



UNIVERSITY OF OREGON

October 30, 2013

TO: Deans
Vice President for Research
Vice President for Equity & Inclusion
Vice President for Student Affairs

CC: Sonia Potter, Mark Yuran

FROM: Scott Coltrane
Interim Senior Vice President and Provost

RE: Implementation of Retroactive FY13 and FY14 Salary Increases for
United Academics Bargaining Unit Members

This memorandum concerns the implementation of retroactive FY13 and FY14 salary increases based on the collective bargaining agreement with United Academics. It applies to **eligible Officers of Instruction (“OI”) and Officers of Research (“OR”) who are members of the United Academics bargaining unit. The list of eligible OIs and ORs is being provided under separate cover.**

The salary program includes:

1. FY13: 1.5% across-the-board increase, retroactive to January 1st, 2013
2. A one-time \$350 payment to 1.0 FTE faculty employed on the date the collective bargaining agreement was ratified (Oct. 9th, 2013)
3. FY14: 1.5% across-the-board increase and a merit increase pool equivalent to 2% of salary for eligible represented faculty, retroactive to July 1st, 2013

Because we have an interest in ensuring that FY13 and 14 raises are implemented as quickly as possible, there are some very tight timelines.

Guidance for FY13 1.5% Across-the-Board Process

The list of eligible faculty will be provided to you on October 30th. We will need you to review, confirm, and return this list to Sonia Potter by end-of-day on Friday, **November 1st**. We are targeting the November 30, 2013, pay check for this 1.5% across-the-board increase plus any back pay.

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Guidance for the One-Time \$350 Payment

The list of eligible faculty, including bargaining unit members and faculty excluded from the bargaining unit, will be provided to you on November 1st. Please review, confirm and return this list to Sonia Potter by Friday, **November 8th**. We are targeting the November 30, 2013 paycheck for the one-time payment of \$350, as well. Please note that the \$350 payment will be pro-rated for faculty working less than 1.0 FTE.

General Guidance for FY14 1.5% Across-the-Board and 2% Merit Process

We expect to have your list of eligible faculty available to you by November 22nd. Your proposal for the allocation of each 2% pool must be completed no later than **December 18th, 2013**. The goal is for the second (FY14) 1.5% across-the-board increase, merit, and any back pay to be included in the paycheck received on January 31, 2014.

Guidance for FY14 2% Merit Process

Later this year, all faculty in each department and unit will develop written policies setting criteria and procedures for FY15 and future merit increases. This process will be described in detail in later communications.

It is understood that we do not have sufficient time to follow the new process for this immediate round of merit increases. Therefore, for this current round, we will follow an abbreviated version of the process. Each department and unit must provide an opportunity for faculty to review and give input on the criteria you will use to determine merit increases. Because of the time pressure, this faculty feedback might most efficiently be obtained through a discussion in a faculty meeting. By no later than **November 27th**, each dean must provide documentation that this opportunity for input has occurred in each unit.

There are two, 2% merit pools for members of the bargaining unit: one for all eligible tenure-related faculty, and one for all eligible non-tenure-related faculty who are members of the United Academics bargaining unit.

There are two steps in the process for determining the allocation of each 2% pool: (1) a performance evaluation of each individual covered by each pool; and (2) allocation of each 2% pool among the eligible individuals whose performance warrants a merit increase.

The merit component of the program requires that each eligible employee be evaluated. This means that you must conduct a performance review of each eligible

Officer of Instruction and Research who is a United Academics bargaining unit member so that each may be considered for the salary program's merit component. This does not need to be a comprehensive review such as those done for faculty third-year or post-tenure reviews. It needs to be no more than typical annual performance review. **If you have already conducted a performance review in FY13, you do not need to conduct another one.**

In determining merit, you must rate each eligible employee as exceeding expectations, meeting expectations, or failing to meet expectations. We will expect to see a legitimate distribution of these ratings. In other words, we expect that most employees will be rated as meeting expectations. Only employees who meet or exceed expectations may receive a merit increase. If you have previously done your reviews without using these categories and cannot easily translate it into these categories, you will need to document your basis for the merit increases given. There should be a clearly delineated variation of merit increases directly related to the content of the performance reviews, and internal equity considerations must also be documented in arriving at the amount of the increase. The documentation is subject to a spot check.

You must provide the criteria for the allocation of the 2% pool among those who meet or exceed expectations to Doug Blandy, Senior Vice Provost for Academic Affairs, no later than **November 27th**.

Other Merit Guidance

Any proposed increase retroactive to July 1, 2013 that is above 10% (including across-the-board and merit components) must be supported with a brief narrative justification based on unit or division criteria. These increases will need to be approved by the Provost.

While some units may have additional resources, those funds may not be used to expand the program. Our goal is to have this program applied consistently across the university.