



UNIVERSITY OF
NOTRE DAME

**ENDOWED CHAIR TOOL
INSTRUCTIONS & GUIDELINES
FY18**

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Overview

The Endowed Chair Tool file you received contains all of the endowed chairs for your area and can be used to calculate the amount of the chair recovery, the departmental contribution (if any) and the percentages that you will need in order to update position and job labor distribution information in Host WFP for each endowed chair. The Tool was developed to be helpful, but use is not required. However, we do urge you to use the Tool to help with complex position labor distribution calculations.

The Chair Tool is similar to last year's in that it will help to provide you with input information that better matches Host WFP. You will see each chair has its own worksheet tab in order to provide more flexibility for budgeting by position and handling multiple labor distributions.

Index

The tool contains an **Index** tab, which lists the chairs and chair holders. Click on the underlined hyperlinks in Column A to go directly to a **Chair Worksheet** tab. To return to the **Index** tab, click on the "**Click Here To Return To Index**" blue hyperlink in cell D1 on any of the Chair Worksheets. The index is sorted alphabetically by chair holder name and the **Chair Worksheet** tabs are sorted by fund number.

Chair Summary

The **Chair Summary** tab provides a summary of all the relevant chair information from each of the **Chair Worksheets**. You may find this tab helpful in reviewing all of the information for your chairs in one location.

Chair Tool Worksheets

All data entry can be done on the individual **Chair Worksheet** tabs. Within each tab you will see 5 sections. Each section has blue shaded cells that can be modified or updated.

1. **Chair Information**

If you are filling vacant chairs or appointing new chair holders to existing chairs, please update the chair holder's name, NDID and discretionary amounts.

Chair recovery calculations factor in the discretionary allowance for each chair. If you want to increase or decrease the allowance for FY18, update the amount in cell C9 (FY18 Chair Discretionary Amount). Remember, an increase in the discretionary amount will reduce the chair recovery amount. Any decrease in the discretionary amount will increase the chair recovery amount. Increases to chair discretionary amounts must have Provost Office approval. The amounts input into the Chair Worksheets will be the targeted FY18 amounts that will be transferred to the chair holder's discretionary fund in July 2018. Each chair fund has been preloaded in Host with the established FY17 amount. If you need to change a Discretionary Amount, please contact Warren Williams with the change amount. You will not be able to change in Host yourself.

For FY18, the blended fringe rates of 24.8% (faculty), 30.3% (staff) and 24.7% (visiting faculty) are being used to budget benefits.

2. Calculations

Enter the new salary amounts in cells C19 (New FY18 Primary Salary) and C20 (New FY18 Secondary Salary). Once updated, the total salary, chair recovery and labor distribution amounts and percentages will calculate in Sections 3 and 4.

Some calculations have been modified in Section 4 for special treatment of labor distributions. Some calculations are more complicated, therefore, you may need to modify the formulas manually.

3. Position Salary Summary

If you are filling vacant chairs or appointing new chair holders to existing chairs, please update cell G7 (primary position number), cell G8 (secondary position number, if applicable), cell H7 (position E-Class) and cell H8 (secondary position E-Class, if applicable). Sections 3 and 4 will calculate amounts and percentages automatically. If you do not plan on filling a current vacant chair in FY18, please leave discretionary and salary amounts at \$0.

4. Host Analytics Labor Distribution Input

The labor distribution FOP'S are based on the information in Banner HR as of mid-February 2017. The pre populated labor distributions, percents and amounts can be modified or updated. If you make changes, you will need to make sure the percent columns equal 100% and the amount columns equal the budgeted base and supplemental amounts by position.

5. Summary

This section summarizes the information by category for this chair.

Finalizing Your Chair Tool

Please note that **Faculty WFP in Host** will be locked on **Friday, April 21** and **Staff and** will be locked on **Monday, May 22**. It is imperative that you complete all your WFP work by these dates.