

**Winter 2024 General Duties and Responsibilities Statement(GDRS)  
Graduate Employees (GE)  
Office of Student Financial Aid and Scholarship (OASFAS)  
Financial Wellness**

TABLE OF CONTENTS

|      |   |    |
|------|---|----|
| 1.0  | General Information .....                                 | 1  |
| 2.0  | Availability of Graduate Employee Appointments (GEs)..... | 2  |
| 3.0  | Application Process and Eligibility Requirements.....     | 2  |
| 4.0  | Appointment and Reappointment Process .....               | 3  |
| 5.0  | Workload and Work Assignments .....                       | 4  |
| 6.0  | Health and Safety.....                                    | 7  |
| 7.0  | Satisfactory Progress toward Graduate Degree .....        | 8  |
| 8.0  | Discrimination Grievance Procedures .....                 | 9  |
| 9.0  | Work Environment.....                                     | 9  |
| 10.0 | Absences .....  | 10 |

**1.0 GENERAL INFORMATION**

**About This Document**

The purpose of this GDRS is to clarify information concerning Graduate Employee positions (GEs) offered by this GE hiring unit. The relationship between GEs and the University as a whole is governed by the Collective Bargaining Agreement (CBA) between the University of Oregon and the Graduate Teaching Fellows Federation. This GDRS details the specific relationship between GEs and this GE hiring unit.

This document does not apply to work-study, hourly student employees or other staff hired in this GE hiring unit.

The revision date of this GDRS November 15th, 2023. This GDRS is valid January 16, 2024 – March 15, 2024. The individuals charged with overseeing implementation of the processes outlined in this GDRS are:

- James Brooks, Senior Associate Vice President and Director of Financial Aid, Student Services and Enrollment Management [brookjs@uoregon.edu](mailto:brookjs@uoregon.edu)
- Gilbert Rogers, Senior Assistant Director for Financial Wellness [grogers7@uoregon.edu](mailto:grogers7@uoregon.edu)

## **2.0 AVAILABILITY OF GRADUATE EMPLOYEE APPOINTMENTS (GES)**

The availability of GE appointments in the Financial Wellness Center (FWC) in the Office of Student Financial Aid and Scholarships are determined by and based on the administrative needs of the Financial Wellness Center and the FWC Director. The number of GE positions available is subject to the budgetary constraints on the GE employing unit and the University.

In this GE employing unit, GE positions are typically limited to administrative positions. Appointments are typically available during the academic year only (Fall, Winter, and Spring Terms). This unit does not typically offer Summer Term GE appointments.

## **3.0 APPLICATION PROCESS AND ELIGIBILITY REQUIREMENTS**

### **Application Process for all Terms (Including Summer)**

The Financial Wellness Center announces the majority of their open GE positions in early February on the Financial Wellness [website](#). Announcements, position descriptions, required application materials, and application instructions can be found on the Financial Wellness website: <https://financialwellness.uoregon.edu/>.

Announcements are posted for a minimum of 10 business days. Students are encouraged to submit applications within 10 days of the announcement being posted. Occasionally, positions within the Office of the Dean often are identified and posted outside of the normal appointment cycle.

For all GE positions in the Financial Wellness Center, eligible students are those who:

- Have been admitted to a degree-granting graduate program at the University of Oregon, and
- Are maintaining satisfactory progress toward their degree,
  - According to the Division of Division of Graduate Studies, and
  - According to criteria established by that GE's graduate degree program

Students will be considered in the following order:

- A number of positions are reserved for incoming doctoral students in order to recruit students with exceptional capabilities and perspectives
- Additional specific qualifications as cited in the individual GE position postings

The Division of Division of Graduate Studies requires that students be enrolled for and successfully complete a minimum of 9 graduate credit hours towards the degree during each term of a GE appointment and be making satisfactory progress toward their degree in order to be eligible for a GE appointment (see Section 7).

#### 4.0 APPOINTMENT AND REAPPOINTMENT PROCESS

In accordance with the CBA, this GE employing unit has a standing committee of at least three members, including (1) the Director of the Financial Wellness Center and 2 staff or faculty members to be selected at the time of the application process. The Director of the Financial Wellness Center may appoint additional members to the committee, or delegate participation to other individuals.

Appointments and reappointments will be based on evaluation of each candidate's qualifications with respect to eligibility criteria, as well as:

**(A) General criteria include (in no particular order)**

- **Academic Credentials.** For incoming students, this is evidenced by previous degrees and grades, test scores, etc. Making satisfactory progress toward the degree is an eligibility criterion, not a criterion on which rank in the applicant pool is determined.
- **Recommendations from academic or work supervisors.** Consideration will be given for a positive working arrangement between a GE and the supervisor person with whom the GE will work. While appointment or reappointment criteria may include the recommendation of the person who will act as the GE's supervisor, the committee must give substantial consideration to the other appointment or reappointment criteria.
- **Previous experience.** For non-teaching GE positions, previous employment or other experience relevant to the GE position available.
- **Interviews.** In the event that the hiring committee interviews GE applicants, finalists will be interviewed and evaluated based on their performance and responses.

**(B) Assignment Type-Related Criteria**

- For **Administrative GEs** - Preference shall be given to those who have specific training and/or experience to perform the position duties and responsibilities. See position announcements for details, but these may include:
  - Record of academic excellence and/or important experience in Financial Education or counseling
  - Ability to work under supervision and independently, especially as evidenced by success in independent research or work projects
- See each position announcement for details, but criteria may include, but not be limited to:
  - previous experience
  - strong verbal and written communication skills
  - additional qualifications as cited in the individual GE position postings

Candidates will be rank-ordered based upon, first, the eligibility criteria in Section 3, and subsequently, the general, assignment type-related, and specific criteria referred to above.

### **Time Limits for Position Appointments and Reappointments**

- GEs will be appointed year-to-year rather than term-to-term, whenever feasible. GEs are not employed term-by-term in order to determine whether they are adequately qualified for a GE position.
- Reappointments are not automatic, nor are they guaranteed.
- In the case of the continuation of a GE, the unit may opt to reappoint the same student to a particular GE position without any new announcement of the position.
- GE positions may be held by the same student for a maximum of 4 consecutive years. Departments may choose to allow a GE to continue with the position beyond 4 years if there is no other qualifying student.

### **No Qualified Applicants for a Position and Emergency Appointments**

If no qualified students apply or are available for a particular position, the selection committee or department head may decide to reopen the application process for the position. Generally, the same application process described in Section 3 and appointment/reappointment process described here will be repeated. However, the department reserves the right to proceed to fill the position as it would an emergency appointment. In such cases, the GE hiring committee will select amongst available and qualified applicants from current pool(s). If a successful applicant is not found, the Department Head or Committee may decide to reopen the application process for the position.

### **GE Performance Evaluation**

Evaluations are performed by the GE's supervisor at the end of the GE appointment for GEs appointed fall, winter and spring.

## **5.0 WORKLOAD AND WORK ASSIGNMENTS**

Workload includes performance of all duties of the work assignment. The workload for an administrative GE assignment would include duties listed in the position description. In setting the workload (and thus FTE) for a particular GE position, GE employing units consider what constitutes a workload sufficient to perform the work assignment satisfactorily.

The distribution of time actually spent on duties may vary from week to week, but the workload per term should be within the maximum total work hours. GEs are encouraged to track how they spend their work time and to contact their supervisors early in the term if it seems as if they will not be able to stay within the maximum work hours for the term.

GEs are most commonly appointed at the following FTE levels and corresponding total maximum work hours:

| <b>FTE</b> | <b>Maximum Work Hours per Term</b> | <b>Average Hours per Week (based on 11-wk term)</b> | <b>Maximum Work Hours per Academic Year</b> |
|------------|------------------------------------|---|---|
| .20        | 88                                 | 8   | 264   |
| .25        | 110                                | 10  | 330   |
| .30        | 131                                | 12  | 393   |
| .35        | 153                                | 14  | 459   |
| .40        | 175                                | 16  | 525   |
| .45        | 197                                | 18  | 591   |
| .49        | 215                                | 19  | 645   |

NOTE: Where the workload is broken down by work assignment duties and is designated as a “minimum” number of hours, the GE is required to fulfill that specific time commitment.

In this GE employing unit, typical duties for the following types of GE work assignments are as follows:

**Administrative GE**

Specific duties will vary from week to week. The GE will be responsible for time management, and will communicate regularly with their supervisor for guidance in prioritizing tasks from week to week. Specific responsibilities for each position include:

**Graduate Employee – Financial Wellness Center + Peer Financial Coach**

- Meet with students who access the Financial Wellness Center, including providing intake, listening to students’ needs, and assigning the student to a peer financial coach.
- Track and monitor student visits to the Financial Wellness Center, including the reasons for the visit and analyzing any trends.
- Serve as a peer financial coach to students, including meeting with the student to go through the coaching process and providing financial literacy and credit education, and scheduling follow-up as needed. Peer financial coaches typically provide options for budgeting, including Mint, Excel, GoogleSheets, and Groove.
- Update resources that are used in financial coaching.
- Create and maintain a centralized database for resources and training materials.
- Facilitate workshops and training opportunities for the peer financial coaches.
- Oversee the approximately 14 other peer financial coaches including monthly wellness check-ins with them
- Focus on building relationships with units across campus to increase student referrals to the Financial Wellness Center.

- GE will be trained in Groove and will provide regular feedback, at least quarterly, to the Senior Assistant Director of the Financial Wellness Center on any concerns or opportunities for improvement related to the platform (more content in different areas, better UX/UI, etc).
- Plan, implement, and participate in Financial Wellness Center programming over the course of the academic year.

Administrative GEs are paid on a salary basis and will be required to track their time on the timesheet provided by their supervisor. Administrative GEs understand that except as otherwise required by law, the university will pay them a fixed salary every month regardless of the number of hours actually worked that month.

### **Training**

GEs are encouraged to pursue up to six (6) hours of training per academic year through university or department approved programs and other workshops and trainings related to successful performance of GE duties.

GEs may be compensated for these training hours by accounting for the hours within their regular work assignment if job training hours at approved programs are specified in the workload allocation form, a relevant and specific job description in the department GDRS, or documented list of individual training courses and/or activities for that GE.

GEs interested in attending trainings should work with their supervisor to ensure minimal disruption to work assignments.

## 6.0 HEALTH AND SAFETY

### Accident Reporting and Workers' Compensation

The University's Workers' Compensation Program is administered by Safety and Risk Services. If you have any questions about the program, please call 541-345-8316.

All University of Oregon employees, including GEs, are covered by workers' compensation insurance through SAIF Corporation. This coverage is for occupational injuries, illnesses or diseases that arise out of or in the course and scope of employment.

The University has established procedures for reporting accidents and filing workers' compensation claims. They are intended to expedite claims processing and to minimize the possibility of delays in payment of benefits. If a GE is injured on the job, the GE must report it immediately to the supervisor. The supervisor will complete the Workplace Injury Report with the GE. If, as a result of the accident, the GE requires medical care, a Workers' Compensation Claim Form (801) must be completed within 24 hours. If, due to the nature of the injury or illness, the GE is unable to complete the 801, the supervisor will submit it on behalf of the GE. Workers' compensation information and forms are available at <https://safety.uoregon.edu/injury-reporting-and-workers-compensation>.

Oregon laws prohibit discrimination or retaliation by an employer against an employee for filing a workers' compensation claim or a safety-related complaint with OSHA (Occupational Safety and Health Administration).

In addition to medical expenses related to the injury or illness, benefits provided by SAIF Corporation may also include temporary total disability payments if the GE is unable to work as authorized by an attending physician. The GE will be notified by SAIF Corporation of the rights and coverage when the claim is processed.

An injured GE who is unable to work may not receive both salary compensation from workers' compensation and sick leave or other pay when this results in the GE receiving more than their regular monthly salary. Should this occur and payment is received from both sources, the GE must be prepared to repay any over-payments. If the GE believes there is some confusion about salary or workers' compensation benefits, contact Safety and Risk Services immediately.

ORS 659A.043 – 659A.052 describe reinstatement or reemployment rights for employees who have sustained a compensable occupational injury or illness.

### Safety Information

The University of Oregon Safety Policy may be found in the library, <http://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-5-public-safety/safety-physical-space-and-environment>. The Office of Environmental Health and Safety (EHS) is responsible for the University's safety programs. For questions or information regarding any of these programs, contact EHS at 541-346-3192 or visit their website,

<https://safety.uoregon.edu/environmental-health-and-safety>. Safety concerns may also be submitted via an online reporting system on the Safety Advisory Committee website, <https://safety.uoregon.edu/content/safety-advisory-committee>.

### **Reporting Safety Hazards**

GEs who identify safety hazards and issues are encouraged to discuss them immediately with their supervisor. The following unit representative may also be contacted: Gilbert Rogers FWC Director, [grogers7@uoregon.edu](mailto:grogers7@uoregon.edu), 541-346-9252.

Other resources on campus to report such information include the Office of Environmental Health and Safety, a Safety Advisory Committee representative or a GEF union representative. Off-campus resources include the local OSHA office and the Bureau of Labor and Industries (BOLI).

### **Location of Emergency Procedures, Evacuation Plans, and First Aid Supplies:**

Global Scholars Hall Service Center: First aid supplies are located in the cabinet next to the front desk of the service center. Evacuation plans and emergency procedures are posted on the wall in the main office behind the front desk and are available at the front desk.

## **7.0 SATISFACTORY PROGRESS TOWARD GRADUATE DEGREE**

### **Satisfactory Progress for all UO Graduate Students**

Requirements for being in good standing and maintaining satisfactory academic progress with the UO Graduate School include, but are not limited to, complying with the Student Conduct Code, continuous enrollment, appropriate course load, grades and time limit. Details are found on the Division of Division of Graduate Studies website: <http://gradschool.uoregon.edu/policies-procedures/satisfactory-progress>. Each GE employing unit is responsible for verifying that the GE is making satisfactory progress toward their degree, whether or not the hiring unit is also the GE's graduate degree program.

The criteria used to assess satisfactory progress toward a graduate degree is the same for all graduate students in a particular graduate degree program, whether or not they hold a GE position. Failure to make satisfactory progress will result in disqualification from consideration for a GE position. The students' academic progress will be evaluated each round of applications per the criteria listed above.

During the academic year, the Division of Division of Graduate Studies reviews academic transcripts of all graduate students holding GE appointments. the Division of Division of Graduate Studies will notify a GE's graduate degree program if the GE's academic performance during the appointment period falls below the

Graduate School's 3.0 GPA standard. The degree program will be asked to review the student's progress toward their graduate degree and issue its approval before a GE reappointment can be made to that student.

GEs that are students outside of the department will be evaluated based on criteria used by the program for which they are currently enrolled.

## **8.0 DISCRIMINATION GRIEVANCE PROCEDURES**

To file an employment-related discrimination grievance, GEs are encouraged to contact the Graduate Teaching Fellows Federation. For discrimination grievances that pertain to a GE's role as a student, graduate students should refer to the Office of Investigations and Civil Rights Compliance reporting procedures online at <https://investigations.uoregon.edu/how-report>.

## **9.0 WORK ENVIRONMENT**

This section provides information about GE facilities and services described in the GTTF Collective Bargaining Agreement. Information detailing this unit's GE work environment (e.g., workspace, conference room space, tutoring space, phones, computers, office supplies, etc.) will be provided by the GE's supervisor. Adequate space will be provided for conducting administrative tasks associated with the GE assignments. Access to resources will be determined by, and appropriate to, the GE position and responsibilities. Supplies shall be available during standard working hours.

### **Workspace**

All locks and doors, furnishings, partitions, and other workspace materials are maintained by the OASFAS Administrative Team.

### **Private Meeting Space**

The Financial Wellness Center GEs will have access to space in Oregon Hall for private meetings related to interviewing and other assignments.

### **Access to Telephones and Computers**

Upon request, GEs will be provided easy and reasonable access to a telephone and to computers equipped with software typically provided other departmental staff and as it relates to GE assignments, during standard working hours (Monday – Friday, 8 am – 5 pm).

### **Access to Office Supplies, Photocopies and Printouts**

GEs shall have access to supplies necessary to accomplish the tasks associated with their assignments as directed by their supervisors. Office supplies, photocopiers, printers, fax machine are available to the GE for Communications business use at no personal cost to the GE. These are available during standard working hours (Monday – Friday, 8 am – 5 pm).

## **10.0 ABSENCES**

### **Financial Wellness GE absence policy**

If a GE is unable to attend work at the scheduled time, they must notify Dr. Gilbert Rogers Director of Financial Wellness, as early as possible and before any assigned duties are scheduled to occur.

If in the case that a GE is unable to directly notify the department, they may designate someone to make their notification and provide the necessary information to Jim Brooks, OASFAS Director, [brooksja@uoregon.edu](mailto:brooksja@uoregon.edu).

### **Make-up work**

Generally, for duties missed, GE's must check in with their supervisor to determine when and how the missed work will be made up.

### **Planned absences**

If a GE is planning an approved absence during any working days of the term, they must notify their supervisor directly.

### **Reporting Sick Leave**

When a GE is absent for a work assignment, regardless of the length of absence that day, they will be charged a day of sick leave.

To record and report sick leave, GEs will use the GE Monthly Time sheet provided in the UKG time management system administered by the OASFAS Administrative Team. The time sheet should be completed whenever sick leave is used, submitted by the GE, approved by the supervisor, and completed by the appropriate time reporting date usually the 16th of each month.

**Additional Information**

More information about GE absences - including those related to the birth or placement of a child, a serious health condition, or the care of a partner, child, or parent for a serious health condition - can be found on UO HR's website: <https://hr.uoregon.edu/graduate-employee-family-and-medical-leave>.