



UNIVERSITY OF OREGON

April 9, 2013

TO: Executive Leadership Team
Deans' Working Group

FROM: Jim Bean, Senior Vice President and Provost

RE: Merit component of salary program as applied to eligible
Officers of Instruction and Officers of Research who have been
excluded from the United Academics bargaining unit

This memorandum concerns the **merit** component of the recently announced salary program and applies to **eligible Officers of Instruction and Research who have been excluded from the United Academics bargaining unit. The list of eligible OIs and ORs is being provided under separate cover.** A separate memo will be sent regarding Officers of Administration.

As we have announced, the salary program includes in FY13 a 1.5% across-the-board increase for unrepresented faculty and in FY14 a 1.5% across-the-board increase and a merit/equity increase pool equivalent to 2% of salary for eligible faculty and staff. Internal salary equity may be factored into the amount of a merit increase but is not an independent basis for a salary increase. There are two 2-percent merit pools: one for all eligible Officers of Administration, and one for all eligible Officers of Instruction and Research who are excluded from the United Academics bargaining unit.

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

General Guidance

The merit component of the program requires that each eligible employee be evaluated in FY13. This means that you must conduct a performance review of each eligible Officer of Instruction and Research who is excluded from the United Academics bargaining unit during FY 13 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. They only need to be a typical annual performance review. If you have already conducted a performance review in FY13, you do not need to conduct another one.

You have considerable latitude to define the reviews. However, you must rate each eligible employee as exceeding expectations, meeting expectations, or failing to meet expectations.

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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-percent pool among those who meet or exceed expectations to Doug Blandy, Senior Vice Provost, Academic Affairs no later than April 19th, 2013. The performance evaluations, including the rating, must be completed no later than May 31, 2013. Your proposal for the allocation of each 2-percent pool must be completed no later than June 15, 2013. The goal is for the merit/equity and second 1.5% across-the-board increase to be included in the Fall 2013 pay (but retroactive to the start of the fiscal year appointment as appropriate). The first 1.5% across-the-board increase should be reflected in the May 2013 pay period but is retroactive to January 2013.

Other Guidance

Any proposed FY14 increase above 10 percent (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.

For additional information, please refer to my email of March 4th. Please let me know if you have any questions.