SUU Staff Association Minutes
April 12, 2010, 3:30 pm
Provost Office Conference Room

Present: Julie Larmore, Bruce Tebbs, Travis Rosenberg, Paula Mitchell, Mark Miller, Bryant Flake, James Loveland, Mike Humes, Lindsay Fullerton, & Bruce Barclay.

Excused: Mark Miller

Special Staff Equity Session

- Review of previous meetings/information concerning Staff Equity
  - Travis reviewed the process of how the benchmarks for each position are created. Detailed information was given on National CUPA as well the CUPA for Utah based on all of the public institutions in the state gathering and sharing information. Travis also explained the process of gathering current title and position responsibilities for all positions on campus that has been occurring over the past 14 years. It was noted that not all supervisors have submitted the most current information to the Human Resources Office. The committee also received an explanation on appropriated vs. non-appropriated positions and how the salary works for the two types of employees.
- Approach to Campus
  - The committee discussed how the word would be sent out to campus and the timelines for discussion. The timeline is as such:
    - **April 15th** - send a memo from the staff association to the President's Council to be presented by Dorian Page on behalf of the staff. The memo will detail the recommendations of how the Staff Association feels the equity dollars should be distributed.
    - **April 20th** – President's Council & Dean's Council (based on the Faculty Senate recommendations which are also going forward as a separate document from the faculty) will give feedback on the recommendations**,** giving justification/information on anything that are in question. Final guidelines will be determined by the end of the month by the President's Counsel.
    - **April 21st – May 5th** (approximate) – Executives will determine salary/contracts.
    - **May 6th – May 12th** (approximate) – HR prints all contracts for SUU employees.
    - **May 21st** – Faculty and Staff receive their contracts for the 10-11 Fiscal Year to sign and return.
- Editing of memo to be presented to the President's Council
  - The attached memo was presented to the Staff Association as a basis to begin the discussion. The following changes were made during the meeting:
    - Addition of a new #1 recommending that the equity dollars be divided between faculty needs and staff needs, with a greater proportion going to that employee class where the need is greatest.
    - Previous #1 changed to #2. Delete 'individuals and'. Change percentage to proportion.
    - Previous #2 changed to #3. Replace 'needing' with 'eligible for'. Delete 'equivalent of 1% or a flat amount'.
    - Previous #3 changed to #4. Replace 'Vice President's' with 'Executive'.

- Previous #4 deleted completely.
- #5 Replace ‘It is important’ with “Recognizing that there are other sources of funding for salary increased, we recommend’
- #6. Creation of a new #6 to discuss encourage departments with non-appropriated positions to follow the priority of bringing their positions closer to market in the same manner as appropriated positions, as funds permit and allow.
- #7 Creation of a new #7 giving executives limited discretion to make adjustments. It is expected rationale will be given in circumstances that do not follow the norm.
- #8 Creation of a new #8 recommending that no equity increase to any one person should be above 15% exclusive of the $300 in guideline #3.
- Previous #6 is now #9.
- Hypothetical equity memo remains unchanged.

Meeting adjourned at 5:21 pm.

****Following the meeting, the Executive Board was given 3 days to suggest updates and changes to the group concerning the memo. Those approved are attached in the final version (pages 5-6) of the memo that was sent to the President’s Council.**

SUU MEMORANDUM

To: Dorian Page, Vice President for Finance & Facilities
From: David McGuire, Director of Human Resources
Travis Rosenberg, Human Resources Generalist
Subject: Guidelines for Distributing Staff Equity

Date: March 12, 2010

To allow for consistency in distribution of current and future staff equity dollars, the following guidelines are proposed:

1. It is important that those individuals and departments with the greatest amount of equity need be given a greater percentage of equity dollars to use.
2. It is important that those positions needing equity that are below the salary threshold of $30,000 per year be allowed the possibility of an additional amount equivalent of 1% or a flat amount of $300 when distributing equity. This allows these already low-paid positions to reach market faster.
3. It is important that equity decisions be made at the Vice President's level for his or her area's needs based on these guidelines.
4. It is important that Vice Presidents be aware of current institutional decisions. These decisions relate to program development, etc. Such positions were made with a specific intent and therefore may be exempt from receiving equity dollars. If the decision is made to change current institutional decisions, it should come at the approval of SUU administration.
    a. It is possible, in the instance of current institutional decisions, to reallocate funds in order to give dollars to a position. The ultimate goal is to ensure the proper hiring of positions at market levels. As an example, should a department head not have the funds necessary to hire a position close to market and/or chooses to fill the position below market, that position may not entitled to equity dollars. Increases for the position should come through reallocation of funds from within the supervisor's discretion.
5. It is important that equity dollars are not given to any positions currently over 100% of market equity. These funds are to be used to bring current positions below market equity to a more equitable level and not used as a method of retention or merit.
6. The attached memo details a hypothetical equity scenario and how to distribute staff equity. This method of making equity adjustments allows more equity dollars be given to those positions furthest from their benchmark, while at the same time prevents "leapfrogging" of individuals. It is important that divergence from this scenario and guidelines be explained to determine if equity dollars are being used appropriately.

SUU MEMORANDUM

To: Dorian Page
From: David McGuire, Director of Human Resources
Travis Rosenberg, Human Resources Generalist
Subject: Hypothetical Equity Scenario for Staff Equity Distribution
Date: March 12, 2010

In making salary equity adjustments, the objective should be to bring underpaid staff members across campus up to an appropriate benchmark level. It is anticipated that as funds become available for salary equity adjustments, such funds may be insufficient to bring all underpaid staff members up to the target level. It is important that the available money should be distributed in a way that adds to all underpaid staff members and at the same time reduces internal inequities. A simple way to do this is illustrated below.

The following table shows a hypothetical situation in which there are ten staff members with varying salaries within a department, both in absolute terms and relative to their respective benchmarks. Currently, the department is at 91.35% of market equity and the total amount needed to bring each position to the applicable benchmark is $35,000. Suppose there is only $10,000 available for equity adjustments, plus funds for the additional $300 equity for employees below the benchmark that have a salary less than $30,000. The bottom two staff members, who are at or above the benchmark, get no salary adjustment. The others receive a percentage of the total available based on their share of the total gap. For example, the equity gap for the first staff member is 18.43% of the total gap (6,450/35,000). Two items should be noted: 1) those furthest below the benchmark get relatively larger adjustments so that external and internal inequities are reduced simultaneously and 2) the individuals who share the same benchmark (30,000 and 43,000) received equity in relation to their % of benchmark and as such, no leapfrogging has occurred for those individuals.

	Current Salary				*Equity Adjustment*			*New Salary*		
Benchmark Salary	**Current Salary**	**% of Benchmark**	**Equity Gap**	**Gap as % of Total**	**Amount**	**Add'l for low salary**	**% Increase**	**New Salary**	**% of Target**	**New Gap**
27,700	21,250	76.71%	6,450	18.43%	1,843	300	8.67%	23,393	84.45%	4,307
43,100	35,000	81.21%	8,100	23.14%	2,314	-	6.61%	37,314	86.58%	5,786
36,250	31,500	86.90%	4,750	13.57%	1,357	-	4.31%	32,857	90.64%	3,393
60,800	55,270	90.90%	5,530	15.80%	1,580	-	2.86%	56,850	93.50%	3,950
43,000	39,300	91.40%	3,700	10.57%	1,057	-	2.69%	40,357	93.85%	2,643
30,000	27,530	91.77%	2,470	7.06%	706	-	2.56%	28,236	94.12%	1,764
23,500	21,900	93.19%	1,600	4.57%	457	300	2.09%	22,657	96.41%	843
43,000	40,600	94.42%	2,400	6.86%	686	-	1.69%	41,286	96.01%	1,714
84,750	85,000	100.29%	-	-	-	-	-	85,000	100.29%	-
30,000	32,000	106.67%	-	-	-	-	-	32,000	106.67%	-
422,100	389,350	**91.35%**	35,000	100.00%	**10,000**	600		399,950	**94.25%**	24,400

SUU MEMORANDUM

To: President's Council
From: Staff Association Executive Board

Subject: Recommendations for Distributing Staff Equity

Date: April 15, 2010

Our committee has met and makes the following recommendations to the President's Council to allow for consistency in distribution of current and future staff equity dollars in this, *the first of a four-year plan*:

1. We recommend total available equity dollars be divided between faculty needs and staff needs, with the proportionate allocation going to each employee class.
2. We recommend departments with the greatest amount of staff equity need be given a greater proportion of staff equity dollars to use.
3. We recommend staff positions eligible for equity that are below the salary threshold of $30,000 per year be allowed an additional $300 when distributing equity, prior to the application of equity as detailed in the attached document. This allows these already low-paid positions to reach market faster.
4. We recommend that equity decisions be made at the Executive level for area needs based on these guidelines, with collaboration from directors/department heads.
5. Recognizing there are other sources of funding for salary increases, we recommend equity dollars not be given to any staff positions currently over 100% of market equity. These funds are to be used to bring current positions below market equity to a more equitable level and not used as a method of retention or merit.
6. We encourage departments with non-appropriated positions to follow the institutional priority of bringing their positions closer to market in the same manner as appropriated positions, as funds and circumstances allow.
7. Recognizing both the strengths and limitations to the CUPA-based benchmarks, we recommend executives be given limited discretion to make individual adjustments in equity-fund allocations within their units based on current institutional decisions. Any positions currently at or below 75% of market equity and any individual adjustment in equity-fund allocations should be documented with rationale to SUU administration.
8. We recommend no equity increases be given above 15% per employee per year, exclusive of the $300 spoken of in guideline #3.
9. The attached memo details a hypothetical equity scenario and how to distribute staff equity. This method of making equity adjustments allows more equity dollars be given to those positions furthest from their benchmark, while at the same time prevents "leapfrogging" of individuals. It is important that divergence from this scenario and guidelines be explained to SUU administration to ensure equity dollars are being used appropriately.

SUU MEMORANDUM

To: President's Council
From: Staff Association Executive Board

Subject: Hypothetical Equity Scenario for Staff Equity Distribution

Date: April 15, 2010

In making salary equity adjustments, the objective should be to bring underpaid staff members across campus up to an appropriate benchmark level. It is anticipated that as funds become available for salary equity adjustments, such funds may be insufficient to bring all underpaid staff members up to the target level. It is important that the available money should be distributed in a way that adds to all underpaid staff members and at the same time reduces internal inequities. A simple way to do this is illustrated below.

The following table shows a hypothetical situation in which there are ten staff members with varying salaries within a department, both in absolute terms and relative to their respective benchmarks. Currently, the department is at 91.35% of market equity and the total amount needed to bring each position to the applicable benchmark is $35,000. Suppose there is only $10,000 available for equity adjustments, plus funds for the additional $300 equity for employees below the benchmark that have a salary less than $30,000. The bottom two staff members, who are at or above the benchmark, get no salary adjustment. The others receive a percentage of the total available based on their share of the total gap. For example, the equity gap for the first staff member is 18.43% of the total gap (6,450/35,000). Two items should be noted: 1) those furthest below the benchmark get relatively larger adjustments so that external and internal inequities are reduced simultaneously and 2) the individuals who share the same benchmark (30,000 and 43,000) received equity in relation to their % of benchmark and as such, no leapfrogging has occurred for those individuals.

	Current Salary				***Equity Adjustment***			***New Salary***		
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36,250	31,500	86.90%	4,750	13.57%	1,357	-	4.31%	32,857	90.64%	3,393
60,800	55,270	90.90%	5,530	15.80%	1,580	-	2.86%	56,850	93.50%	3,950
43,000	39,300	91.40%	3,700	10.57%	1,057	-	2.69%	40,357	93.85%	2,643
30,000	27,530	91.77%	2,470	7.06%	706	300	2.56%	28,536	95.12%	1,464
23,500	21,900	93.19%	1,600	4.57%	457	300	2.09%	22,657	96.41%	843
43,000	40,600	94.42%	2,400	6.86%	686	-	1.69%	41,286	96.01%	1,714
84,750	85,000	100.29%	-	-	-	-	-	85,000	100.29%	-
30,000	32,000	106.67%	-	-	-	-	-	32,000	106.67%	-
422,100	389,350	**91.35%**	35,000	100.00%	**10,000**	900		400,250	**94.35%**	24,100