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3 **OT-AAUP**  
4 **PACKAGE PROPOSAL #2**  
5 **SEPTEMBER 24<sup>TH</sup>, 2020 (12PM TO 4PM BARGAINING SESSION)**  
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8 **Article [ ] on Academic Classification and Rank (previously labeled Appointments)**  
9 *-As OT-AAUP proposed on July 15th, 2020*  
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11 **Article [ ] on Evaluation, Promotion and Tenure (included in full)**  
12 *-As OT-AAUP proposes on September 24th, 2020*  
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14 **Article [ ] on Faculty Compensation (included in full)**  
15 *-As OT-AAUP proposes on September 24th, 2020*  
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18 ***This package proposal is presented by OT-AAUP***  
19 ***and must either be accepted or rejected in whole.***  
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21 ***If rejected, OT-AAUP retains the right to revert to***  
22 ***its previously presented proposal or stated position***  
23 ***with respect to each of the above-mentioned***  
24 ***proposals.***  
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44 ARTICLE [x]. EVALUATION, TENURE AND PROMOTION ~~FOR TENURE-~~  
45 ~~TRACK AND TENURED FACULTY~~\*\*

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47 \*\*This replaces OT-AAUP Proposal on Tenure and Promotion for TTF from 05/18/2020

48 \*\*This replaces OT-AAUP Proposal on Annual Evaluations of Faculty from 07/29/2020

49 \*\*This replaces OT-AAUP Proposal on Promotion for Non-Tenure Track Faculty from  
50 03/12/2020

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52 **Section 1. General Provisions.**

53 The following policies shall remain in effect with respect to bargaining unit faculty members, except  
54 as modified by this Agreement:  
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- 56 1. Indefinite Tenure Selection (OIT-20-030, as recommended by Faculty Senate on April 7,  
57 2009, and revised further, ending with the revision on December 5th, 2017, and  
58 subsequently approved on June 14th, 2018; along with the following supporting policies:  
59 Indefinite Tenure Selection Timeline, Academic Rank Portfolio Guidelines for Promotion,  
60 Tenure and Post Tenure Review)
- 61 2. Post-Tenure Review (OIT-20-035, as recommended by Faculty Senate on December 2,  
62 2010, and revised further on May 13th, 2014, and subsequently approved on June 14th,  
63 2018; along with the following supporting policies: Indefinite Tenure Selection Timeline,  
64 Academic Rank Portfolio Guidelines for Promotion, Tenure and Post Tenure Review)
- 65 3. Academic Rank and Promotion for Instructional Faculty (OIT-20-040, as recommended by  
66 Faculty Senate on April 7, 2009, and revised further, ending with the revision on May 5th,  
67 2015, and subsequently approved on June 22nd, 2015; along with the following supporting  
68 policies: Academic Rank Promotion Timeline for Instructional Faculty, Academic Rank  
69 Portfolio Guidelines for Promotion Tenure and Post Tenure Review)
- 70 4. Academic Rank and Promotion for Library Faculty (OIT-20-041, as recommended by  
71 Faculty Senate on April 5th, 2016, and approved on August 8th, 2016; along with the  
72 following supporting policies: Academic Rank Promotion Timeline for Instructional Faculty,  
73 Academic Rank Portfolio Guidelines for Promotion Tenure and Post Tenure Review)
- 74 5. Tenure Relinquishment (OIT-20-033, recommended by Faculty Senate on February 5th,  
75 2008, and approved on 11/12/08)
- 76 6. Faculty Evaluation Policy (OIT 21-040, as recommended by Faculty Senate on March 3,  
77 2009, and revised on April 1st, 2014, and subsequently approved on May 29th, 2014; along  
78 with attachments referenced as Attachments A and C)
- 79 7. Library Faculty Evaluation Policy (OIT 21-042, as recommended by Faculty Senate on  
80 February 2nd, 2010, and subsequently approved on August 13th, 2010; along with  
81 attachments referenced as Attachments A and B, FOP-L and APE-L respectively)
- 82 8. Promotion for Non-Tenure Instructional Faculty as recommended by Faculty Senate on  
83 June 6th, 2017, and attached to this in Appendix A.  
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85 For the purpose of this Article, a faculty member (as referenced in the policies listed above) refers to  
86 members of the bargaining unit to which the policies apply.  
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88 Bargaining unit members may follow the process in the Article [x] on Grievances to file a grievance  
89 in relation to processes outlined in any of policies referenced in this section.

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**Section 2. Timelines.**

Changes to the timelines described in the policies and the supporting materials referenced above shall be made in writing, and by mutual agreement between bargaining unit members and the Provost. Any agreement to changes in the timeline (for evaluation, promotion, tenure or post-tenure review) shall be included in the bargaining unit member’s academic file maintained by the Office of the Provost.

**Section 3. Revisions.**

Faculty Senate (through the Constitution of the Oregon Institute of Technology Faculty, Charter of the Faculty Senate of Oregon Institute of Technology Senate, and Bylaws of the Oregon Institute of Technology Faculty Senate) shall govern all areas related to appointments and evaluation that require the exercise of academic judgment. Revisions of policies affecting the evaluation, promotion and tenure of bargaining unit members (as listed in Section 1 of this Article) shall follow processes set by the Constitution of OIT Faculty, the Charter of Faculty Senate of OIT and the Bylaws of OIT Faculty Senate. Future revisions to the policies listed in Section 1 shall be incorporated by reference herein.

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135 **Appendix A**

136 **Oregon Institute of Technology**

137 **Academic Appointment, Rank and Promotion for Non-Tenure Track Instructional Faculty**

138 **OIT-20-046**

139 The purpose of this policy is to provide criteria and procedures for the evaluation and promotion of  
140 non-tenure track instructional faculty at the Oregon Institute of Technology. This policy serves to  
141 differentiate non-tenure track instructional faculty appointments from the traditional tenure track  
142 faculty. This policy defines the responsibilities of non-tenure track instructional faculty and serves to  
143 provide guidance to such faculty and their departments in assessing the appropriateness of their  
144 activities. Oregon Tech recognizes several faculty categories. Each category is created to be unique  
145 to the responsibilities and expectations of faculty in each category, but nothing in this document is  
146 to imply a hierarchy of importance between tenure track and other faculty.

147 As a public university, with constraints imposed by external factors, offering innovative and rigorous  
148 applied programs in fast evolving fields the university, department and program strive to maintain  
149 academic quality while supporting an environment that enables the emergence of new programming  
150 and the personnel to teach in those areas. This requires hiring policies that preserve a strong  
151 academic environment while providing the flexibility to allow development in new areas. The  
152 availability of tenure and non-tenure tracks ensures faculty can pursue successful careers while  
153 providing for institutional capacity to thrive. Whenever possible, the regular academic instruction of  
154 students should be the responsibility of faculty members to whom the institution is willing to make  
155 the commitment of tenure. The use of non-tenure track instructional faculty should be no more  
156 than 25 percent of the total instruction within any given department. As this policy and ranks of  
157 non-tenure track faculty are newly created, this percentage of non-tenure track faculty by department  
158 should be subject to regular review.

159 Non-tenure track instructional faculty should have the same opportunities to participate in  
160 governance and in curricular deliberations as tenure track faculty. Since their primary focus is on  
161 pedagogy, they will not be expected to participate at the same level as tenure track faculty in  
162 professional development or service and any metrics that may be used to monitor their performance  
163 should reflect that.

164 Promotion between ranks is intended to:

165 ● Reward excellence in teaching, along with satisfactory or exemplary performance in  
166 other areas.

167 ● Provide additional stability through the possibility of an earlier notice of annual  
168 appointment, along with the possibility of multi-year contracts.

169 **Evaluation**

170 The following criteria will be used to determine the faculty member's level of performance:

171 ● Maintaining high quality teaching

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- 172           ● Continuing professional growth
- 173           ● Performing service on behalf of the department
- 174           ● Demonstrating professional integrity and a willingness to cooperate with colleagues

175 The concentration of a faculty member’s professional activities may shift over time. As faculty  
176 progress through their careers, they may devote proportionately more time to different activities  
177 such as departmental service, program and curriculum development, teaching, advising, and/or  
178 activities related to professional development. Consequently, the expectations for individual faculty  
179 members may change. For the purpose of promotion between Instructor ranks, the fundamental  
180 criterion is meeting established expectations and goals within the four criteria listed above. Because a  
181 faculty member’s Annual Performance Evaluation (APE) is based on meeting objectives established  
182 in collaboration with the department chair and agreed upon in the Faculty Objectives Plan, the APE  
183 may guide reviewers in assessing the faculty member’s performance as the focus of his/her career  
184 evolves.

185 This policy contains criteria for evaluating faculty in instruction, professional development, and  
186 departmental service. The criteria in the following section are included here to guide the evaluation  
187 process.

188 *Instruction*

189 Given that this is their primary focus at Oregon Institute of Technology, Instructors will excel in  
190 teaching in the following ways:

- 191           ● Demonstrate knowledge of subject matter
- 192           ● Develop and revise curriculum to meet departmental and course objectives, as  
193 appropriate
- 194           ● Organize and deliver course materials to stimulate interest and discussion
- 195           ● Demonstrate growth in instruction
- 196           ● Employ a variety of assessment tools for evaluation of both teaching effectiveness and  
197 student learning
- 198           ● Maintain student numerical evaluations at a departmentally established level

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201 *Professional Development*

202 Faculty will advance knowledge in education and/or areas consistent with institutional,  
203 departmental, and personal goals and objectives. Examples include, but are not limited to:

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- 204 ● Participate in conferences, workshops and classes in education and/or discipline
- 205 ● Hold membership and participate in professional organizations within discipline

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207 *Departmental Service*

208 Faculty will contribute to the advancement of their department and programs consistent with  
209 departmental and personal goals and objectives. Examples include, but are not limited to:

- 210 ● Serve on departmental committees
- 211 ● Participate in student advising and/or student activities
- 212 ● Contribute to student recruitment and/or retention
- 213 ● Participate in special projects (i.e., grants, on-campus presentations and conferences,  
214 documentation development, etc.)

215 Additional criteria for promotion review include professional integrity and a willingness to  
216 cooperate with colleagues. The following lists are not exhaustive but rather indicative of conduct  
217 that promotion review committees should consider.

218 *Professional Integrity*

219 Candidates shall demonstrate professional integrity in the following ways:

- 220 ● Model high ethical standards as defined by the candidate's profession
- 221 ● Deal honestly, fairly and openly with colleagues and students
- 222 ● Respect others
- 223 ● Accept responsibility for actions and decisions, and their consequences
- 224 ● Follow through on commitments

225 *Willingness to Cooperate*

226 Candidates shall demonstrate a willingness to cooperate with colleagues in the following ways:

- 227 ● Accept responsibility for departmental projects that are compatible with and further its  
228 mission and long-term goals
- 229 ● Contribute to a stimulating intellectual environment in the candidate's department
- 230 ● Abide by departmental decisions
- 231 ● Follow policies and procedures of the institution

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232 Instructor I to Instructor II

233 Eligibility Requirements:

234 Master's degree or higher, or industry standard certification as previously defined and  
235 documented by the department and approved by the college dean.

236 Criteria for Promotion:

237 Demonstrate excellence in teaching.

238 Demonstrate service by contributing to departmental objectives.

239 Show promise of continuing professional development.

240 Instructor II to Senior Instructor I

241 Eligibility Requirements:

242 Four full years in current rank, master's degree or higher.

243 Criteria for Promotion:

244 Continue to demonstrate excellence in teaching, commensurate with rank.

245 Demonstrate service by contributing to departmental objectives.

246 Show promise of continuing professional development.

247 Senior Instructor I to Senior Instructor II

248 Eligibility Requirements:

249 At least four full years in current rank, master's degree or higher.

250 Criteria for Promotion:

251 Continue to demonstrate excellence in teaching, commensurate with rank.

252 Demonstrate service by contributing to departmental objectives.

253 Show evidence of continuing professional development.

254 By the end of week eight of winter term, the department chair shall organize a departmental  
255 committee for promotion review of non-tenure track instructors. All full-time department members,  
256 including the candidate, the chair, and tenured/non-tenured faculty, shall elect three committee  
257 members: two from within the department, and one from outside the department. If available, one  
258 member of the committee should be a non-tenure track faculty member. If there are fewer than two  
259 department members eligible to serve, additional committee members shall be elected from outside  
260 the department. Faculty ineligible to serve on the Promotion Review Committee include the  
261 department chair, adjuncts, and faculty being considered for promotion. Faculty who have  
262 relinquished tenure prior to retirement are eligible to serve. When selecting committee members  
263 from outside the department, preference should be given to members of other departments in which

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264 the candidate holds a split appointment, and then to faculty most likely to be knowledgeable about  
265 the candidate.

266 Within a week, the department chair shall convene the Promotion Review Committee, which shall  
267 select a chair. Each committee member shall sign the statement of ethics document.

### 268 **Promotion Review Committee's Responsibilities**

269 At its initial meeting, the Promotion Review Committee shall also set a date and location for a  
270 meeting to be held during the second or third week of spring term to accept written and verbal  
271 comments from students and other interested individuals. A separate comments meeting shall be  
272 held for each candidate. The chair of the Promotion Review Committee shall send the time and  
273 location information for the comments meeting along with the candidate's name to the Provost's  
274 Office by the end of winter term. The Provost's Office is responsible for advertising the comments  
275 meeting.

276 The comments meeting shall be conducted according to the following guidelines:

- 277 ● The candidate may not attend the meeting, but will have access to comments in the  
278 written report of the committee, as noted below
- 279 ● Only one person giving comments may be in the room with the committee at a given  
280 time
- 281 ● One member of the committee must keep careful notes of the meeting, indicating the  
282 name of each speaker and the content of the remarks. The notes must be sufficiently  
283 detailed to capture the essence of the testimony

284 The committee may solicit other information to confirm documentation in the candidate's portfolio  
285 or to verify comments gathered during its review. However, no anonymous input may be solicited or  
286 accepted, nor can sources be kept confidential. Anyone offering verbal or written information must  
287 be informed that the candidate will have access to that information and that source anonymity  
288 cannot be preserved. In the case of verbal information, careful notes of the conversation must be  
289 kept, including the participants' names.

290 If the candidate has a split appointment at the time of review, the committee shall solicit  
291 information from the appropriate departments in which the candidate has served.

292 The committee will prepare a separate written report for each candidate. The report must indicate  
293 the committee's recommendation, agreed to by a simple majority, and include the names and  
294 signatures of committee members and their individual votes. In addition, the committee shall list  
295 specific activities where the candidate has met or exceeded the promotion criteria and/or identify  
296 specific areas where the candidate has not met the criteria. The committee shall submit the report to  
297 the department chair by Friday of the sixth week of spring term, along with the candidate's  
298 portfolio, notes taken during the comments meeting, and all documentation accepted and used by  
299 the Review Committee in its deliberations. The content of the committee's deliberations are  
300 confidential and shall not be divulged by its members.

### 301 *Department Chair's Responsibilities*

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302 The department chair shall notify each candidate, in writing, of the committee's recommendation by  
303 the end of the seventh week of spring term.

304 The department chair shall attach a letter of support/non-support to the committee report and  
305 forward the report, the letter, the candidate's portfolio and all documentation to the dean by Friday  
306 of the eighth week of spring term.

307 *Dean's Responsibilities*

308 The college dean shall review the recommendation from the committee and the department chair's  
309 letter and write a letter of evaluation deciding an outcome. The dean shall decide promotion status  
310 in each case, and officially notify, by letter, each faculty member by the end of spring term. The dean  
311 shall send all documentation other than the e-portfolio related to the review to the faculty member's  
312 evaluative file in the Provost's Office in accordance with the Faculty Records Policy (OIT-22-010)  
313 by the end of spring term.

314 *Salary Increase for Promotion in Rank*

315 Salary Increase for Promotion in Rank shall be at least 5%.

316 *Extended Non-Tenure Track Appointments after Promotion in Rank*

317 To provide for a greater degree of job security than standard non-tenure track appointments,  
318 extended non-tenure track appointments may be recommended. Extended non-tenure track  
319 appointments are to be proposed only for faculty who have been promoted. Additionally, those  
320 appointments can only be made by mutual agreement of the department chair and dean, contingent  
321 on stability of funding and departmental needs.

322 Extended non-tenure track appointments have terms of up to two years and with administrative  
323 approval may be extended for one year at the end of each year. This type of appointment thereby  
324 leaves the faculty member at the beginning of each year with an appointment having the same length  
325 as the prior appointment.

326 **Candidate's Rights**

327 A candidate may request from the chair of the Promotion Review Committee copies of the written  
328 documentation collected by the Promotion Review Committee and all notes kept of oral testimony.  
329 The candidate must make this request in writing by Monday of the fourth week of spring term. The  
330 Promotion Review Committee Chair shall provide the documentation no later than Friday of the  
331 fourth week of spring term.

332 After reviewing testimony given at the comments meeting and all documentation accepted by the  
333 Promotion Review Committee, a candidate may request a meeting with the committee to challenge  
334 questions of fact. By majority vote, the committee may decide to expunge information from the  
335 documentation. This meeting must take place before the committee makes its recommendation and  
336 before the fifth week of spring term. Only questions of fact are open to challenge.

337 The faculty member may respond in writing to the committee report. The response will be attached  
338 to the report and sent to the dean through the department chair.

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339 At the conclusion of the review, a candidate may request from the provost, in writing, the  
340 Promotion Review Committee’s report, the department chair’s letter and the dean’s decision.

341 Grievance procedures mandated by OARs 580-021-0050 and 580-021-0055 are located in the Policy  
342 and Procedures portion of the Human Resources section of the Oregon Tech website.

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344 Recommended by:

345 Faculty Senate – June 6, 2017.

346 President’s Council –

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348 Approved: \_\_\_\_\_

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351 Date: \_\_\_\_\_

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## ARTICLE [x]. Compensation

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### Purpose.

The compensation article will detail the guidelines and procedures for the provision of salaries and specific non-salary benefits provided by the Employer to members of the Association. This article will dictate the procedures for identification ~~of subgroups within the association, appropriate comparators and calculations for base salary for each subgroup\_~~ of comparators for salary floor calculation, and provide tables of salaries based on years of service at each rank within each of the ~~groups—academic disciplines~~ in order to avoid wage compression. Furthermore, this article will detail adjustments and additions to base salary for the provision of additional education, ~~or training, or experience,~~ as well as additional compensation for ~~overload and online instruction as well as\_~~ potential merit based adjustments. ~~Finally, areas in the form of unique salary and non-salary compensation such as family medical leave, sabbatical, vacation, health and dental will be addressed as well\_~~

### Section 1. Association Subsets-Data for Comparator Analysis

Due to the unique and diverse makeup of Oregon Institute of Technology, there is no individual group of comparators that would enable a direct comparison of salaries and non-salary benefits for the purposes of salary identification. ~~Rather, a partitioning of faculty, each subset with their own comparison group, would better serve this purpose\_.~~ Rather than determining specific subsets, salary floors will be calculated as percentages based on data from the 2020 CUPA Annual Report for Faculty in Higher Education and the 2020 Professionals in Higher Education Annual Report from CUPA. For the purposes of comparison, the group of Tenure Track Faculty at Baccalaureate Institutions at the 2 digit CIP level has been chosen.

#### Subset 1. Engineering, Technology, and Mathematics

~~Faculty members of departments included in this group include all departments under the college of ETM (Engineering, Technology, and Management) except for the management department. Due to the type and applied nature of the mathematics courses, degree programs, and required expertise of faculty at Oregon Tech, the department of Applied Mathematics shall also share this comparison group so as to be compared with peer institutions rather than departments of mathematics education or pure mathematics.~~

#### Subset 2. Management

~~Faculty members of the department of Management will be compared against peer institutions selected based on schools with similar degree programs and emphasis. This will require its own comparison group as has been demonstrated historically within this institution.~~

#### Subset 3. Health, Arts, and Sciences

~~Faculty belonging to the school of Health, Arts, and Sciences will compose this group with the exception of the department of Applied Mathematics. Due to the unique structure of Oregon Tech, selection of an independent comparator group for this subset of faculty will provide a much more consistent representation of peer salaries.~~

#### Subset 4. Library Faculty

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~~Oregon Tech librarians are classified as faculty by both Parties. These are not faculty teaching library sciences, and thus alternative methods of position classification and salary determination is necessary for this subgroup as the standard methods for the above groups do not apply.~~

~~-~~

## Section 2. Disciplinary Codes

For faculty subsets excluding library faculty, disciplinary codes (CIP) are assigned based on their academic department/assignment. Departmental comparisons for salary calculation are dependent on the assigned CIP codes. The Classification of Instructional Program (CIP) codes provide a “taxonomic scheme” developed by the U.S. Department of Education’s National Center for Educational Statistics. A complete listing of CIP codes is provided at

<https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=56>

The list of CIP codes for departments is provided in Appendix A

Librarians are a group of faculty with departmental duties that differ from standard academic department. To identify the appropriate job descriptions, meetings were conducted with the librarian group to determine their job descriptions. As discussed at this meeting, all librarians are responsible for general librarian services, while about 50% of each of their time is spent on one or two areas of specialty. Once the job duties were identified, the matching CUPA positions were selected as a data source for the Librarian Study. This list is provided in Appendix A. The average salary of these position codes, as retrieved from the 4 year college group from the CUPA annual report on professional salaries will be used as the baseline for determining Oregon Tech librarian wages.

Bargaining unit members classified as professor of practice, clinical instructor and visiting professor shall be compensated the same as Instructor ranks.

### CIP Codes for Oregon Tech Academic Departments

Department	CIP
Civil Engineering	14
Communication	09
Computer Systems Engineering Technology	14
Dental Hygiene	51
Medical Laboratory Sciences	51
Electrical and Renewable Energy Engineering	14
Emergency Medical Services	51
Geomatics	14
Humanities and Social Sciences	42
Library	NA
Management	52
Manufacturing and Mechanical Engineering	14

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Mathematics and Statistics, Applied	30
Medical Imaging Technology	51
Natural Sciences	26
Respiratory Care	51

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450 **Section 3. ~~Comparator Studies~~**

451 ~~Comparator groups will be determined based on institutions similar to Oregon Institute of~~  
 452 ~~Technology based on weighted averages of data from the IPEDS (Integrated Postsecondary~~  
 453 ~~Education Data System) data base. During each cycle of re-negotiation, comparator lists will be~~  
 454 ~~updated based on the methodology provided below. This methodology will mimic the MGT~~  
 455 ~~consulting group 2017 report commissioned by Oregon Tech with changes made to the weightings~~  
 456 ~~based on producing three separate comparator lists. Library faculty will have a different procedure~~  
 457 ~~entirely due to the necessity of differing calculation methods.~~

458  
 459 ~~Subsection 1: Engineering, Technology, and Mathematics~~

460 ~~Comparator Group: Using Data from IPEDS, a comparator group will be based on the top 50~~  
 461 ~~institutions identified from the following weighted categories:~~

- 462 ~~1. Size (10% of total score):~~
  - 463 ~~a.) Total Expenditure (excluding Capital Outlays~~
  - 464 ~~b.) Estimated Total FTE Enrollment~~
- 465 ~~2. Selectivity (10% of total score):~~
  - 466 ~~a.) Composite of SAT/ACT Midpoint Percentile~~
- 467 ~~3. Resources (15% of total score):~~
  - 468 ~~a.) Total Expenditures per FTE student~~
  - 469 ~~b.) Total Expenditures per Degree Awarded~~
  - 470 ~~c.) Endowment per FTE Student~~
- 471 ~~4.) Institutional Characteristics (15% of total score):~~
  - 472 ~~a. Percent of Degrees/Awards less than Bachelor's~~
  - 473 ~~b. Percent of Degrees/Awards greater than Bachelor's~~
  - 474 ~~c. Instruction Expenditure as percent of Instruction/Research/Public Service~~
- 475 ~~5.) Program Offerings (50% of total score)~~
  - 476 ~~a.) Percent of Bachelor Degrees in CIP 14~~
  - 477 ~~b.) Percent of Bachelor Degrees in CIP 15~~
  - 478 ~~c.) Percent of Bachelor Degrees in CIP 27 and 30~~
  - 479 ~~d.) Number of Bachelor Degrees in CIP 14~~
  - 480 ~~e.) Number of Bachelor Degrees in CIP 15~~
  - 481 ~~f.) Number of Bachelor Degrees in CIP 27 and 30~~

482  
 483 ~~Subsection 2: Management~~

484 ~~Comparator Group: Using Data from IPEDS, a comparator group will be based on the top 50~~  
 485 ~~institutions identified from the following weighted categories:~~

- 486 ~~1. Size (10% of total score):~~
  - 487 ~~a.) Total Expenditure (excluding Capital Outlays~~
  - 488 ~~b.) Estimated Total FTE Enrollment~~
- 489 ~~2. Selectivity (10% of total score):~~
  - 490 ~~a.) Composite of SAT/ACT Midpoint Percentile~~

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- 491 ~~———— 3. Resources (15% of total score):~~
- 492 ~~———— a.) Total Expenditures per FTE student~~
- 493 ~~———— b.) Total Expenditures per Degree Awarded~~
- 494 ~~———— c.) Endowment per FTE Student~~
- 495 ~~———— 4.) Institutional Characteristics (15% of total score):~~
- 496 ~~———— a.) Percent of Degrees/Awards less than Bachelor's~~
- 497 ~~———— b.) Percent of Degrees/Awards greater than Bachelor's~~
- 498 ~~———— c.) Instruction Expenditure as percent of Instruction/Research/Public Service~~
- 499 ~~———— 5.) Program Offerings (50% of total score)~~
- 500 ~~———— a.) Percent of Bachelor Degrees in CIP 52~~
- 501 ~~———— d.) Number of Bachelor Degrees in CIP 52~~

502  
503 ~~Subsection 3: Health, Arts, and Sciences~~

504 ~~Comparator Group: Using Data from IPEDS, a comparator group will be based on the top 50~~  
505 ~~institutions identified from the following weighted categories:~~

- 506 ~~———— 1. Size (10% of total score):~~
- 507 ~~———— a.) Total Expenditure (excluding Capital Outlays~~
- 508 ~~———— b.) Estimated Total FTE Enrollment~~
- 509 ~~———— 2. Selectivity (10% of total score):~~
- 510 ~~———— a.) Composite of SAT/ACT Midpoint Percentile~~
- 511 ~~———— 3. Resources (15% of total score):~~
- 512 ~~———— a.) Total Expenditures per FTE student~~
- 513 ~~———— b.) Total Expenditures per Degree Awarded~~
- 514 ~~———— c.) Endowment per FTE Student~~
- 515 ~~———— 4.) Institutional Characteristics (15% of total score):~~
- 516 ~~———— a.) Percent of Degrees/Awards less than Bachelor's~~
- 517 ~~———— b.) Percent of Degrees/Awards greater than Bachelor's~~
- 518 ~~———— c.) Instruction Expenditure as percent of Instruction/Research/Public Service~~
- 519 ~~———— 5.) Program Offerings (50% of total score)~~
- 520 ~~———— a.) Percent of Bachelor Degrees in CIP 9 (3% of weighting)~~
- 521 ~~———— b.) Percent of Bachelor Degrees in CIP 26 (3% of weighting)~~
- 522 ~~———— c.) Percent of Bachelor Degrees in CIP 42 (6% of weighting)~~
- 523 ~~———— d.) Percent of Bachelor Degrees in CIP 51 (13% of weighting)~~
- 524 ~~———— e.) Number of Bachelor Degrees in CIP 09 (3% of weighting)~~
- 525 ~~———— f.) Number of Bachelor Degrees in CIP 26 (3% of weighting)~~
- 526 ~~———— g.) Number of Bachelor Degrees in CIP 42 (6% of weighting)~~
- 527 ~~———— h.) Number of Bachelor Degrees in CIP 51 (15% of weighting)~~

528  
529 ~~Subsection 4: Library Faculty~~

530 ~~As the standard CUPA data that will be used to retrieve faculty salaries describes faculty teaching in~~  
531 ~~library sciences rather than functioning as professional librarians, a composite list will be formed~~  
532 ~~from the previous lists and a different data source used to determine library position salaries:~~

- 533 ~~————~~
- 534 ~~1.) The composite list shall be composed of the first twenty (20) schools from subsection 1~~  
535 ~~(Engineering, Technology, and Mathematics), twenty (2) schools from subsection 3 (Health, Arts,~~  
536 ~~and Science), and ten schools from subsection 2 (Management):~~

537 ~~————~~

538 ~~2.) Library salaries for comparison will need to be pulled from the Data on Demand CUPA~~  
539 ~~professional survey. To identify the appropriate job descriptions, meetings were conducted with the~~  
540 ~~librarian group to determine their job descriptions. As discussed at this meeting, all librarians are~~  
541 ~~responsible for general librarian services, while about 50% of each of their time is spent on one or~~  
542 ~~two areas of specialty. Once the job duties were identified, the matching CUPA positions were~~  
543 ~~selected as a data source for the Librarian Study.~~

<u>Library Position Code/Title</u>
<del>[402020] Librarian – Head of Technical</del>
<del>[402030] Librarian – Head of Public</del>
<del>[402040] Librarian – Head of Cataloging</del>
<del>[402050] Librarian – Head of Collection</del>
<del>[402060] Librarian – Head of Special</del>
<del>[402065] Librarian – Systems/Digital</del>
<del>[402170] Librarian – Head of Reference</del>

### 545 Section 3. Maintenance of Salary Relevance

#### 546 Subsection 5: Maintenance and Transparency

547  
548 a.) ~~Comparators will be re-calculated once every negotiation period and when any major~~  
549 ~~shift happens (for example, changing Carnegie classification or other major component of the~~  
550 ~~weighting where comparators are determined.)~~

551  
552 ~~\_\_\_\_\_ b.) The lists of comparators will be published on the Office of Human Resources website.~~

### 553 Section 4. ~~Educational or Credential~~ Non-promotion Related Salary

#### 554 Adjustments

##### 555 a.) ~~Adjustments for Education or Training~~

556 Faculty who hold a degree equivalent to a terminal degree as awarded in the United States within  
557 their teaching field or a related field shall be awarded a 3% adjustment to their base salary over the  
558 minimum calculated from the base salary tables. Faculty without a terminal degree that maintain an  
559 industry licensure or certification required for practice shall be awarded a 1.5% adjustment to their  
560 base salary.

561  
562 The terminal degree for all the CIP codes listed above, except CIP 51 and Library, is a PhD.

563 For CIP 51 and Library the terminal degree is a Master's.

##### 564 b.) ~~Tenure Adjustment~~

565 ~~\_\_\_\_\_ Faculty who are awarded indefinite tenure shall receive an increase to their base salary equal~~  
566 ~~to 4% of the current base salary during the next academic year contract.~~

### 567 Section 5. Promotion and Review Salary Adjustments

570  
571 a.) All bargaining unit faculty members in the Tenure-Track and Tenured Professor classification  
572 who achieve promotion will receive an increase of ~~at least 10% of the base salary or to the floor of~~  
573 ~~the faculty member's discipline rank, whichever is greater.~~

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575 1.) at least 6% of their base salary or to the floor of the faculty member's discipline rank at  
576 the proper level, whichever is greater, when being promoted to Associate Professor.

577  
578 2.) at least 10% of their base salary or to the floor of the faculty member's discipline rank at  
579 the proper level, whichever is greater, when being promoted to full professor.

580  
581 b.) A bargaining unit faculty member with an appointment of Instructor 1 without a master's degree  
582 or higher who earns a higher degree or credential shall be awarded with a change to the appropriate  
583 salary (step and column) during the next annual appointment. Likewise, a tenure track or tenured  
584 faculty obtaining a credential or terminal degree shall be awarded with a change to the appropriate  
585 salary (multiplier, step and column) during the next annual appointment. If any of these changes  
586 coincide with a promotion, the base salary post promotion will be accounted at the appropriate step  
587 corresponding with years of service under the new classification.

588  
589 c.) Faculty at the Associate and Full Professor levels who have earned tenure undergo a post-tenure  
590 review process to assess merit. Successful outcomes of a post-tenure review process will be  
591 represented with a merit wage adjustment as follows:

592 1) Satisfactory – The faculty member shall skip 1 step increase (i.e. from step 15 to step 17)

593 2) Excellent – The faculty member shall skip 2 step increases (i.e. from step 15 to step 18) a  
594 \$2500 one-time bonus shall be awarded to the faculty member. The \$2500 one-time bonus shall be  
595 updated yearly based on the yearly average Western Region CPI-U as reported by the Bureau of  
596 Labor Statistics.

597 3) Exemplary – The faculty member shall skip 2 step increases (i.e. from step 15 to step 18)  
598 and a \$5000 one-time bonus shall be awarded to the faculty member. The \$5000 one-time bonus  
599 shall be updated yearly based on the yearly average Western Region CPI-U as reported by the  
600 Bureau of Labor Statistics.

601 4) Faculty at the Assistant Professor level may not have a base salary exceeding the specific  
602 salary floor of Associate Professors.

603 5) Faculty at the Associate Professor level may not have a base salary exceeding the specific  
604 salary floor of Full Professors.

605 6) Faculty receiving an unsatisfactory review during a post-tenure review will undergo an  
606 interim post-tenure review during the next year. No financial incentive will be awarded for a  
607 faculty achieving "Satisfactory" on an interim post tenure review. Excellent or Exemplary  
608 outcomes for an interim post-tenure review shall be rewarded as stated in (c.2) and (c.3) of  
609 this Section.  
610

## 611 **Section 6. Base Salary Calculations**

612 Base salary (floor salary) will be calculated for each department based on a combination of the CIP  
613 code for that department and the mean salary represented in the comparator institutions data as  
614 retrieved from the CUPA database from the 2018-2019 school year described in Section 1 of this  
615 Article. Step increases based on years of service (and education for non-tenure track  
616 faculty)/credential will be represented by tables within the appendix Appendix B of to this article.

617  
618 Base salary shall be adjusted yearly, on September 15th of each academic year for the duration of  
619 this Agreement, according to the cost of living adjustments stipulated below, and for all contracts,  
620 regardless of individual starting dates.  
621



## Section 7. Cost of Living Adjustments (COLA)

a.) FY 2019-2020. Effective retroactively to September 15th, 2019, bargaining unit members shall receive a cost of living adjustment of 4.05% to their base salary for the academic year 2019-2020.

b.) Contracts starting in Fall of 2020 will move all bargaining members up to the base salary they should be earning according to the tables provided in [the Appendix Appendix B of this Article](#). Those above their current step will not have a change in base salary outside of the cost of living adjustment noted above.

c.) Further fiscal cost of living adjustments will be set equal to the 12-month average regional Consumer Price Index (CPI-U) for the previous 12 months as reported by the Federal Bureau of Labor Statistics for the Western Region. These cost of living adjustments will be added to base salaries effective September 15th of every academic year, for all contracts, regardless of individual contract starting dates. This adjustment shall occur every academic year covered under this Agreement, retroactive to the starting date of each academic year.

## Section 8. Retention and Equity Adjustments

### Retention

In order to facilitate retention of faculty, the Provost or designee together with OT-AAUP representatives will establish a retention salary adjustment process describing the criteria and procedures to be used in making a retention adjustment for bargaining unit faculty members. The retention salary adjustment policy will be published on the Office of Human Resources website. The Provost or designee will notify the Association of any retention adjustments made to the salary of a bargaining unit member.

### Equity Studies

a.) Academic Affairs administration will conduct an annual equity review of compensation for faculty at all ranks and positions. This analysis should review faculty compensation based on Oregon's Equity Pay Act to determine there is no bias based on a protected category. The review should be based on the following qualifying systems:

- 1.) Faculty Rank (see rank section)
- 2.) Seniority

b.) An annual report of this review will be made available to faculty by posting on the Office of Human Resources website.

c.) The process proposed for retention and equity is grievable under this Agreement, as per the Article [x] on Grievances.

Salary adjustments for retention or equity will be made to the base salary by changing the "step" of the faculty member(s) on the salary tables within this Article. Record of the reasons for the step change will be reflected in the faculty personnel files and within the Office of Human Resources database system so that results of compensation analysis for equity and potential discrimination will not be biased due to loss of this information.

## Section 9. Stipends

667 Stipends shall be compensated and recorded separately from base salary and never included within  
668 this calculation so as to preserve the value of the base salary for comparison against step and time in  
669 rank. Clear documentation of the reasons for stipends will be maintained. The purpose of this is to  
670 maintain comparability between faculty salaries for purposes of analysis of compression and possible  
671 sources or claims of wage, gender, age, or other discrimination [in order to maintain transparent](#)  
672 [compliance with Oregon legal statutes and provide transparency in any grievance procedure.](#)

673

## 674 **Section 10. Merit Compensation**

675 The Employer may allocate funds to be distributed for merit compensation on a yearly basis, for all  
676 bargaining members. A Merit Committee shall be appointed (including equal representatives from  
677 Academic Affairs and OT-AAUP, with no more than 6 total serving on the committee) to determine  
678 the appropriate distribution of these funds annually. Standards for awarding merit raises shall be  
679 established and reviewed by the Merit Committee annually, and communicated to all faculty by the  
680 end of the fourth week of Fall term on the Office of the Provost's website. Individual faculty, the  
681 Office of Human Resources and the Office of the Provost shall be informed by the end of May of  
682 every academic year of merit pay awards. Allocated merit funds shall be expended on a yearly basis.

683

## 684 **Section 11. Sabbatical Leaves**

685 Sabbatical compensation will be as addressed in Article [x] on Sabbatical Leave. Faculty on  
686 sabbatical shall still be eligible for pay increases due to step (years of service), promotion, COLA,  
687 and other pay increases during their time on sabbatical.

688

## 689 **Section 12. Geographic Adjustments**

690 Due to differing locations of campuses, costs of living and travel differ for bargaining members  
691 located at different campuses.

692

693 Metro Location Housing Stipend: Due to the high cost of housing in metro locations (Seattle,  
694 Wilsonville, or Salem), faculty working at a campus in a metro location will receive a Geographic  
695 Stipend in addition to their salary. The value of the stipend will be equal to the difference between  
696 the housing allowances used by the U.S. Department of Veterans Affairs for Klamath Falls and the  
697 metro campus, plus 20%. The housing allowance calculator is located on the [Veterans Affairs](#)  
698 [website under GI Bill Comparison Tool](#). For example, in November 2019, the GI- bill housing  
699 allowance for Oregon Tech students attending school on the Klamath Falls Campus was  
700 \$1,290/month and \$2,409/month for Portland Metro Students. The difference between these two  
701 values is \$1,119/month, and therefore the monthly stipend would be \$1342.80/month would be  
702 paid to Portland Metro faculty; this is a total of \$16,113.60 per year.

703

704 This tool will be used annually in September to calculate the Geographic Stipend metro area faculty  
705 will receive for that academic year. This stipend will be equal for all faculty members employed on  
706 that campus and will be paid out for 12-months for all faculty regardless of the faculty's contract  
707 duration.

708

## 709 **Section 13. Payment of Salary**

710 Members of the Association may opt to be paid in 9 or 12 equal monthly installments consistent  
711 with IRS regulations. Salary shall be paid by direct deposit except in the case of emergency or unless  
712 another method of payment is required by law. Pay for yearly overload shall be added to the

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713 member's payment in June paycheck. Corrections to monthly salary paychecks shall be implemented  
714 as soon as possible, but no more than 30 days from a faculty's notification to the Office of Human  
715 Resources of payment errors. Payment options shall be agreed to with the affected faculty.  
716

#### 717 **Section 14. Additional Initial CBA Salary Topics**

718 The 2019-2020 CBA is the first negotiation period with the Association and the Employer. As such,  
719 individual adjustments and calculations must be included within this documentation.  
720

##### 721 A. Geographic Adjustment Normalization

722 Faculty at the Wilsonville campus were presented with differing contractual implementation of the  
723 geographic stipend model when first implemented. For some, this stipend was added to base salary,  
724 others had it added as a "stipend," and still others did not receive the stipend adjustment at all.  
725 These NEED to be fixed. All faculty receiving a metro campus stipend will have the stipend  
726 separated from their base salary and included under a "stipend" category. Faculty who do not  
727 currently get this stipend will be awarded the metro location stipend.  
728

##### 729 B. Non-regression of Wages

730 For faculty members whose current wages exceed those provided within the tables, no downward  
731 adjustment of wages shall take place.  
732

733 **Appendix A: CIP Codes for Oregon Tech Academic Departments**

734 CIP Codes for Oregon Tech Academic Departments

735

<u>Department</u>	<u>CIP</u>
<u>Civil Engineering</u>	<u>14</u>
<u>Communication</u>	<u>09</u>
<u>Computer Systems Engineering Technology</u>	<u>14</u>
<u>Dental Hygiene</u>	<u>51</u>
<u>Medical Laboratory Sciences</u>	<u>51</u>
<u>Electrical and Renewable Energy Engineering</u>	<u>14</u>
<u>Emergency Medical Services</u>	<u>51</u>
<u>Geomatics</u>	<u>14</u>
<u>Humanities and Social Sciences</u>	<u>42</u>
<u>Library</u>	<u>NA</u>
<u>Management</u>	<u>52</u>
<u>Manufacturing and Mechanical Engineering</u>	<u>14</u>
<u>Mathematics and Statistics, Applied</u>	<u>30</u>
<u>Medical Imaging Technology</u>	<u>51</u>
<u>Natural Sciences</u>	<u>26</u>
<u>Respiratory Care</u>	<u>51</u>

736

737

<u>Library Position Code/Title</u>
<u>[402020] Librarian - Head of Technical</u>
<u>[402030] Librarian - Head of Public</u>
<u>[402040] Librarian - Head of Cataloging</u>
<u>[402050] Librarian - Head of Collection</u>
<u>[402060] Librarian - Head of Special</u>
<u>[402065] Librarian - Systems/Digital</u>
<u>[402170] Librarian - Head of Reference</u>

738

739

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740  
741

Appendix B: Salary Tables

Multiplier	1	Base			55404				
Step	Instructor - No Masters	Untenured Assistant Professor	Instructor 1 With Masters	Instructor 2	Associate Professor	Senior Instructor 1	Full Professor	Senior Instructor 2	
0	53742	55404	56513	59283	-	-	-	-	
1	54817	56513	57643	60469	-	-	-	-	
2	55913	57643	58796	61678	-	-	-	-	
3	57031	58796	59972	62912	-	-	-	-	
4	58172	59972	61171	64170	-	-	-	-	
5	59335	61171	62394	65453	-	-	-	-	
6	60522	62394	63642	66762	66137.64	67460	-	-	
7	61732	63642	64915	68097	67460	68809	-	-	
8	62967	64915	66213	69459	68809	70185	-	-	
9	64226	66213	67537	70848	70185	71589	-	-	
10	65511	67537	68888	72265	71589	73021	-	-	
11	66821	68888	70266	73710	73021	74481	80323	81929	
12	68157	70266	71671	75184	74481	75971	81929	83568	
13	69520	71671	73104	76688	75971	77490	83568	85239	
14	70910	73104	74566	78222	77490	79040	85239	86944	
15	72328	74566	76057	79786	79040	80621	86944	88683	
16	73775	76057	77578	81382	80621	82233	88683	90457	
17	75251	77578	79130	83010	82233	83878	90457	92266	
18	76756	79130	80713	84670	83878	85556	92266	94111	
19	78291	80713	82327	86363	85556	87267	94111	95993	
20	79857	82327	83974	88090	87267	89012	95993	97913	

742  
743  
744  
745  
746  
747  
748  
749

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<u>Subject</u>	<u>CIP</u>	<u>Multiplier</u>
<u>Communication</u>	<u>9</u>	<u>1</u>
<u>Engineering</u>	<u>14</u>	<u>1.2884</u>
<u>Biological (Natural) Sciences</u>	<u>26</u>	<u>1.0559</u>
<u>Mathematics</u>	<u>30</u>	<u>1.1426</u>
<u>Psychology (HSS)</u>	<u>42</u>	<u>1.0555</u>
<u>Allied Health Fields</u>	<u>51</u>	<u>1.1614</u>
<u>Management</u>	<u>52</u>	<u>1.3687</u>
<u>Library</u>	<u>-</u>	<u>1.1673</u>

<u>Other</u>	<u>Multiplier</u>
<u>Terminal Degree</u>	<u>1.03</u>
<u>Industry Certification or License</u>	<u>1.015</u>
<u>Tenure</u>	<u>1.04</u>

750

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