rows are provided at the bottom of each worksheet to add employees if the employee meets the eligibility criteria as required. Reasons to add employees include employees who in their current position have recently transferred to your unit from elsewhere in the university, and employees who are missing from the worksheet without an apparent reason. If you do not have a sufficient number of blank rows on your worksheet, please contact Edith Birky at 7-0736 edith.birky@oregonstate.edu.

Stipends: Stipends for Faculty Excellence, Distinguished Professor, and other awards are not eligible for increases and, therefore, are not included on the worksheets. For other types of stipends, refer to the employee’s stipend conditions outlined in his/her personnel documents to determine if an increase is appropriate.

Effective Dates: The Banner entry for will have a Banner Effective Date of the July 1, 2020, and a Banner Personnel Date of the 1st of the month in which the increase is to be effective (January 1, 2020 for 12-month employees or February 1, 2020 for 9-month employees).

Important Dates:

• June 22 – Completed salary worksheet recommendations due to your HR contacts, both the electronic MS Excel file and a signed paper copy with appropriate signatures as indicated on the worksheet.
• June 30 – OHR begins reporting to department/unit key representatives the approval of increase recommendations. Upon receiving notification, departments/units may begin informing employees who are receiving increases. Departments/units may not provide
information to employees until they have received approval from Faculty Affairs/OHR.

**QUESTIONS:**
Should you have questions about this process, please contact your Human Resources contact or:

Edith Birky, Academic HR Officer, Office of Human Resources at Edith.Birky@oregonstate.edu or 7-0736

Tracey Yee, Associate Director-Classification and Compensation, Office of Human Resources at tracey.yee@oregonstate.edu or 7-5426