

Introduction

To support analysis of the **Full Time Equivalent (FTE)** levels of our campus workforce, monthly actual percent time worked from the Payroll Personnel System (PPS) is loaded on a monthly basis into Human Capital Planning Reporting (HCPRptg), and can be viewed at the year total level in the **HCP003 Job Code Trend by Actual Payroll \$ and FTE Report**. Historical FTE data is available as of FY2011-12.

Sample HCP003: Job Code Trend by Actual Payroll Dollars and FTE Report

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Job Code Trend by Actual Payroll \$ and FTE												
	2011-12		2012-13		2013-14		2014-15		2015-16		5-YR CAGR	
	\$	FTE	\$	FTE	\$	FTE	\$	FTE	\$	FTE	\$	FTE
Ladder	202,907,680	1,237.85	209,074,479	1,244.48	222,098,659	1,269.13	232,477,560	1,274.33	239,430,433	1,271.77	4%	1%
Lecturer-Security of Appt L2	2,052,169	20.16	2,054,415	19.50	1,714,490	16.26	1,910,092	16.75	2,097,450	18.51	1%	(2%)
Agronomists	9,356,553	70.69	9,635,688	70.22	9,869,139	69.79	9,854,611	67.26	9,012,333	57.35	(1%)	(5%)
Regular Faculty	214,316,402	1,328.70	220,764,582	1,334.19	233,682,288	1,355.17	244,242,264	1,358.34	250,540,216	1,347.62	4%	-
Emeriti Professors L2	827,454	1.19	1,028,149	2.36	623,906	1.07	75,947	-	39,733	-	(53%)	NA
Emeriti Lecturers-Security of Appt L2	-	-	-	-	2,400	-	-	-	-	-	NA	NA
Faculty Emeriti	827,454	1.19	1,028,149	2.36	626,306	1.07	75,947	-	39,733	-	(53%)	NA
Lecturer L2	25,111,483	336.62	26,443,851	347.42	27,092,270	363.02	30,717,657	387.94	31,135,298	391.97	6%	4%
Visiting/Adjuncts	9,703,946	84.77	9,767,210	82.71	9,969,533	84.95	10,197,748	80.58	10,169,120	79.60	1%	(2%)
Other (clinical, instructors)	8,433,780	60.19	9,199,782	63.54	9,715,675	66.71	11,473,052	69.18	11,556,305	72.75	8%	5%
Other Faculty	43,249,209	481.58	45,410,842	493.66	46,777,477	514.68	52,388,457	537.70	52,860,723	544.31	5%	3%
Researchers	64,068,169	843.78	65,434,916	863.60	63,165,621	806.62	57,668,464	715.23	55,205,684	671.20	(4%)	(6%)
Post Docs	42,385,888	769.41	45,206,689	810.72	45,222,849	790.69	47,028,912	793.39	48,417,711	806.93	3%	1%
Librarians	8,265,283	98.05	7,752,901	92.32	7,789,650	88.91	8,179,592	91.61	8,488,479	94.33	1%	(1%)
Acad Administrators	21,532,824	153.44	22,665,127	158.48	23,563,345	156.47	24,345,369	155.94	24,174,130	150.46	3%	-
Extention / Cont. Ed.	10,992,381	12.71	12,027,241	13.42	8,659,177	13.25	9,328,879	14.34	9,576,396	14.69	(3%)	4%
Other	13,103,327	74.22	13,043,570	62.59	17,467,331	66.93	19,730,673	80.60	20,786,312	79.20	12%	2%
Other Academic	160,347,872	1,951.61	166,130,444	2,001.13	165,867,974	1,922.87	166,281,889	1,851.13	166,648,712	1,816.81	1%	(2%)
Grad St. Instructor (GSI) L2	34,500,086	909.84	36,289,709	941.01	36,920,641	957.21	39,913,305	982.90	41,043,119	982.79	4%	2%
Grad St. Researcher (GSR) L2	42,799,574	1,021.88	42,366,095	971.89	41,452,237	922.38	41,681,264	896.98	46,127,029	940.09	2%	(2%)
Reader/Tutor/Other L2	3,630,376	157.95	3,739,934	160.00	3,906,706	165.94	4,251,306	173.15	4,707,244	180.16	7%	3%
Grad Student Titles	80,930,036	2,089.66	82,395,738	2,072.89	82,279,584	2,045.53	85,845,875	2,053.04	91,877,392	2,103.04	3%	-
Academic Subtotal	499,670,972	5,852.74	515,729,754	5,904.24	529,233,628	5,839.32	548,834,432	5,800.21	561,966,776	5,811.78	3%	-
Managers & Supervisors	88,318,951	877.05	91,343,548	886.69	100,487,064	930.28	109,450,552	952.04	110,684,128	947.27	6%	2%
Professionals	264,219,956	3,645.91	288,697,674	3,874.52	319,217,103	4,158.01	345,764,623	4,354.99	361,615,505	4,472.88	8%	5%
Operational & Technical	97,486,631	2,199.78	105,238,031	2,273.25	107,195,835	2,235.03	106,167,509	2,079.84	106,202,976	2,046.61	2%	(2%)
N/A or Not Classified	21,739,003	372.35	22,666,813	376.70	23,259,107	377.80	22,985,065	358.25	24,161,904	364.53	3%	(1%)
Staff	471,764,540	7,095.09	507,946,066	7,411.16	550,159,109	7,701.11	584,367,748	7,745.12	602,664,514	7,831.29	6%	2%
Student Titles	24,845,251	945.67	25,621,697	964.76	25,623,113	952.92	25,592,215	933.12	27,273,861	950.87	2%	-
Unknown Jobs & BFS Journals	5,990,401	0.08	5,909,439	0.36	6,686,917	0.09	16,674,374	0.15	10,389,838	0.07	15%	(3%)
GRAND TOTAL	1,002,271,16	13,545.31	1,055,206,95	13,935.02	1,111,702,76	14,152.52	1,175,468,76	14,136.42	1,202,294,98	14,243.51	4%	1%

* 5-YR CAGR (compound annual growth rate) calculates the mean 5-year growth over the 4 periods.
 * Managers and Supervisors are combined for purposes of this report. Campus-wide, 28% of the cost generally is attributable to supervisors (43% of FTE).
 * For certain employees who do not work all 12 months, the yearly average FTE will be understated.

POV
 Scenario: Actual, Version: Final, Entity: '...', Fund: Current_Funds, Chart1: Chart1, Chart2: Chart2, Period: YearTotal, Time Series: Periodic
 Dollars - Account: Salaries_and_Wages, Earn Code: Earn_Code
 FTE - Account: Payroll Average FTE Earn Code: Regular_and_Overtime
 HCP003 - Job Code Trend by Actual Payroll \$ and FTE - HCPRptg

Run Date: 04/27/2017
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How to Use HCP003

Use the HCP003 to compare the 5-year trend for the Payroll dollars and FTE amounts within your organization by Job Code. This report answers the question: “What is your unit’s relative cost among various types of jobs over the past 5 years, e.g., shifts among professorial ranks (assistant, associate, professor)?”

For the Entity and Fund level chosen in the point of view, this report displays the HR Census Job Code Hierarchy in the rows. The hierarchy is drillable from the highest level, Job Family Description, to the individual Job Code Number. Pooled Positions are included in the report and are identified by the Pool Position Type name followed by (JC), [e.g. Summer Salary (JC), Lecturer (JC), etc.]

The columns include both Actual Payroll \$’s and Payroll FTE for the last 5 closed Fiscal Years for each level of the Job Code hierarchy displayed. The last 2 columns include the percent change for \$s and FTE from FY12 to FY16. The percent change is calculated using compound annual growth rate (CAGR) to better represent the year-over-year growth over several years.

HCP003 Report Metrics

\$ = Actual Payroll Dollars (= Actual Salaries_And_Wages Account in HCP)

- **Definition:** Actual Payroll \$ represents the actual dollars paid to all employees in a month and includes dollar amounts from BFS journals. This metric matches the BAIRS GL Detail and GL Summary reports.
- **Calculation:** Sum of Actual dollar amounts from the BFS General Ledger (payroll transactions and BFS journals).
- **Source & Timing:** BFS loaded monthly to CalPlanning.

FTE = Actual Payroll FTE

- **Definition:** Actual Payroll FTE reflects the number of total hours worked, divided by the maximum number of compensable or working hours in a full-time schedule.
- **Calculation:** Actual Payroll FTE calculates the FTE for employees based on hours worked (non-exempt employees) or percent time (exempt employees).
- **Source & Timing:** Payroll Personnel System (PPS) loaded monthly to CalPlanning.

5-YR CAGR (Compound Annual Growth Rate)

- **Definition:** The CAGR is the mean annual growth rate over a period of time longer than one year.
- **Calculation:** $[(\text{FTE in the most recent year} / \text{FTE in the earliest year})^{1 / \text{number of periods}}] - 1$
Example: $[(\text{FTE in FY15} / \text{FTE in FY11})^{1 / \text{number of periods}}] - 1$. This report includes a 5 year CAGR to calculate the mean 5-year growth over the 4 periods.

Job Code

- **Definition:** Job Codes are established by Human Resources to identify particular roles.
 - For job code details, see the [Cal Answers Campus Workforce Planning Wiki](#).
 - **Unknown Jobs & BFS Journals** consist of BFS Journals (which do not have job codes attached), old job codes from before the implementation of [Career Tracks](#) (formerly known as Career Compass), and invalid job codes.
- **Source & Timing:** Human Capital Management (HCM)

HCP003 Report Considerations

When reviewing the HCP003 report, it is important to note:

- For FTE, only Regular (including sabbatical) and Overtime Earn Code values are included.
- The Job Codes planned in the 13 HCP Pooled Position types display a suffix, **JC** on this report.
- [By Agreement \(BYA/BYN\)](#) title codes are not included in this report because PPS does not store their hours or percent time worked.
- Retroactive pay actions are included and may inflate or understate the FTE data in a given accounting period.
- The HCP planned FTE for Forecast and Operating Budget are not displayed on this report as the HCP planned FTE values are mapped to the Planned Home DeptID (PHD) and not the distributed entity on which unit is paying. This limits the ability to compare the planned FTE values and the actual FTE included in this report.

Additional Resources

- Review the [CalPlanning Report Exercise Packet](#) for step-by-step instructions on how to run, export, save and print reports.
- Check out the [Roadmap of Campus Employee Data Systems & Reporting Tools](#) job aid on the CalPlanning website for a more graphical representation of connections among the various campus data systems and reporting tools that feature employee information.

Questions

For questions on CalPlan, CalRptg, HCP, HCP Rptg, and Smart View, contact the CSS Help Desk (available Mon-Fri 8am to 5pm PST):

- Call (510) 664-9000 option 1 (for IT), then 2 (for CalPlanning), or
- Email calplanhelp@berkeley.edu