

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

UC Berkeley												Page 1 of 1	
1_BEARS													
Job Code Trend by Actual Payroll \$ and FTE													
	2012-13		2013-14		2014-15		2015-16		2016-17		FY13-FY17 CAGR		
	\$	FTE	\$	FTE	\$	FTE	\$	FTE	\$	FTE	\$	FTE	
Ladder	20,440,557	126.17	21,771,059	129.84	22,938,862	130.63	25,086,499	133.11	24,955,662	129.77	5%	1%	
Lecturer-Security of Appt L2	180,146	1.79	97,080	1.00	106,680	1.00	108,276	1.00	225,358	2.00	6%	3%	
Agronomists	-	-	-	-	-	-	-	-	3,008	0.08	NA	NA	
<b>Regular Faculty</b>	<b>20,620,703</b>	<b>127.96</b>	<b>21,868,139</b>	<b>130.64</b>	<b>23,045,542</b>	<b>131.63</b>	<b>25,194,775</b>	<b>134.11</b>	<b>25,184,027</b>	<b>131.83</b>	<b>5%</b>	<b>1%</b>	
Emeriti Professors L2	6,500	-	6,000	-	6,000	-	5,250	-	-	-	NA	NA	
Faculty Emeriti	6,500	-	6,000	-	6,000	-	5,250	-	-	-	NA	NA	
Lecturer L2	602,935	9.75	623,182	9.74	987,044	15.06	968,728	13.99	910,479	12.88	11%	7%	
Visiting/Adjuncts	1,044,223	15.44	1,219,572	17.74	960,833	14.70	1,197,660	17.73	1,097,824	16.53	1%	2%	
Other (clinical, instructors)	20,559	0.17	30,731	0.33	62,914	0.34	44,381	0.35	35,981	0.32	15%	18%	
<b>Other Faculty</b>	<b>1,667,717</b>	<b>25.35</b>	<b>1,873,485</b>	<b>27.82</b>	<b>2,010,792</b>	<b>30.09</b>	<b>2,210,769</b>	<b>32.07</b>	<b>2,044,284</b>	<b>29.73</b>	<b>5%</b>	<b>4%</b>	
Researchers	4,263,638	50.63	3,692,349	44.35	3,408,679	38.22	3,887,485	44.57	3,440,152	36.25	(5%)	(8%)	
Post Docs	5,144,537	88.82	4,927,806	83.19	4,957,477	83.25	5,426,614	89.24	6,464,334	105.75	6%	4%	
Acad Administrators	591,432	4.95	677,253	5.90	868,323	7.54	869,028	6.89	753,061	5.72	6%	4%	
Other	252,397	0.15	667,407	0.42	1,210,121	2.38	1,183,379	0.99	900,811	0.93	37%	57%	
<b>Other Academic</b>	<b>10,252,005</b>	<b>144.55</b>	<b>9,964,816</b>	<b>133.85</b>	<b>10,444,601</b>	<b>131.40</b>	<b>11,366,506</b>	<b>141.69</b>	<b>11,558,358</b>	<b>148.66</b>	<b>3%</b>	<b>1%</b>	
Grad St. Instructor (GSI) L2	4,543,552	125.07	5,010,592	138.86	5,572,432	148.24	5,824,097	148.32	6,018,872	147.54	7%	4%	
Grad St. Researcher (GSR)	4,524,942	97.10	4,366,782	90.46	4,380,580	88.17	4,422,455	86.16	4,574,616	85.68	-	(3%)	
Reader/Tutor/Other L2	246,999	10.95	234,275	10.31	288,570	12.21	274,318	11.09	278,176	10.62	3%	(1%)	
<b>Grad Student Titles</b>	<b>9,315,493</b>	<b>234.01</b>	<b>9,611,659</b>	<b>239.63</b>	<b>10,241,582</b>	<b>248.62</b>	<b>10,520,871</b>	<b>245.57</b>	<b>10,871,664</b>	<b>243.84</b>	<b>4%</b>	<b>1%</b>	
<b>Academic Subtotal</b>	<b>41,862,418</b>	<b>531.87</b>	<b>43,324,100</b>	<b>531.94</b>	<b>45,748,516</b>	<b>541.73</b>	<b>49,298,171</b>	<b>553.44</b>	<b>49,658,333</b>	<b>554.07</b>	<b>4%</b>	<b>1%</b>	
Managers & Supervisors	1,040,427	11.01	1,134,362	11.07	1,067,459	10.04	1,145,204	10.55	1,240,155	11.06	4%	-	
Professionals	5,217,441	75.81	5,018,339	69.63	4,574,810	61.32	4,916,494	66.27	5,156,541	67.43	-	(3%)	
Operational & Technical	835,749	17.77	744,473	15.21	608,480	11.80	577,952	10.75	573,289	11.11	(9%)	(11%)	
N/A or Not Classified	1,066,453	15.93	971,973	14.14	798,442	10.97	830,474	11.48	894,797	12.09	(4%)	(7%)	
<b>Staff</b>	<b>8,160,070</b>	<b>120.52</b>	<b>7,869,147</b>	<b>110.05</b>	<b>7,049,190</b>	<b>94.12</b>	<b>7,470,124</b>	<b>99.05</b>	<b>7,864,782</b>	<b>101.70</b>	<b>(1%)</b>	<b>(4%)</b>	
Student Titles	318,505	11.62	276,700	10.13	291,666	10.61	252,025	8.95	312,023	10.28	(1%)	(3%)	
Unknown Jobs & BFS Journals	30,763	0.02	313,443	0.06	59,987	-	81,687	-	141,113	-	46%	NA	

CAGR (compound annual growth rate) calculates the constant rate of growth from the end of the first year shown through the end of the last year shown, as if the growth had been constant at the same rate every year.

POV  
 Scenario: Actual, Version: Final, Entity: 1\_BEARS, Fund: Fund, 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:                       
 Run Time: 11:00 AM

## How to Use HCP003

Use the HCP003 to compare the 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 FY13-17. 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.

### 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:  $[(\text{FTE in FY17} / \text{FTE in FY13})^{1 / \text{number of periods}}] - 1$ . This report includes a 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 12 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.

### Additional Resources

- Check out the [CalPlanning Reporting training web page](#) for the latest version of 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, HCPRptg, 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](mailto:calplanhelp@berkeley.edu)