Oregon State University
College of Forestry

STANDARD OPERATING PROCEDURES
Revision date: 10/2024

These policies and procedures may be updated as business processes change. The date of the latest version of each section is noted below.

Contents

Communications Allowance

With supervisor approval and according to OSU policy, employees can request monthly cell phone allowance. College policy is that we only provide an allowance at the low rate ($25 month) unless justification is approved by the Dean's Office.

Computing Services Eligibility

Approved by Dean DeLuca, June 30, 2023

The College of Forestry offers a suite of computing-related services through the Forestry Computing Resources Group (FCR) that support the research, teaching, outreach and service missions of the College, its constituent units and partner state and federal agencies.

Eligibility

FCR adds services to existing ONID accounts. Eligibility for ONID accounts is managed at the University level and information can be found at https://onid.oregonstate.edu. Access to college computing support services is available to members of the College of Forestry and partner state and federal agencies (Oregon Department of Fish & Wildlife and USFS Forestry Sciences Lab). Members of these communities may request access to college computing support services for collaborators. These collaborators may or may not qualify for an ONID account and so local accounts can be created which limits access to college computing resources only.

All users will adhere to OSU's Acceptable Use of Computing Resources policy found at https://policy.oregonstate.edu/UPSM/08-005_acceptable_use_computing_resources

Services and Fees

FCR maintains a list of services and their respective fees on their website. http://helpdesk.forestry.oregonstate.edu/service-descriptions-and-fees

Financial Responsibility

The costs of providing basic and extended computer support services are recovered through fees charged through the Quantitative Sciences Group Service Center. All fees are established based on actual or anticipated expenses and are charged equitably to all eligible members. Each responsible party will identify or affirm their authorized users of support services on a quarterly basis as bills are received. Each unit will review the quarterly QSG bill and submit changes in writing to QSG.

Financial Support

"Full Dean Support" is defined as the Dean/College paying the fully supported user fee associated with a particular user. Positions designated for Full Dean Support are as follows:

All professorial faculty, instructors, professional faculty, classified staff, and other personnel supported in the College Annual Essential Expenses Budget and having an appointment level of 0.5 FTE or greater, who are paid by an index with College of Forestry organizational code, and who are housed in CoF facilities.

Extension faculty who are housed on-campus and with tenure home and principal assignment in the College of Forestry receive Full Dean Support. Off-campus Extension faculty normally have their computer support provided by OSU-ES.
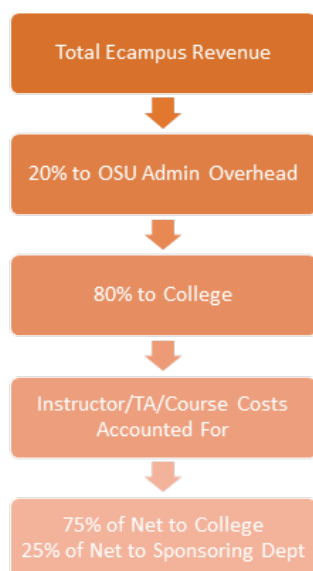
Emeritus professorial faculty receive Full Dean Support upon annual verification of need and activity status by department head.

Graduate students who meet the University's continuous enrollment requirement or who are within two months after defending their thesis/dissertation.

Undergraduate student employees who work in an administrative unit or department office.

Ecampus Returns to Departments

Ecampus revenue is distributed to the College as noted in the OSU budget model; 80% of the revenue comes back to the college and OSU keeps 20% for admin overhead. The diagram below represents the college-level distribution:

Total Ecampus Revenue

20% to OSU Admin Overhead

80% to College

Instructor/TA/Course Costs Accounted For

75% of Net to College
25% of Net to Sponsoring Dept

Emeritus Rights

[OSU Academic Faculty Manual](#) describes the process for Emeritus recognition. Once awarded, Emerit/Emerita/Emeritus faculty have the benefits afforded to them by the University.

Forestry Executive Committee

The Forestry Executive Committee (FEC) and its precursors have been functional in the College of Forestry for several decades. The mission of the FEC is to serve as an advisory board to the Dean of the College of Forestry, who has executive decision-making powers. The Dean recognizes the importance of faculty, administrative, and graduate student input to the decision-making process, and feels that better decisions come when all viewpoints are considered. The FEC is NOT a decision-making body, rather, it exists to *inform* decisions made by the Dean.

Accordingly, the mission of the FEC is to provide the Dean of the College of Forestry with the following:

a. diverse perspectives on the administration and management of the College;
b. a conduit outward to faculty, students, and staff regarding the administration of the College; and
c. connection to the active committees of the College.

Composition

The FEC is composed of the following administrative and faculty members: Dean, Special Assistant to the Dean, Associate Deans, Department Heads, Directors, faculty representatives (one per Department), and a representative of the Graduate Student Council; the Dean may appoint additional representatives.

Faculty representatives serve two-year terms, must have achieved tenure status, and are selected voluntarily by their Department Heads, with the approval of the Dean. Faculty representatives should represent the range of diversity in the College (age, gender, ethnicity, academic expertise, etc.). Faculty representatives also serve as direct links between the College Administration and the faculty, staff, and students in their departments. They are asked to report information from FEC back to departmental meetings and bring topics from the Departments to the FEC for consideration and/or discussion to promote awareness among the leadership team of the College.

Graduate Student Appointment & TA Allocation Policy

The College provides tuition remission to eligible graduate students based on CoF; Oregon State University (OSU); OSU Human Resources (HR) and Graduate School policies; and the Coalition of Graduate Employees (CGE) Bargaining Agreement. ***The CGE contract takes precedence over all other published information.***

Eligible graduate students may hold one of two types of appointments:

- **Graduate Teaching Assistants (TA)** provide instructional support through leading lecture, lab, or recitation sections; grading; preparation of materials; or other activities directly related to the educational mission of the unit.
- **Graduate Research Assistants (RA)** support field, laboratory, or research work appropriate to the discipline supporting the unit's mission.

To be eligible for appointment within the College of Forestry, the following criteria must be met:

- Appointee must be a graduate student with a Major/Minor concentration in one of CoF degree programs. Department Head (DH) may approve any exceptions; exceptions can be approved based on the following criteria:
    - A financial plan must be established, noting how the department or faculty will cover tuition expenses.
    - A student is enrolled in a program that does not have an academic home, is an interdisciplinary program, or has a CoF Faculty as Major Professor (MP).
- Appointee must be a graduate student enrolled as a full-time degree-seeking graduate student, enrolled in a minimum of 12 credits each term (or 3 credits during summer session); enrollment at any OSU campus/e-campus is allowable.
    - *Audit registrations, course withdrawals, and enrollment in INTO OSU may not be used to satisfy these minimum enrollment requirements. Tuition remission may not be applied to INTO-OSU tuition charges.*
- An appointment must be a minimum of 0.40 FTE to be eligible for tuition remission ([we defer to OSU rules for minimum appointment levels](#)). Note that CoF will not remiss tuition charged to SPAs.
- Prior approval from the MP and the DH is required for the appointment of a graduate student who is enrolled in more than 3 credits during summer session.
- For dual-enrolled students, differential tuition is charged at the highest tuition rate. Prior DH approval must be given for such appointments, and a financial plan must be established noting how the department or faculty will cover tuition expenses.

Allocation of TA's is as follows:

- Up to 0.40 FTE per lab section (enrollment caps ~ 25 per field lab and 28 per computer lab).
- Grading support of 0.40 FTE for lecture sections of classes with labs with enrollment ≥ 40.
- Grading support for large *lecture-only* classes or 0.40 FTE for enrollment of 40-64, 0.49 FTE for 65-79, 0.60 FTE for 80-129, 0.98 FTE for ≥ 130.

Special Considerations:
- It is acceptable to appoint one TA at 0.49 FTE rather than 2 TAs at 0.40 FTE if the workload justifies such an appointment.
- Supervised course delivery for an Ecampus course requires an appointment *of* 0.49 FTE.

Hosting and Event Costs

Meal and beverage costs for college-sponsored activities must follow OSU guidelines for reimbursement. Organizers and hosts should plan for meals that fall within the approved per diem rates; rates can be found by searching the appropriate location: https://www.gsa.gov/travel/plan-book/per-diem-rates. These are per person.

Gratuities and tips may be included up to 20% or the service charge added by an establishment for larger parties. Activities including alcohol must be billed separately and charged to a Foundation account.

All Receipts must show an itemized listing of what was purchased. Each reimbursement request must include the 5 W's:
- Who: Names and OSU IDs of all employee attendees; names & and associations of all non-OSU employed attendees.
- What: What is the name or reason for the event
- When: Date of the event
- Why: How does this event benefit the University/CoF in its mission; how does it relate to the grant (if applicable).
- Where: Location of the event

For employee recruitment hosting and College Signature Events (such as the Dean's Dinner, Board of Visitors, or other event as noted by the Director of Alumni Relations & Events), the per diem is approved at the following rates (which includes beverages):
- Breakfast: $20/per person
- Lunch: $30/per person
- Dinner: $60/per person

Should an organizer wish to request an exception to the policy, they must complete the pre-approval form and email it to the Budget Director prior to the event; details must be provided to justify why the event cannot be hosted under the established guidelines for per diem. The Budget Director will then approve or disapprove the request. Any requests submitted after an event has taken place will be denied.

Employee recognition events, such as retirement events, must follow the OSU Foundation *Guidelines for Use of Unrestricted Funds*. Organizers are responsible for understanding and applying these policies and should identify a Foundation Fund to charge these expenses:

Non-Cash Parting/Retirement Gifts - Employee Retirement or Separation from Service

Non-cash gifts less than $400, given at retirement or separation from service, are reimbursable. All cash and cash equivalent gifts, or non-cash gifts greater than or equal to $400, are only reimbursable through the FS Index Reimbursement System. Gifts or awards cannot be given retroactively to employees no longer employed at OSU. Amounts over and above the recommended guidelines are reimbursable with the written approval of the dean, Provost, or in non-academic units, the VP or department head. *Note, the Dean of Forestry will not approve amounts over these guidelines*

Recommended Guidelines:
1. Reimbursement up to $50 for five (5) to fourteen (14) years of service
2. Reimbursement up to $175 for fifteen (15) to twenty-four (24) years of service
3. Reimbursement up to $250 for fifteen (25) to twenty-nine (29) years of service
4. Reimbursement up to $400 for 30 or more years of service

Insurance Deductibles

The University deductible for most claims is $5,000. When a deductible is charged, the department/unit will be responsible for the payment. Note that deductibles may not be charged to grants.

Personal Clothing Purchases

Generally, personal clothing is not an allowable direct or reimbursable expense. For employees with access to Foundation accounts that provide personal clothing purchase, the college allows up to $100 annually for the purchase of OSU-logo clothing to engage in public relations activities; purchases must meet the stipulations in the [Public Relations/Fund Raising policy](#) (code 28613).

Regarding our Safety Footwear Program for employees, see [the section below](#).

Promotion & Tenure

See separate document for [College-level guidelines](#) that supplement [OSU guidelines](#). Faculty who serve on the College-level P&T Committee should not vote in their department and should reserve their vote for the College-level process. Each department has its processes and timeline for dossier review; refer to the department head and administrative manager for details.

Purchasing/Travel Credit Cards; Travel & Related Expenses

Who is eligible: OSU purchasing and travel cards are primarily for staff and faculty use. By exception, a student may be approved to receive a purchasing/travel card if their regular duties are such that it is warranted; the supervisor must approve a request for such an exception, the department manager/administrator, and the department head (or the Budget Director if the student is in a dean's unit).

Pre-approval for travel required: Pre-Trip Registration is required within Concur for all out of state and international travel, excluding one day trips. Pre-approval travel does not imply approval of estimated travel costs and does not imply funding is available; all travelers should discuss funding limits with budget authority prior to arranging travel.

Lodging Rates, Per Diem Rates, and Meals: reference the [GSA rates](#) for specific domestic locations; reference [Department of State Allowances](#) for international locations. These rates should be followed as closely as possible when booking hotels; an exception is made when travelers stay at hotels sponsored by the conference they are attending. Per diem for meals is calculated in Concur when claiming a travel allowance; travelers are required to use per diem/meal allowance rates

rather than actual cost. The only time actual cost will be reimbursed is when an individual employee hosting preapproved groups who are <u>not in travel status.</u>

Meals while not in travel status (such as meals in Corvallis/Albany area) are not reimbursable unless associated with an approved hosting activity. Employees who choose to meet with collaborators or each other over a meal are not eligible for reimbursement of meals.

Transportation: travelers using their personal vehicle must claim Personal Vehicle Mileage; gas can only be charged or reimbursed when using rental vehicles. Travelers can choose to drive instead of fly to their destination; however, if driving is more expensive than flying, reimbursement will be limited to the cost of an equivalent flight.

Receipts & Business Purpose: all Concur reports must include receipts for each expense, in addition to the automatically imported receipt; these can be paid invoices, scanned physical receipts, PDFs of emailed receipts, screenshots, or some other form of itemized receipt. All expenses must include a stated business purpose noted in the comment field; this should include details such as what the purchase will be used for and by whom. Receipts and business purpose are required to provide approvers with as much detailed information as possible to ensure the expense is charged to the correct account code and funding index.

Additional OSU policies can be found in [Rule 03-140-401](#); please also reference [Process Documents and Tip Sheets](#).

Research Cooperatives

Approved by Dean DeLuca, June 30, 2023

Purpose:

Research Cooperatives (co-ops) are important components of the College of Forestry's (CoF) research and academic missions. They are important touchpoints between academics, industries, and agencies. Standardizing the relationship and expectations between CoF and the co-ops is critical to maintaining successful co-ops within the college.

CoF Administration Responsibilities:

1. The college will pay 0.25FTE (or 2.5 months of summer salary) of the director's salary to administer the co-op if the following conditions are met:
    1.1. Maintain annual income above $100,000, where income is the sum of all dues and other support directly funding the co-op (e.g., Oregon Legislative funding etc.), and
    1.2. Director is a tenure track faculty member on a 9-month (1.0FTE) or 12-month (0.75FTE) position.
    1.3. The income threshold will be reviewed every 3 years and adjustments may be made if there are significant changes to costs of faculty, personnel, and administration.
    1.4. Co-ops that fall below this threshold will be allowed one academic year to increase their income, or transition to other sources of funding for summer/supplemental support, before salary support is withdrawn.
2. A designee from Dean's Staff appointed by the Dean will organize an annual meeting of co-op directors to discuss College support, co-op research updates, and co-op administration.
3. CoF will continue to advocate to retain the 17.5% indirect cost rate with OSRAA.
4. CoF will provide the following administrative services:
    4.1. Assist co-op directors with tasks such as routing MOUs, keeping official records, tracking exceptions to terms and conditions, and billing.

4.2. Work with co-op directors to maintain current MOU templates for each co-op.

4.3. Send annual requests to co-op directors to update co-op membership list for all CoF co-ops.

4.4. Provide co-op directors a standardized accounting report of co-op financials including college contributions, outstanding dues/invoices, etc.

4.5. Document college contribution to the co-ops using activity codes.

4.6. Work to create an alternative to MOUs for members with small donations or short time horizons. *This may be accomplished through a "Friend of the Co-Op" type system through the OSU Foundation or Ag Research Foundation.*

4.7. Develop an administrative manual for co-ops that includes:

    4.7.1. Billing process

    4.7.2. Collections for unpaid invoices

    4.7.3. MOU routing process

    4.7.4. Admission of new member to existing co-op

    4.7.5. Termination of co-op member

    4.7.6. How to start a new co-op, including that:

- It must be discussed with the Associate Dean for Research and approved by the Dean before initiation.
- It cannot be in competition with other CoF co-ops.
- There are a guaranteed number of members with base dues that amount to a healthy sum over a multi-year period that allow for productive and efficient effort; ideally aiming to generate the minimum annual income noted in 1.1 above.
- How to move a co-op from another university to OSU.

5. CoF will recognize co-ops and members at College functions (e.g., banner and/or booth at Career Day).

Co-op and Co-op Director Responsibilities:

1. Provide annual program reports to the Dean and Associate Dean for Research that includes member and publications data. Reports and other presentations delivered to cooperators at official co-op meetings will be acceptable.

2. Provide annual budget reports to the CoF Budget Director. Format and data will be determined in collaboration between cooperative staff and Budget Director.

3. Engage faculty in co-op operations, such as periodic co-op centered research symposium(s), presentations, etc.

4. Leverage co-op funds to secure additional sponsored research funding.

5. Respond to requests from FSS and update co-op membership and dues changes in a timely manner.

6. Provide full cooperator contact information to the Budget Director and/or Financial Strategic Services Office (FSS).

Administration Process for Cooperator MOUs:

1. Co-op Director will work with CoF Budget Director to draft the MOU before circulating to potential members.

2. Co-op Director may route draft MOUs for initial review to potential cooperators, provided the Budget Director is copied on all emails. All drafts should be watermarked "draft" and not signed. Budget Director must ensure that terms and conditions are removed/added/revised that negatively impact operations.

3. Budget Director or FSS will route finalized MOU to cooperator and Associate Dean for Research for signatures via DocuSign.

4. FSS will create or update vendor record in Access database.

5. FSS will forward MOU to OSRAA for signature with a cc: to the co-op director.
6. Once signed by OSRAA, FSS will send fully executed MOU to agency, co-op director, budget director, and department manager.
7. FSS will maintain final MOU record in FSS files and ensure it is uploaded to OnBase by OSRAA.
8. FSS will send invoices (copying co-op director) based on invoicing schedule noted in the MOU and will coordinate with the co-op director for prorated amounts or when there is a calculation needed. FSS shall contact directors for any changes in membership/dues structure, etc. prior to creating invoices.

Safety Footwear Program

OSU Environmental Health & Safety guidelines note that safety footwear may be purchased by the department for an employee (not a student) if safety footwear is determined to be a requirement for work purposes. Please see EH&S guidelines and the Safety Shoe Request & Authorization Form. Supervisors should confer with the Budget Director to ensure a proper funding source is identified and that proper purchasing channels are followed.

Salary Increase Requests

Approved by Dean DeLuca, June 30, 2023

Salary increase requests for all positions require approval of the Dean or designee. Increases may not be requested for merit or excellent work performance; merit increases are provided annually as directed by the Provost. If you have questions on the process or would like to discuss specific cases, contact the Director of Administration and Operations in the Dean's Office.

Increases can be requested to address the following:

1. **Internal Equity** – when the salary of an employee is lower than a comparator at OSU, or set of comparators, in the same classification with similar experience and education. Include a list of comparators in your rationale.
2. **External Market Adjustment** – when the salary of an employee can be documented as being lower than comparator positions outside of OSU. Include a market study in your rationale; also address whether this salary increase would introduce any internal inequities and if so, how those will be resolved. **Note**: If the increase creates an outlier, the adjusted salary cannot be used as an internal comparator and basis for internal equity adjustments for other positions.
3. **Retention** – when an employee is actively being recruited or is a finalist for employment opportunities outside of the unit. Include specific information about the offer and where the employee is in the recruitment process in your rationale. If there is an offer letter, include it in the documentation.

To request an increase: supervisors residing in a department should work with their department administrator/manager to submit the information required; supervisors in a dean's unit can confer with the Director of Administration and Operations before submitting the form below.

1. Complete the Salary Increase Request Form
2. Attach supporting documentation:
    a. A clear and compelling rationale for the increase that addresses the issues noted in above categories.
    b. A current organizational chart.
    c. The last performance evaluation of the employee in question.
3. Upload to DocuSign and route for signature to:

a. Supervisor
b. Unit Lead or Department Head
c. Director of Administration and Operations
4. If approved, send the packet to HR for review: position.descriptions@oregonstate.edu.
5. HR may ask additional questions and will make the final determination on approval. No guarantees should be made to employee about a potential salary increase until HR has approved.

Scheduling Rooms
Approved by Dean DeLuca, June 30, 2023

College controlled rooms include all shared spaces not held solely as General Purpose classrooms controlled by the Registrar. Equitable and collegial sharing of these spaces is required of all users reserving meeting space in the College. By reserving College space, users agree to abide by these guidelines; failure to do so may result in revoking reservation rights.

Scheduling Privileges
The College has an identified group of Resource Managers. Resource Managers have privileges in the calendaring system to reserve College meeting rooms and can reserve rooms on behalf of others. Resource Managers are typically those personnel in each unit responsible for organizing meetings, conferences, and events; this typically includes staff in departments, the business office, the dean's office, student services, extension, continuing education, etc. Resource Managers may edit their own reservations, but they do not have privileges to edit or delete any other user reservation.

Scheduling Etiquette
- When reserving a room in the calendaring system, users must include the following information:
  - Subject Line: Meeting name (User Name)
  - Location Line: Phone (7-XXXX), Date Reserved
- Reservations must include enough time for setup and breakdown if catering is expected and/or furniture will be set up differently from the typical layout.
- Reservations should be appropriate to meeting capacities and technological needs. For example, a meeting of a handful of people should be scheduled in a smaller room, allowing larger groups to use high-capacity rooms; meetings without a videoconferencing need should be scheduled in low-tech rooms, etc.
- Reservations must be canceled promptly to allow other users full access to rooms; users should remember to cancel "held" reservations when the meeting is confirmed.
- Reservations must be calendared, even if the room is empty and your group just "pops in".
- Meetings must come to an end promptly when there is another reservation for the room on the calendar.
- A new reservation may not "bump" an existing reservation unless the priority list (see below) indicates that the new reservation has priority. Users are welcome to politely inquire whether the existing reservation can be moved and to offer to find another comparable room for the existing reservation. If the existing reservation can reasonably be accommodated in another room or at another time, the user may agree to move their reservation; however, if there are circumstances that make moving the existing reservation excessively inconvenient, or if the alternate room does meet the need, then the existing reservation retains rights to the room. Even in cases where priority necessitates bumping, users should endeavor to assist the "bumped" reservation in finding an alternate meeting space. All users agree to conduct reservations collegially and be as accommodating as possible to each other.

Maintenance

Users are responsible for resetting the furniture back to the typical layout after their meeting unless arrangements were made previously with the following scheduled user. Users must clean up any trash or catering items left in the room. Should there be significant cleanup issues (spills, dirty carpet, damage, etc.), the user has the responsibility to contact the building maintenance team and will incur any related costs. The College will provide deep cleaning of meeting rooms, as needed.

Scheduling Priority

As noted above, the priority matrix determines whether new reservations may bump existing reservations. In cases where priority necessitates bumping, the new reservation user should endeavor to assist the bumped reservation user in finding an alternate meeting space.

Reservation Priority

1. Scheduled classes for credit.
2. All-College Meetings, Department Meetings, Forestry Executive Council, Dean's Staff, and Dean's Priority Meetings (e.g. Donor Visits).
3. Student defenses.
4. Faculty recruitment/candidate interviews/seminars and new student recruitment activities/events.
5. Research Advisory Boards (e.g. CFFS, Co-ops).
6. Other College/Departmental meetings/events, lab group meetings, and student club meetings/activities.
7. Cooperative and Continuing Education Conferences. *Conferences that charge fees for participation should build in fees for reserving other campus conference space.*
8. Non-CoF groups such as other OSU units/departments, external agencies or organizations, and alumni groups not sponsored by an official college activity will have the least priority.

Arbiter of Disputes

In cases where priority is disputed and the parties cannot come to agreement, priority will be determined by the Director of Administration and Operations. The arbiter has master privileges to edit and delete reservations and has a responsibility for acting on complaints regarding maintenance issues.

Smudging Policy

Developed August 2024 by the CoF Indigenous Natural Resources Office

Background

Smudging is a cultural religious practice. Depending on the geographic location and culture, when smudging, typically sweetgrass, sage, cedar, and other vegetative culturally significant materials, alone or in combination, are lit with a match and burned to purify the body, mind, heart and spirit of persons who enter the area being smudged. Smudging is also done in private as part of personal religious practices. While the frequency of smudging varies, it is sometimes done daily, depending on individual cultural religious practices.

Smudging Practices in the College of Forestry (CoF)

The following is intended to guide safe smudging in CoF private offices and other CoF spaces:

1. Smudging materials:
    - Use small volumes of vegetative matter.
    - Avoid known toxic materials.

- Be mindful of not using substances that can affect other individuals that have smoke sensitivity or allergies.

2. Minimizing particulate matter and odor:
    - Use materials that have low flammability and emit a low volume of smoke so as not to set off smoke detector alarms.
    - Ventilate the area being smudged by opening windows while smudging.
    - Close the room door while smudging, to reduce the spread of particulates and odor beyond the area being smudged.

Space Allocation Policy

Approved June 2018

Purpose

This policy determines how decisions are made related to allocating space in the College of Forestry[1]. It is intended to convey principles and criteria that will:

1. Provide strategic, consistent, transparent and optimal space allocations in the college,
2. Provide the ability to respond effectively to meet current and future space needs, and
3. Ensure the safety and well-being of faculty, staff and students in the college.

Background

Space is an essential resource. The college has many functions that all require space in order to achieve their highest potentials and to maintain them over time. Space allocation decisions will be strategic, consistent and transparent in order to optimize the productive use of this resource; to advance the missions and priorities of the college, departments, and support units; and to enable faculty, staff, and students to efficiently and effectively meet their goals and duties. Space may require reallocation based on fairness and need, and when priorities of the college, departments or support units change. This policy helps guide difficult choices when allocating space among the various functions of the college. This policy also establishes a Space Committee responsible for assessing space needs in the college and making allocation recommendations to the Dean. The Dean is the final authority on all space allocation decisions for the college; however, she or he may delegate all or part of this authority to the Space Committee.

Space Management Committee and Process

The Space Management Committee recommends space allocations to the Dean and conducts regular inventories and assessments of all space allocations, uses and needs. The Dean appoints the Space Management Committee which will typically be composed of two administrators in in the Dean's Office (e.g., Associate Dean or Director), each of the Department Heads, and various unit managers. The Dean will appoint the Chair of the Committee. There is no term limit to serving on the Committee. The Committee may establish an ad hoc advisory group composed of representatives from various employee and student groups within the college.

The Committee's duties include:

---

[1] This Space Allocation Policy only governs facilities in and around Peavy Forest Science Center, Richardson Hall, Emmerson Lab, and the Oak Creek Building. Off-campus resources are not necessarily subject to this policy.

1. Inventorying allocations and use of space, as needed;
2. Recommending space allocations to the Dean;
3. Reviewing and making recommendations to the Dean regarding requests for space allocations or appeals of space allocation decisions; and
4. Arbitrating space conflicts.

Space Requests Process: Any individual with anticipated changes in space needs will submit, in writing, a detailed request for space allocations including all supporting documentation to their supervisor, who has discretion in forwarding the request to the Space Management Committee for evaluation and consideration. Decisions will be documented and conveyed in writing by the Committee to all affected parties within 30 days of a space allocation request.

Guiding Principles

The following principles guide space allocations:

1. Space is a limited resource owned by the college and administered by the Dean.
2. Space is allocated based on fairness and need and according to the strategic academic, research, and outreach priorities established by the college, departments, and supporting units.
3. Clustering departmental spaces is desirable, although alternative clusters by functions or interests are appropriate.
4. Current and anticipated needs, not historical allocations, are the primary weights in space allocation decisions. Consequently, all interior and exterior spaces, regardless of their current use, occupants, or the period the spaces have been occupied or used by the incumbent, may be subject to reallocation by this policy. However, space allocations will seek a balance between flexibility to meet changing demands and stability to meet long-term needs.
5. Space allocation and reallocation decisions will be transparent, with procedures that enable affected programs and individuals to participate in allocation decisions. However, the Dean has the final authority on allocating space in the college.

Space Allocation Criteria

General criteria

1. The Dean assigns space to the Department Heads, Unit Directors / Managers, and Associate Deans, who are responsible for allocating spaces according to the principles and criteria of this policy.
2. Current CoF faculty, staff, and students have priority in space allocations (e.g., office, desk or workstation, lab bench, etc.). All other individuals directly contributing to the strategic goals of the college (e.g., retired faculty, visiting professionals) may be allocated space on a temporary, space-available basis.
3. There may be costs (e.g., physical moves, remodeling, specialized equipment handling and set-up, lost productivity) associated with space reallocations. These costs are the responsibility of the College, Department, or Unit initiating the move in response to this policy.
4. Qualified individuals with special space needs will be accommodated as feasible in accordance with *OSU Policy of Nondiscrimination on the Basis of Disability* (revised 04/01/2013).
5. All vacated space is subject to reassignment by the Dean.
6. All requests for exceptions to this policy will be submitted in writing to the appropriate supervisor, who has the discretion to forward the request to the Space Committee for evaluation and consideration. The Space Committee will make a recommendation to the Dean on each case within a reasonable time frame.

Office / workspace criteria

7. Individual space allocations will meet *OSU Space Standards* (revised 06/01/2012) contingent on limits to available space.
8. Office spaces are assigned to and allocated by the person responsible for their management (i.e., Dean, Department Head, Associate Dean, Director / Manager).
9. No person will be allocated more than one office or workstation within the college.
10. Allocation of single-occupancy offices and access to private meeting space for full-time employees (i.e., 1.0 FTE 12-month, 0.75 FTE 12-month, and 1.0 FTE 9-month) will be made in accordance with the following criteria:

    a. Tenured/tenure-track professorial faculty, or other professorial faculty, and instructors with a minimum 0.75 FTE appointment in the college will be the highest priority in single occupancy office allocations.
    b. All other full-time employees' needs for single-occupancy offices (e.g., confidential communications, daily in-person conversations, quiet or noisy work environments) will be considered and allocated accordingly on a space-available basis.

11. Faculty and staff with part-time (i.e., <0.75 FTE) appointments will be housed in shared offices or open landscape (i.e., cubicles, workstations) settings with at least one other person.
12. Emeritus faculty office space will be allocated on a space available basis and in accordance with CoF *Administrative Memo #103 College of Forestry Policy Governing Space Assignment for Emeritus Faculty.*
13. Graduate students will be allocated no more than one workspace in a shared or open setting to meet their learning and research needs.
14. Faculty with primary offices not located on the Corvallis Campus (e.g., Cascades campus, extension, College Forests' and other research forests' faculty) may be allocated shared office space while working on the Corvallis Campus.
15. Visiting professionals who are directly contributing to the research, teaching, or outreach goals of the college may be allocated a private or shared office on a space-available basis.

Classroom criteria

16. Classrooms and other teaching facilities will not be depleted as a result of space reallocations in accordance with *OSU Policy to Maintain Sufficient Instructional Space* (08/21/2012).

Research / laboratory criteria

17. Reductions in the college's research/laboratory space capacity will be avoided whenever possible.
18. Department Heads are responsible for ensuring appropriate use of research/laboratory space assigned to their departments, including lab safety, accessibility, cleanliness, and the care and maintenance of equipment. Department Heads may delegate managerial oversight for laboratory spaces to lead faculty members.
19. All research/laboratory space, including cold rooms, dark rooms, equipment facilities, etc., will be defined by its primary function(s) and made available to any faculty member with a justifiable and documented need of such space and so long as capacity is available. Department Heads will set the criteria and process for permitting access to laboratory space for which they have managerial responsibility.
20. Laboratory space is allocated to individuals in the college who have a defined need for it, and on a space available basis. Tenure-track faculty will be given priority access to research and laboratory space to help them establish their research programs.
21. Emeritus faculty laboratory space will be allocated on a space available basis and in accordance with CoF *Administrative Memo #103 College of Forestry Policy Governing Space Assignment for Emeritus Faculty.*
22. The amount of space Department Heads may allocate to any research-active faculty is not fixed and may be reduced or expanded over time. The absolute amount of space allocated to any

faculty member must be carefully justified based on current and future needs, not on the historical amounts of space that have been commonly allocated to them.

23. Storage, whether short-term, long-term, or archiving of samples, equipment, or materials will be in designated spaces. The College has an aspirational goal to provide adequate, designated facilities for long-term storage and archiving purposes. Storage is permitted within a laboratory insofar as it does not interfere with the functioning and safety of the lab. Individuals responsible for managing and monitoring lab use will be responsible for designating and monitoring storage within them. All other designated storage spaces will be managed and monitored by the individual assigned this responsibility by the Dean or Department Heads.

Notes and Additional Requirements

- This policy supersedes all prior space related CoF policies. All individual agreements, written or verbal, associated with space allocations will be reviewed for consistency with this policy.
- Additional criteria that define consistent allocations across and within departments and support units will be added to this policy as they emerge in space allocation decisions.
- Users may not modify standard offices, such as paint and flooring, or remove items, such as blinds or furniture, without approval by the College Operations Manager or Dean's Office.
- The allocation of single-occupancy offices <u>or</u> access to a private meeting space for faculty and staff may be guided by their need to maintain requirements for FERPA (Family Educational Rights and Privacy Act) protected communications with students.
- This policy will be reviewed and revised by the Committee as needed.

Start-up Packages for New Faculty

When new faculty are in the recruitment process, the department head consults with the Dean on an appropriate offer, including start-up. The department head communicates with the candidate regarding their needs and consults with other faculty and the Associate Dean for Research regarding required equipment and lab space to ascertain if shared equipment/facilities are achievable or if new investments are required. The Associate Dean for Research and the Budget Director can also help the department head determine if there are other university resources available, such as other facilities or access to the Research Equipment Reserve Fund (RERF). All offers must be approved by the Dean (or their designee) before submitting to Human Resources and the candidate.

Start-up packages typically include the following:

Item/Expense Type/Category	Responsible Unit
PI Summer Salary - *@ 2.5 mos for 2 summers*	College
GRA/GTA Support – *Sal/OPE/Tuition for 8 AY terms*	College
Moving Expenses – *see OSU relocation policy*	College
Capital Equipment >$5K	College
Recruitment & Hiring Expenses - *Visa costs, etc.*	College
Service and Supplies/Equip <$5K	Department
Travel Budget	Department

Teaching Policy

Approved by Dean Maness, August 2013; revised February 2014; reaffirmed April 2022

Purpose: To establish the minimum and equitable expectations for teaching by all tenured/tenure track faculty in support of the College of Forestry's (CoF) teaching mission.

Background: CoF is widely recognized and respected for leadership in the three missions of the Land Grant University: Education, Research, and Outreach. Faculty assignments toward these missions are articulated in written position descriptions and updated annually.

Core Principles: This policy was developed based on the following core principles.

1. Students are central to the mission of CoF.
2. We recognize the need to increase the number of classes offered by CoF for the following reasons.
   a. CoF's teaching costs are highest across the University due to small program sizes.
   b. There is a dearth of graduate and honors classes.
   c. Multiple sections of some classes are needed due to increasing enrollment.
   d. New courses will be needed for new undergraduate programs.
   e. New Baccalaureate Core and service courses will help us become more integrated across campus and attract transfer students to our programs.
3. All classes offered by CoF should be taught by faculty members with professorial or instructor status.
4. The responsibility for teaching is shared equally by all faculty members and is part of all faculty members' jobs.
5. Resident courses (on-campus and hybrid[2]) are characterized by regular and significant in-person contact hours between students and the instructor of record throughout the course including classroom, lab, field, and office hour interactions.
6. Professors, instructors, and any other relevant college personnel are expected to provide regular opportunities to meet in-person with students in resident courses and with student advisees / mentees.
7. It is each department head's (DH) responsibility to assign teaching for relevant faculty members consistent with other assigned responsibilities and the faculty member's performance of those duties.

Minimum Teaching Load Policy: All tenured/tenure track faculty shall contribute CoF's teaching mission:

- Faculty with 0.75 – 1.0 FTE appointments are expected to teach, at a minimum, an equivalent of three 3-credit classes / year[3].
- It is recognized that individual classes have different workloads. It is the DH's responsibility to work with faculty to ensure that appropriate consideration is given for class size, number of labs, and other workload factors.
- Where special circumstances exist (faculty with large grad programs[4], research chairs, professorships, administrative or Extension appointments, etc.) it is the DH's responsibility to ensure <u>fairness</u> and <u>transparency</u> in making teaching assignments.
- Teaching assignments are made by the DH each year and published in June.
- The Dean and Associate Deans will review each DH's teaching allocations annually.

---

[2]A hybrid course includes both regularly scheduled on-site classroom meetings and significant online out-of-classroom components that replace regularly scheduled class meeting time. --Approved by the Curriculum Council, March 12, 2012 http://oregonstate.edu/admin/aa/apaa/hybrid-courses
[3] DH's are expected to adjust teaching responsibilities appropriately for reduced appointments.
[4] A normal graduate student load would be 2-4 students.   Faculty that desire to focus on graduate education can work with their DH to adjust their teaching load appropriately.