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1 Introduction

Bargaining Power® is the first commercially available software package developed by a labor negotiator for labor negotiators to calculate the economic impact of all management and labor proposals before, during and after collective bargaining. Developed primarily for use in contract negotiations, it is equally useful for analyzing midterm changes in operations or work rules or staffing or any other business factors that affect the workforce. The software provides greater precision, sophistication, speed, and ease of use than any analytic tool in use in the field.

Real Costs in Real Time

Bargaining Power® projects *real* costs of potential settlements or changes to the current terms and conditions of work.

It dynamically simulates the changes in a workforce over time, including aging employees' lengths of service, considering projected changes in head count, turnover rates, and replacements through new hires

It factors in the interactions among proposals, so each proposal's cost takes into account the impact of other proposals in the same settlement. For example, to calculate the cost of a proposed increase in vacation time based on length of service, the system considers the concurrently proposed pay proposals as well as the aging and attrition of existing employees and projected changes in the workforce. And, the calculation can automatically include the cost of additional overtime required to compensate for the increased time off.

It enables you to define the operational impact of proposals, allowing the system to derive the costs of a proposal's effect on turnover rates, hours of work, or productivity.

Finally, you can see results instantly. Alternative proposals, assumptions and scenarios can be input and results obtained within moments -- an invaluable feature during negotiations.

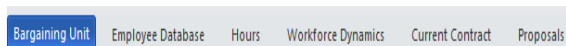
Easy to Use

The software is designed to be used easily by people with little or no previous experience with other software applications. It is developed for use on personal computers under Microsoft Windows™. Tailored entry screens allow you to enter information in as detailed or general a fashion as you choose.

Bargaining Power® requires only the basic employee information that all labor relations professionals have readily at hand. The software can read data directly from a file created from any human resource information or payroll system. Or, users can enter data manually.

How it Works

Bargaining Power® contains six main tabs:



In the tabs Bargaining Unit, Employee Database, Hours and Workforce Dynamics, you create a bargaining unit, enter an employee database, identify your economic and operational assumptions and preferred costing conventions, and describe the dynamics of their workforce -- including turnover rates and replacements through new hires and projected changes in the size or composition of their employee population.

Enter the provisions of the current collective bargaining agreement and create base cost reports:

Separated into categories of pay, benefits, time and workforce, and legislated payments, the system contains tailored screens for more than fifty types of contract provisions. Enter information about pay progressions, general pay increases, differentials, incentives, bonuses, COLA's, severance plans; time off at work, such as meal periods and guarantees; time off away from work including sick, vacation, holidays and personal days; health & welfare and pension contributions; various reimbursements and allowances, and mandated payments.

Create current contract reports against which you will cost proposals and demands with varying underlying assumptions or scenarios if you like. Bargaining Power® generates adaptable reports that present annual and total costs and display bench mark statistics, including the average cost of an hour worked or an hour paid, numerous percentage statistics, and views of labor costs compared to other financial indices such as sales or productivity. See your answers in annual dollars or costs per hour paid or costs per hour worked, or dollars per employee. You can easily customize your report, and design it to match your preferences.

Enter proposals to change the current agreement:

Enter any number of management and union proposals from scratch or by editing previously-entered provisions or proposals.

Create settlements or collections of proposals:

Select and combine proposals to constitute a settlement. Create any number of potential settlements -- tracing movement at the table, testing new ideas, combining and altering proposals at will, altering assumptions and projected operational responses -- and see the projected costs at once. As with base costs, you can obtain annual and total costs and display benchmark statistics, including the average cost of an hour worked or an hour paid, numerous percentage statistics, and views of labor costs compared to other financial indices such as sales or productivity. See your answers in annual dollars or costs per hour paid or costs per hour worked, or dollars per employee. You can easily customize your report, and design it to match your preferences.

Compare or consolidate reports: Compare the bottom-line results of multiple potential settlements or offers on a single report; or view the costs of similar proposals as they apply to several bargaining units at once.

1.1 What You Need

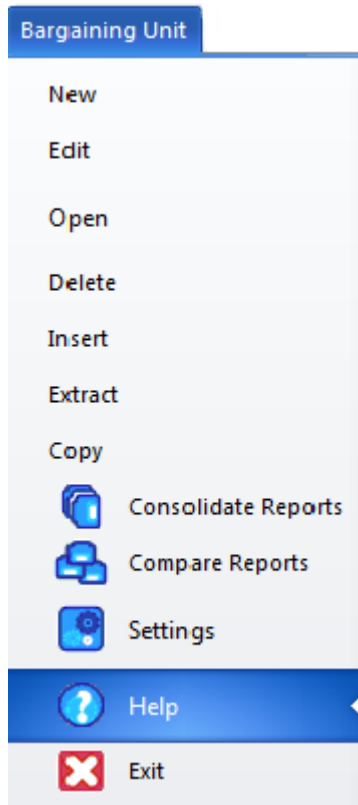
To work with Bargaining Power, you need to be prepared to:

1. Enter an employee-by-employee database. You can import the database by creating an employee database (or ASCII) files from your human resource information system, personnel or payroll system, or any system that contains the data of interest. You can also enter a database directly within Bargaining Power. The database must include an employee identification, or record number, and it must include a classification or job title name. Beyond those two pieces of information, the database may include up to 19 additional fields of interest to you. Select employee characteristics that determine pay amounts, hours of work, eligibility for benefit contribution levels, or any other economic issues that are included in your collective bargaining agreement or that you expect to consider during negotiations, or that are related to any issue you want to project or analyze. For more information, see Section 3.1.1, *Database Definition*.
2. Enter economic terms and conditions of both your current collective bargaining agreement and any changes to it -- as a result of negotiations or projected operational or business changes.

Enter data regarding pay hours (both worked and not worked). You can enter this information in as detailed or general a fashion as you like. For example, you can enter the average number of hours that all employees are paid in an average week, or you can enter the exact annual payroll hours separated by job title, length of service, and location. For more information, see Chapter 4, *Hours*.

2 Bargaining Unit

You begin working with Bargaining Power in the Bargaining Unit tab.



New, Edit, Open, Delete, Insert, Extract and Copy are available from either the Bargaining Unit tab or the Bargaining unit dialog box.

New opens an empty Bargaining Unit dialog box so you can create a new bargaining unit.

Edit opens the Bargaining Unit dialog box for the file on which you are working.

Open lists the Bargaining Unit's you have already created. To select one double-click on the bargaining unit name.

Delete allows you to delete the unit on which you are working.

Insert and Extract allow you to share bargaining unit files with other users (See Section 2.1.2, Sharing Bargaining Units Among Users)

Copy allows you to make a duplicate of the bargaining unit that resides on your hard drive.

Consolidate Reports enables you to sum the results of a set of Base Costs or a set of Proposals and Settlements across multiple bargaining units. For information on building reports for consolidation see Section 12.5.4, *Consolidate Reports*.

Compare Reports enables you to compare the bottom-line results of multiple potential settlements or offers on a single report. For information on building reports for comparison see Section 12.5.3, *Compare Reports*.

Settings enables you to establish default preferences.

Help opens the Bargaining Power help screens.

Exit closes Bargaining Power.

2.1 Creating a Bargaining Unit

To create a bargaining unit, go to the Bargaining Unit tab and select New. The Bargaining unit dialog box will appear.

In the Bargaining Unit dialog box, you enter the name of the bargaining unit, the current contract expiration date, the settlement duration, the method for entering employee population data, and your desired costing method(s).

If the settlement duration is in itself an issue in the negotiation, enter scenarios and provisions and proposals for the longest anticipated settlement duration. Then copy the bargaining unit and enter a shorter duration and Bargaining Power will automatically delete the inapplicable pension and proposal entries. For more information, see Section 2.1.1, *Copying Bargaining Units*.

The Bargaining Unit dialog box also enables you to share bargaining units among multiple users. For more information, see Section 2.1.2, *Sharing Bargaining Units Among Users*.

Bargaining Unit: Enter the name of the bargaining unit, up to 50 characters, with which you want to work. If you have already begun work on the unit, choose Open from the Toolbar, and select the bargaining unit from the list that appears. The name of the active bargaining unit appears in the Title Bar at the top of the screen.

Expiration date of current contract: Enter the current contract expiration date. Bargaining Power assumes that the new contract settlement date begins on the day after the expiration date.

Note: The default date format is defined in your Windows settings. If you wish to change the date format, see the documentation for your Windows operating system on how to choose International settings, and change the Date Format as desired.

Settlement duration: Enter a whole number indicating the total length of the contract period. Use the combo box to select either years or months. The default is years.

Population data

Import: Select from the combo box the method you will use to enter data about the employee population. The choices are Import or Manual entry. If you select Import, Bargaining Power will read an employee database or ASCII file, created from your human resources information system, your payroll system, or any other in-house system. For additional information on importing data, see Section 3.1.2, *Import*.

Manual Entry: If you are not importing data from an external source, select Manual Entry to input employee-by-employee data in spreadsheet fashion within Bargaining Power. For additional information on entering data manually, see Section 3.1.5, *Manual Entry*.

Whether you choose to import your data or enter it manually, you describe the information you will include in your database in Database Definition. For detailed information, see Section 3.1.1.1, *Database Definition*.

Effective Date of Data: The date you enter here is used to age your employee population forward through the base and settlement periods. Bargaining Power ages employees' length of service, position length of service and/or age as they increase over time. The date entered must be the last day of a month.

If you choose the "Single-year base" costing method, the Effective Date of Data should be the last day of the month one year prior to the expiration date, or the last day of the following month. If you enter an unacceptable date, the software will prompt you with the acceptable choices.

If you choose the “Multi-year base” costing method, the Effective Date of Data must be within a month of the expiration date of the current contract. If you enter an unacceptable date, the software will prompt you with the acceptable choices.

For example, if your contract expiration date is June 30, 2012, and you choose the Single-year base or Single and Multi-year option(s), your Data Effective Date must be either June 30, 2011 or July 31, 2011. If you choose only the Multi-year option, your Data Effective Date must be either 6/30/2012 or 7/31/2012.

Total number of employees: This is the total number of employees in the bargaining unit as of the Effective Date of Data. It is a read-only field that Bargaining Power populates once you have input employee data. You cannot enter or change the number here.

Base Cost Method: The choice(s) you make instruct Bargaining Power as to how to cost the current contract provisions and proposals you enter. You may choose either or both of the options for determining the base cost.

The costing methodology you select here sets up the Effective and End dates for the Hours, Workforce Dynamics and Current Contract provisions sections. Once set, these dates are protected, which means they can only be changed by modifying the base costing method.

Single-year base: With this option, you enter the provisions of your current contract and Bargaining Power calculates the cost of the contract's final year, the year directly preceding the upcoming settlement. Costs of proposals are then calculated as the cost or savings over the related base-year costs.

This option allows you to answer the question for each proposal, "How much more or less will this proposal cost than it did last year?"

Using this method allows you to check Bargaining Power's results against your own records. If the base cost Bargaining Power calculates differs from your actual base-year costs, you can alter the Workforce Dynamics and other entries you have made, making the information more detailed or discrete to account for the discrepancy. This can enhance Bargaining Power's results and allow you to proceed with greater confidence in the accuracy of your entries.

Multi-year base: Using this option, Bargaining Power calculates the marginal costs of proposals over the projected costs of continuing your current contract throughout the new settlement period. Bargaining Power projects the costs of your current contract provisions over the new settlement period, using the workforce dynamics and operational changes you project. It then compares proposal costs to these costs.

This method allows you to answer the question, "How much more or less will I pay over the settlement period than I would pay over the same period if no new settlement were made?"

A multi-year base is particularly useful in situations where there is significant economic impact associated with the aging of the employee population, high turnover, or material anticipated operational changes. This option allows Bargaining Power to provide results that isolate the costs that result directly from issues of collective bargaining, netting out costs that result from demographic or operational changes which are not attributable to the negotiation.

2.1.1 Copying Bargaining Units

Bargaining Power enables you to copy the components from an existing bargaining unit and save it under a different name. This allows you to maintain two bargaining units with different employee databases, or with different settlement durations, but the same provisions and proposals. To make a copy of an existing bargaining unit, perform the following steps:

1. Open the Bargaining unit you would like to copy and either
 - a. Select Copy from the Bargaining Unit tab or
 - b. Choose Edit from the Bargaining unit tab to and Select Copy from the Bargaining Unit dialog box.
2. Enter the name of the new bargaining unit in the entry field.
3. Click OK.

2.1.2 Sharing Bargaining Units Among Users

If you want to share a bargaining unit, including the employee database and all provisions, proposals and scenarios, use Extract and Insert. Bargaining Power enables you to extract bargaining units from one database and insert them into another database. To do this, perform the following steps:

1. Open the Bargaining unit you would like to share and either
 - a. Select Extract from the Bargaining Unit tab or
 - b. Choose Edit from the Bargaining unit tab and select Extract from the Bargaining Unit dialog box.

2. Enter the name and destination (drive and directory) of the bargaining unit you are extracting.

Bargaining Power saves bargaining units as .bpx files.

3. Click OK.

To insert a bargaining unit, or saved *.bpx file, perform the following steps:

1. Choose Insert from the Bargaining Unit tab

The Insert Bargaining Unit dialog box opens.

2. Select or type the name and path of the bargaining unit file (*.bpx) from the Insert Bargaining Unit dialog box.
3. Click OK.

2.1.3 Launching Bargaining Units From Outside of Bargaining Power

You can insert a Bargaining Unit (.bpx) file from an external application such as email, or from anywhere on your hard drive or internal networking automatically by double-clicking on the .bpx file. Bargaining Power will open and the .bpx file will be inserted automatically. The first time you do this, you will need to identify Bargaining Power (bp.exe) by following the Microsoft prompts. After you do this once on your computer, .bpx files will automatically launch Bargaining Power and insert the file. If the .bpx file is already loaded, you will be prompted to re-name it.

2.2 Settings

Settings enables you to establish default preferences and set a password.

2.2.1 Preferences

Preferences enables you to define general rules and specify default selections for entering data into the system. The Preferences dialog box is broken out into the following categories:

- Time Paid
- Length of Service
- Classifications
- Standard Entries
- Database Integrity Checks

Time Paid

Setting Time Paid Preferences can streamline your entry process in the dialog boxes in both the Time Paid provision and Proposal: Time Paid sections. Once they are set they will be assigned to all new entries by default. They can be changed in the Time Paid dialog box for different scenarios or proposals. If you do not change the preferences, Bargaining Power uses the system defaults defined below.

Number of days per week: The default is set at 5.

Overtime factor: System default is 1.5, or time-and-a-half.

Double time factor: System default is 2 or double time.

Note: There is no default for the third premium time option (XT). These must be set in the Time Paid dialog box.

Length of Service

When you vary payments or eligibilities by Length of service or Position length of service, or create groups based on Length of service or Position length of service you can enter it in months or years. The default selections are expressed in months, but you can change them in Preferences.

Length of service expressed in: Years or months.
The default is set to months.

Position length of service expressed in: Years or months.
The default is set to months.

Note: If you change either Length of Service or Position Length of Service defaults after you have already used the characteristics, Bargaining Power automatically changes any previously entered values by multiplying by 12 (years to months) or dividing by 12 (months to years).

Classifications

Setting Preferences can streamline your entry process in the Classifications category. These preferences must be set prior to importing or manually entering the employee database. Once they are set they will be assigned to all classifications by default. If you do not change the preferences, Bargaining Power uses the system defaults defined below.

Work status: System default is Full-time.

Payment: System default is Hourly.

Differentials: System default is None. Bargaining Power provides you with a list of default differentials to choose from. You can enter your own differential names in the Classifications screen. To streamline your data entry in the Classifications screens, you can Apply to All the selections you make for one Classification. You can then remove them from any classifications to which they do not apply. For more information see Section 3.2, *Classifications*.

Incentives: System default is None. Bargaining Power provides you with a list of default incentives to choose from. You can enter your own incentive names in the Classifications screen. To streamline your data entry in the Classifications screens, you can Apply to All the selections you make for one Classification. You can then remove them from any classifications to which they do not apply. For more information see Section 3.2, *Classifications*.

Standard Entries

Setting preferences for standard entries can streamline your data entry process in all description dialog boxes. The system defaults are defined below however they can be changed at any time. For detailed descriptions of these entry screens, see Chapter 5, *Standard Data Entry*.

Changes: System default is Annually.

Varies by: System default is Length of Service.

Enter: System default is \$ amount.

Percentage of: System default is Base pay.

Enter for: System default is Single employee.

Amount per: System default is Hour.

Database Integrity Checks

These selections enable Bargaining Power to check the employee-by-employee database you enter to identify errors. When a database is imported, or the data that you input manually is saved, Bargaining Power checks to assure that no rules are violated. Bargaining Power displays the entries that appear to be in error so you can change them.

Minimum age: Bargaining Power checks the dates of birth to assure that none result in an age younger than that specified here. The default is 16.

Maximum age: Bargaining Power checks that no dates of birth result in an age older than that specified here. The default is 75.

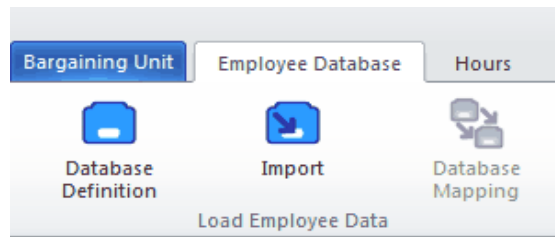
Position length of service can be greater than length of service: If this selection is made, Bargaining Power will not check to assure that position length of service is less than employment length of service.

3 Employee Database

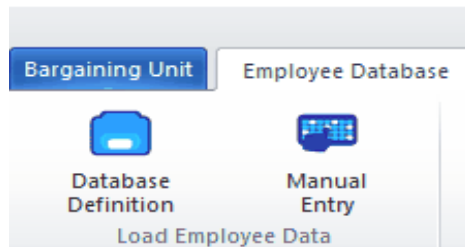
3.1 Loading the Employee Database

In the Bargaining Unit dialog box you choose an input method for the employee-by-employee database. You can either import the data from an external source or enter the data manually. The options in the Employee Database tab will reflect this choice.

If you select Import, you are presented with the following options on the Employee Database tab:



If you select Manual Entry, you are presented with the following options on the Employee Database tab:



3.1.1 Database Definition

Prior to importing an employee database you must first complete the Database Definition screen. When you select Database Definition, you are presented with a matrix in which you define and describe the fields of information, or employee characteristics, that you will import or manually enter and those that you will enter in summary fashion.

You can have only one database definition for each bargaining unit.

The Database Definition matrix has five columns:

Characteristic: Bargaining Power displays six standard characteristics, and allows you to enter up to 15 of your own.

The default Characteristic names are:

Unique ID: This is a required, numeric field. It can be a Social Security number, a record number, or an employee identification number.

Classification: This is a required field, or characteristic. Up to 100 classification names can be defined. All Classifications appear in the **Based on** menus.

[illegible]

Date of Hire: If you include this Characteristic, both Date of Hire and Length of Service options appear in all ***Vary by*** and ***Based on*** menus. If you do not include a Date of Hire or a Position Start Date field, the Pay Progression and Probation Period Increase menu items located in the Pay section will be grayed out. Pay Progressions and Probation Period Increases are functions of either length of service or position length of service, neither of which can be discerned without dates of hire or position start dates.

Position Start Date: If you include this Characteristic, both Position Start Date and Position Length of Service appear in all ***Vary by*** and ***Based on*** menus. If you do not include a Date of Hire or a Position Start Date field, the Pay Progression and Probation Period Increase menu items located in the Pay section will be grayed out. Pay Progressions and Probation Period Increases are functions of either length of service or position length of service, neither of which can be discerned without dates of hire or position start dates.

Date of Birth: If you include this Characteristic, both Date of Birth and Age appear on all ***Vary by*** and ***Based on*** menus.

Actual Rate: You can include an actual hourly rate field that will enable you to enter either Pay Range provisions or proposals or to cost employees' actual base rates as of the data effective date as though they were Current Contract provisions. These rates may include decimal points.

Location: This field is used to distinguish geographically distributed employee populations.

If Length of Service, Position Length of Service, or Age fields are included in your current database, they should not be selected for import or manually entered. Bargaining Power calculates Length of Service, Position Length of Service and Age based on dates of hire, position start dates, or dates of birth.

To include additional characteristics:

Type the name of the characteristic (up to 50 characters) in the Characteristics column. Then populate the other columns in the Database Definition table.

Selected: Check this box if you will use the named characteristic. If you check this box, the characteristic appears in *Vary by* or *Based on* menus. You may select or name characteristics that you do not enter through the import or manual-entry process, but that you will, instead, define in summary fashion, using Values on the Toolbar. This feature is only available for alphanumeric characteristics -- it may not be used for date or numeric characteristics. Indicate that you will define such a characteristic by checking *Selected*, but leaving *In Database* unchecked. You must then describe the characteristic prior to saving the Database Definition. You can name and define the characteristics at any time and the newly-named characteristic will appear in all *Vary by* and *Based on* menus that appear subsequently.

If you are importing a database that contains fields that you do not intend to use as Bargaining Power characteristics, check the *In Database* field but do not check *Selected*. The data you import for these characteristics will be ignored by Bargaining Power.

Selected is automatically checked for the characteristics that you name and enter. Because *Unique ID* and *Classification* are required entries, they are automatically *Selected* and included in your database.

In Database: Select this box to indicate that a characteristic will be included in either the import or manual entry process.

Type: Select the format of information to be entered for the characteristic. Your options include alphanumeric (text-based) or numeric.

- Alpha indicates that the values entered for the characteristics are discrete. They cannot be used to form a range of values.
- Numeric values are continuous, and can be used to form ranges of values.
- Date of Hire, Position Start Date, and Date of Birth are date characteristics, and are aged over time.

With the exception of **Classification**, alphanumeric characteristics may contain up to 50 values. There can be up to 100 classifications. There are no limits on numeric or date characteristics.

Order: The order that you specify is the order in which the characteristics will be entered or imported. It will also be the order in which characteristics are displayed in *Vary by* menus.

Database Definition Values

Values on the toolbar is activated once you have completed the import or manual entry or when you have indicated that a characteristic is selected, but is not in the database -- meaning that you will enter information about the characteristic in summary fashion. Values is not available for Unique ID or dates.

If you imported data from a database, the values in the Values dialog box will be read-only.

Position your pointer on the name of a characteristic and select Values on the Toolbar. The Values dialog box opens.

To Enter Information in Summary Fashion

Characteristic: This is a read-only field, which tells you which characteristic you selected prior to entering the Values dialog box. Note that you can only use this function for alphanumeric values.

For: Use this combo box to select Entire Bargaining Unit or any subgroup of employees for which you will enter values and counts.

Name: Enter the individual entries, or values, that comprise the selected characteristic. For example, the characteristic, Location, might be populated with the following values: Northeast, South, Midwest, Southwest, and West.

Count: Enter the number of employees who share the characteristic as of the Effective date of data. Bargaining Power verifies that the counts you enter sum to the count of the group you selected in **For**. You must account for all employees in the group.

For example, if you have a characteristic called Certification, and employees either have the certification or they do not, you enter two names, Certified and Non-Certified, to account for all employees in the group. You cannot enter Certified as a single name and account only for the certified employees.

When you have completed filling in the Values for the selected Characteristic, click Save to store the data or click Cancel to return to the Database Definition dialog box without saving.

To View Alphanumeric Information

You can view the values of an alphanumeric characteristic that you have entered or imported by highlighting the characteristic's name and clicking Values in the Database Definition dialog box. This allows you to see the values and their employee counts for the selected characteristic.

Characteristic: This is a read-only field, which tells you which characteristic you selected prior to entering the Values dialog box.

Name: This column displays the values entered for the characteristic.

Count: This column displays the number of employees with the value shown in the Name column as of the Effective date of data.

3.1.2 Import

Bargaining Power allows you to import an employee database (ASCII) file that is formatted as follows:

- Fields are in the order designated in the Database Definition dialog box.
- Numeric fields without commas or decimal points. This rule does not apply to the Actual Rate field, which can contain decimal points.
- Dates in the order Month Day Year, and formatted according to Windows standards, i.e., including date slashes (5/12/18 or 05/12/18 or 05/12/2018).

Selecting Import opens the standard Windows Import dialog box where you select the file to import. Complete the Import dialog box as follows:

File Name: Enter the name of the file that you wish to import, or select from the box below which contains all files that meet the Type chosen in the directory and drive selected as shown on the screen.

List files of type: This field allows you to select the file format (.csv, .dat, .txt or all files *.*). Bargaining Power accepts ASCII files, commonly named with .csv or .dat extension. However, a valid ASCII file will be accepted with any file extension.

Directories: This is a standard Windows directory selection box. Use the file folder icon to open directories and subdirectories and select the directory where the file resides.

Drives: This combo box displays all the available drives (A:, C:, etc.). If you are operating on a Local Area Network system, the selection list includes all drives and drive mappings to which you have access.

Read Only: When selected, this option allows you to view the data but not make changes to it. The default is not selected.

When you have made your selection and choose OK, Bargaining Power begins the import process. A Progress Bar indicates that processing is taking place. If you Cancel at any time, the import process is aborted and no information is transferred to Bargaining Power. When the import is completed, Bargaining Power displays the Import dialog box.

The following status messages appear:

Number of Employees: Indicates the number of employee records that were correctly processed.

Number of Classifications: Indicates the number of classifications that were imported.

Number of Errors: Indicates the number of employee records that were rejected.

The Import toolbar contains three selections:

Browse: Allows you to view the imported employee database.

Export: Bargaining Power will create a .csv file that you can use to edit for a re-import, or to transmit to a colleague or to Bargaining Power support personnel. When you invoke “Export” you will be prompted to designate where you would like to save the file the software will generate.

Error Records: You can select this option to view the employee records that were rejected because they did not meet the validation criteria. You can make corrections on the screen.

The import validation criteria assure:

- The correct number of fields, or characteristics have been imported according to the number of characteristics for which you selected "In database" in the Database Definition dialog box.
- Unique ID's are unique -- there are no duplications.
- No commas appear in numeric fields, e.g., 10,000 is entered as 10000.
- Decimal points do not appear in numeric fields, except in the Actual Rate field.
- Date format is correct.
- No field is empty.
- Employee Hire Date and Position Start Dates are on or before the Data Effective date specified in the Bargaining Unit screen.
- Employee Dates of Birth are prior to related Hire Dates.
- Position Start Dates are on or after related Hire Dates, unless you specify otherwise in the Preferences dialog box.
- Age is between 16 and 75, or the alternative ages you specify in the Preferences dialog box.

Re-Import: Select this option if you want to Re-import an employee database in Bargaining Power. If you select Re-import, Bargaining Power warns you that this process completely erases the existing employee database. All entries you have made in the bargaining unit file remain. You can choose OK to proceed with the re-import or Cancel to return to the previous screen without re-importing. For more information on Re-Import, see Database Mapping (Re-Import). Prior to re-import, you may return to Database Definition and add or delete fields. To delete fields, press shift+delete. For more information on Re-Import, see Section 3.1.3, *Database Mapping (Re-Import)*.

If you want to maintain two or more employee databases, you can copy the bargaining unit and re-import. For more information, see Section 2.1.1, *Copying Bargaining Units*.

3.1.3 Database Mapping (Re-Import)

You can import a new employee database into a bargaining unit file using the Re-Import function.

Use Re-import when you save a settlement as a new base (see Section 12.6, *Save as Base*) or when you find there are errors in the database you initially imported.

If you import an employee database file after you've performed the Save As Base function and the new employee database file has different characteristics or fields (either more or fewer) you must update the Database Definition prior to the Re-Import.

To re-import a new employee database, perform the following steps:

1. Go to the Employee Database tab and select Import.
2. Select Re-import. You will receive an error message that says, "Continuing with re-import will delete the existing database."

Note: Bargaining Power will not delete the provisions, proposals or reports in the bargaining unit.

3. Select the employee database file you'd like to re-import and click Open.
4. The Database Mapping (Re-Import) screen will appear.

All Entries	Preferred Entry
Certified	
Non-Certified	

5. Use Auto Map to enable Bargaining Power to match alphanumeric values from the original employee database file to the re-imported employee database file.
6. Select each alphanumeric field from the Characteristic drop-down list to check that the values in the Preferred Entries column are matched correctly. If they are not, you can change them by typing new values in the Preferred Entry column, or by selecting existing values from the Preferred Entry drop-down menu. (This process is described in more detail below.)
7. After the Preferred Entries column is as you'd like it to be for every alphanumeric Characteristic, select Save.

Below we discuss several possible relationships between the values in a field in an original employee database and an imported one. We use the example of a Shift Differential field.

The scenarios discussed are:

1. When there is an exact match between the values in a characteristic in the re-imported employee database and the original employee database;
2. When the re-imported employee database has more values than the original
3. When the re-imported employee database has fewer values than the original.
4. When the re-imported employee database has the same number of values as the original, but the values themselves are different;

Re-Import Scenarios

1. If the re-imported employee database has the same values as the original in the Shift Differential characteristic, Day, Evening and Night, the Database Mapping (Re-import) screen will appear as follows:

All Entries	Preferred Entry
Evening	
Day	
Night	

The values in green are in both the original employee database file and the re-imported employee database file. Differential provision and proposal entries will be unchanged in the new bargaining unit file.

2. If the re-imported employee database has one or more values than the original database had, the Database Mapping (Re-import) screen will appear as follows:

Database Mapping (Re-Import)

Auto Map Save Cancel

Characteristic: Shift

All Entries	Preferred Entry
Evening	
Day	
Night	
Graveyard	

The values in green are in both the original employee database file and the re-imported employee database file, and the additional value from the re-imported employee database is in white. In the Shift Differential provision, there will be an additional row for Graveyard, which will not have a differential amount associated with it in the provision entry matrix.

3. If the re-imported employee database has fewer values than the original, the Database Mapping (Re-import) screen will appear as follows:

Database Mapping (Re-Import)

Auto Map Save Cancel

Characteristic: Shift

All Entries	Preferred Entry
Evening	- Eliminate -
Day	Day
Night	Night

The value in blue is in the original employee database file but not in the re-imported employee database file. Auto Map will eliminate this value and the entries in scenarios, provisions and proposals that are associated with it.

4. If the re-imported database has the same number of values but they are all different the Database Mapping (Re-import) screen will appear as follows:

Database Mapping (Re-Import)

Auto Map
Save
Cancel

Characteristic:
Shift

All Entries	Preferred Entry
Evening	~ Eliminate ~
Day	~ Eliminate ~
Night	~ Eliminate ~
First	First
Second	Second
Third	Third

The values in blue are in the original employee database, but are not in the re imported database. The software will eliminate these values.

If you make no change to what Auto Map displays, the differential provision will display the values First, Second, and Third, but will have no dollar amounts associated with them. If First is the same as Day, Second the same as Evening, and Third the same as Night, you can choose the values First, Second and Third in the appropriate rows next to Day, Evening and Night from the drop down menu to the right of the Preferred Entry column. The shift differential provision will then maintain differential amounts entered in the provisions or proposals in the bargaining unit file and assign them to the new value names.

Database Mapping (Re-Import)

Auto Map
Save
Cancel

Characteristic:
Shift

All Entries	Preferred Entry
Evening	Second
Day	First
Night	Third
First	First
Second	Second
Third	Third

3.1.4 Database Mapping

Database Mapping is available only if with imported (rather than manually entered) employee databases. It allows you to change imported values, either by renaming original values or by combining values in a many-to-one relationship. Once you have changed entries through Database Mapping, the originally imported values are lost. If you want to return to the original values, you must re-import the database.

The mapping function enables you to tailor imported data for improved access, reduce the number of distinctions to simplify data entry, and overcome limitations of the database from which you are importing data.

For example, if the database from which you are importing has eighteen values for location, but you are addressing issues that distinguish among only six location groupings, you can amend the database so it contains only the six locations of interest by combining some of the original entries. Or, if your database contains alpha numeric codes, and you prefer to have text displayed in Bargaining Power, you can enter your preferences in Database Mapping.

Database Mapping

Auto Map Save Cancel

Characteristic: Health

All Entries	Preferred Entry
b456	HMO
h732	Blue Cross/Blue Shield

Characteristic: Using the combo box, select from the alpha-numeric Characteristics defined in the Database Definition dialog box the one that you want to alter.

Entries received: Bargaining Power displays all unique values in the selected Characteristic field.

Preferred entries: Enter your revised entry in this field. Once input, each new entry becomes a selection in the Preferred entries combo box, enabling you to select it for subsequent Entries received, rather than re-typing it.

3.1.5 Manual Entry

When you select Manual Entry, you are presented with a spreadsheet-like dialog box in which you can enter employee-by-employee data. There is a column for each characteristic that you indicated was "In Database" in the Database Definition dialog box. The characteristics are in the order that you assigned them.

You must complete each entry in a row-wise manner. Bargaining Power stops you at each row if you have made an error or violated an entry rule, in the same manner that it locates errors in imported databases. For additional information on Error Records, see Section 3.1.2, *Import*.

As you enter an alpha-numeric value, it becomes available for selection for all the other cells in that column. It is suggested that you select, rather than re-type, repeating values to avoid typographical errors.

On the Manual Entry toolbar, Cancel closes the Manual Entry screen and Delete removes the row on which your cursor is placed

3.2 Classifications

In Bargaining Power, Classifications are key employee groupings. You can enter every unique job title as a classification, or you can combine job titles to form classifications if titles are paid in the same manner, to minimize your entry time.

The Classifications dialog box contains the following fields:

Name: This is a text entry box. Select Open to see a list of all the classification names in your employee database. Choose the classification you wish to describe by highlighting and selecting it. You can also change the name of any classification by selecting the classification, typing the new name, and selecting Save on the toolbar.

Number of employees: This is a system-generated field, for information only. It displays the number of employees in the classification as of the Effective date of data according to your database. You cannot change this number.

Work status: Use the combo box to indicate whether the classification is Full-time, Part-time, or Incentive Only. Classifications that are Incentive Only are those that are not paid based on the time that they work, but are paid according to some other measurement, such as productivity, commission, or piece work. If employees in a classification are paid based on time (straight time, overtime or double time) or they have any pay rates set by means other than incentives, do not categorize the classification as Incentive Only, because neither pay rates nor pay hours may be entered for Incentive Only classifications. However, incentives can be entered for both full-time and part-time employees.

Payment: From the combo box, select either Salary or Hourly. If the classification is Incentive Only, Payment is not available for entry. If a classification is salaried but eligible for overtime or double time the software will derive an hourly rate based on the hours entered in Time Paid. Employees will then be paid the hourly rate for any overtime hours associated with them.

Differentials: From the combo box, select one or more differentials. If you select more than one differential for the classification, the first appears, followed by an ellipsis (...). To define a differential that does not appear in the combo box list, position the cursor in the differential field, enter the name, and press Enter. Bargaining Power inquires whether the differential is hours-based. Hours-based differentials appear as rows in the Time Paid Matrix, and you are required to enter the hours for which the differentials are paid. For incidence-based differentials, you define the frequency of payment when you define the differential in the Current Contract or Proposal tab. They do not appear in the Time Paid matrix. For more information, see Section 8.7, *Differentials* and Section 8.7.1, *Hours-Based Differentials*.

Once you name a differential for a classification, it becomes available in the combo box for all other classifications.

To modify a differential name or to change a differential from incidence-based to hours-based, perform the following steps:

1. Select the differential from the Differentials drop-down combo box.
2. Press F2. This will bring the differential name into the entry field.
3. If you want to change the name, edit the entry and press Enter. Bargaining Power will ask you to confirm the change.
4. If you only want to change the type, press Enter. Bargaining Power will ask you to confirm the change.
5. Once the change is complete you must re-select the differential from the Differentials drop-down combo box.

Note: If the differential is in use in a provision or proposal, you will not be able to change the differential type. In order to change a differential

type that is in use you must first delete the differential provision and/or proposal.

Incentives: Using the combo box, select one or more incentives. If more than one incentive is selected for the classification, the first appears, followed by an ellipsis (...). To define an incentive that does not appear in the combo box list, position the cursor in the incentive field, enter the name, and press Enter. Once you name an incentive for a classification, it becomes available in the combo box for all other classifications.

For employees classified as Incentive Only, at least one incentive must be selected.

Earning types: These checkboxes allow you to define the categories of premium time for which the classification is eligible, in addition to Straight Time. Check one or more of the boxes to select from the following:

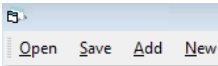
- **Overtime:** Calculated as straight time x 1.5, unless you specify otherwise in the Time Paid dialog box or the Preferences dialog box.
- **Double Time:** Calculated as straight time x 2, unless you specify otherwise in the Time Paid dialog box or the Preferences dialog box.
- **Premium Time (XT):** Calculated as straight time multiplied by the Straight Time Multiple you define in the Time Paid dialog box.

For more information on the Preferences dialog box, see Section 2.2.1, *Preferences*. For more information on the Time Paid dialog box, see Chapter 4, *Hours*.

Apply to All: You can apply the choices you make in Work Status, Payment, Differentials, Incentives and Earning Types to all classifications without having to enter the Classifications screen for every classification. Once you have saved a Classification entry, this option is available. If you invoke Apply To All after removing a selection for a differential or incentive, you are asked whether the software should delete related data. If you say yes, any differential or incentive provision or proposal of the type you are removing will be deleted.

4 Using the Tool

In Bargaining Power, you can create new hours and provisions, proposals, modify or delete the provisions. You can select a provision, modify it, to view it.



For information on the appropriate section, see *Running Reports*.

OPEN lets you choose a workforce scenario, a settlement that you choose **OPEN**, the entries appears in a

SAVE overwrites a modifications under choose **SAVE**, the the earlier entry is c

ADD saves an entry selection. Use **ADD** bargaining unit, hour provision, proposal. Use **ADD** also when entry and want to s as saving the modif

NEW clears the dia new entry, and retu defaults.

s a previously-completed entry from

is available only in a Proposal screen.
select a current contract provision so
it to create a proposal. You must
l you create under a unique name
t have the same name as a current
on.

4.1 Notes

NOTES allows you to save a note with a selected provision, proposal, or proposals.

When you select **Notes**, a dialog box appears which displays the notes for the selected provision. When you have completed your note, you can retain them and attach them to the selected provision or scenario in which they were created. If you have saved a note that you no longer want, the word **Notes** as follows. This indicates that the note is to indicate that the note is no longer valid for that particular scenario, or scenario. This is a settlement report.

Select **cancel** to return to the main screen saving the notes.



action has two purposes:

u to retain information about an
as when you made it, why you made
t is a union or management proposal,
rrent contract provision came to be

explanatory text for the reports you
Base Costs and Proposals and

de all of a note, or part of a note,
on your reports when a provision or
or included in a base or collection of
a back slash (\) at the beginning and
would like to have printed. You can
characters of a note.

5 Standard Data Entry

Most of Bargaining Power's data entry and display features are standardized across current contract provisions and proposal sections and among the Pay, Benefit, Time and Legislative categories.

You enter data in each section or category in a particular description dialog box, depending on the menu choice you make. A sample description dialog box appears below:

Benefits Provision - Pension

Open Save Add New Delete Notes Contribution Entry

Name: Pension

For: Entire bargaining unit

Effective: 1/1/2012 End: 12/31/2015

☒ Changes: Annually

☐ Varies by:

Enter for: Single employee

Enter: % of pay per

☐ Exclude from time off payments

Percentage of: Base Pay

☐ Enter employee contribution as: per Hour

Apply to:

	ST	OT	DT
Regular	✓	✓	✓
Shift			

Below is a list of the standard data entry features. Each one is described in detail in the sections that follow:

- Name
- For
- Effective/End Date

- Enter for
- Enter
- Changes
- Amount Per
- Varies by
- Apply to
- Pyramiding Option

Note: If entry for a particular provision or proposal entry differs from these standards, the exception is discussed in the documentation for the provision or proposal type itself.

5.1 Grouping Employees

Bargaining Power requires you to identify the group of employees for whom you are entering a provision, proposal, time paid or work force dynamic scenario.

You may define a group of employees as broadly or narrowly as you wish. Some examples of groups you can select or create are:

- The entire bargaining unit.
- All full-time employees.
- Employees in one or more job classification.
- All employees who work in a particular location.
- All employees hired prior to a particular date.
- All employees that have or attain a particular length of service.
- All employees within a single classification who work in one of three locations, if they have, or when they attain a particular length of service eligibility.

5.1.1 For

In each description dialog box, you identify the group of employees using the ***For*** entry field.

To identify and select a group of employees within a description dialog box, click on the Ellipsis button (...) to the right of the ***For*** entry field. The Employee Group dialog box appears.

Employee Group

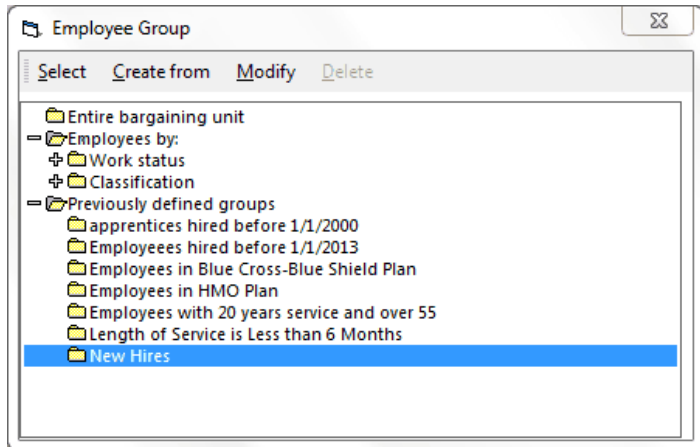
The Employee Group dialog box includes the following list, as it applies to your bargaining unit:

Entire bargaining unit: Open this folder to choose all employees in the bargaining unit.

Work status: Open this folder to choose all Full-time, all Part-time, or all Incentive-only employees.

Classification: Open this folder to choose a classification from your employee database.

Previously defined groups: Open this folder to choose from among the groups of employees you have already created.



Once you have highlighted a choice, specify an action by selecting one of the following choices on the Toolbar:

Select applies a provision, proposal, or scenario to all the members of the highlighted group. When you choose select, you are returned to the description dialog box.

Create from enables you to make a subset of the group you have chosen based on any characteristic in your employee data base. When you choose create from, you invoke the Group Creation dialog box. See the section entitled *Group Creation* that follows.

Modify is available when you highlight a previously-defined group. It allows you to change the description of the group. When you modify a previously-defined group, all provisions and proposals to which the group is attached are applied to the members of the modified group. Provisions, proposals, and scenarios are always applied to members of the group as it is defined at the time of costing.

When you choose Modify, you invoke the Group Modification dialog box.

If a group is created based on work status, classification, or a summary characteristic and it is connected to a provision, proposal, or scenario, it cannot be modified. If a group cannot be modified, an additional selection entitled **View** will appear on the toolbar. **View** enables you to look at the group definition to see how it was defined but you cannot change it.

If you want to change the definition of a group that cannot be modified, you must first detach it from all provisions, proposals, or scenarios. Do this by returning to those description dialog boxes, changing your **For** selection, and replacing them. Once this is done the group becomes eligible for modification.

Delete is available only for groups you create. You cannot delete a group that is attached to any background scenario, provision or proposal. In order to delete such a group, you must first delete the associated scenario, provision or proposal, or change it to apply to a group you do not plan to delete.

Group Creation

You can create up to 100 groups for a single bargaining unit.

To create a group, click **Create from** on the Employee Group dialog box toolbar. The Group Creation dialog box appears.

Characteristic	is	Value
Health	is	HMO
Date of hire	on or after	3/1/2010

This dialog box also appears when you modify a group. See the section entitled *Group Modification* that follows.

Group name: Enter the name of the new group you want to create (up to 50 characters).

Created from: This field is provided by the system and displays the selection you made in the Employee Group dialog.

Based on: Displays a matrix where you can differentiate the new group of employees from its parent group based on one or more characteristics from your employee data base.

The columns of the matrix are:

Characteristic: Cells in this column contain a combo box from which you can select any employee characteristic included in your employee data base, such as Length of Service, Location, or Hire Date. You can use up to 50 rows to define a single group.

To select options from the combo box in this column click inside the cell and click the down arrow. The list of available options appears. You can select an option using your mouse pointer or by typing the first few letters of the value you are selecting.

To create a group composed of multiple classifications, you must choose Entire Bargaining Unit from the Employee Group dialog box.

If you use multiple characteristics to describe a group of employees Bargaining Power includes employees who match all of the characteristics you describe. For example, if Age is 65 and Length of Service is greater than or equal to 20 years, Bargaining Power will only include employees that are both 65 years old AND have at least 20 years of service. However, when you enter multiple values for a single characteristic, Bargaining Power includes employees who meet any one of the values that you have defined. For example, if you say Location is New York and Location is New Jersey, Bargaining Power will include in the group employees whose location is either New York OR New Jersey.

The following additional rules apply. If you choose Hire Date, Length of Service becomes unavailable. If you choose Length of Service, Hire Date becomes unavailable. The same is true for Position Start Date and Position Length of Service, and for Date of Birth and Age. The “aging” characteristics are treated as follows: If you choose Length of Service, Position Length of Service or Age, Bargaining Power adds to the group all employees who meet the criterion as it is attained.

Is - In this field choose from the operators displayed for the selected characteristic.

For *numeric* characteristics (Length of Service, Position Length of Service and Age)

=	(equal to)
<	(less than)
>=	(greater than or equal)
≥= and ≤	(between, including both values entered)

For *dates*

is	
before	
on or after	
between	(on or after the first date and before the second date)

For *alphanumeric*, the only choice is:

is

Value: Enter or choose the criteria to complete the definition. For alpha-numeric characteristics, you select from a combo box that displays all the values included in the employee data base for the chosen characteristic. For numeric characteristics, you enter the appropriate values. If you are entering a range (for numeric characteristics for which you have selected “between”) enter the lower and upper values of the range separated by an ampersand (&), or a comma (,).

To select options from the combo box in this column click inside the cell and click the down arrow. The list of available options appears. You can select an option using your mouse pointer or by typing the first few letters of the value you are selecting.

To delete a row you have entered, move to the cell in the Characteristic column and press the Delete key.

When you have completed defining the group, choose Save to return to the Employee Group dialog box. Your newly created group now appears under the Previously Defined Groups folder. You can either use Select from the Toolbar or double click on the name to work with this group in any description dialog box.

Group Modification

You can modify a group description by adding, deleting, or changing a characteristic, “is” operator, or value. To delete a row, move to the cell in the Characteristic column of the row and press the Delete key. You can add up to a total of 50 rows.

When you have completed the modification, choose Save to return to the Employee Group screen. You can either use Select from the Toolbar or double click on the Name to work with this group in the description dialog box. If you choose Cancel, the original group description will remain unchanged.

For: Example

In the following example, Bargaining Power applies the provision, proposal or scenario to all employees that meet the following specifications:

Classification is Mechanic

Classification is Assembler

Location is New York

Location is Connecticut

Length of Service is greater than or equal to (\geq) 6 months

Characteristic	is	Value
Classification	is	Assembler
Classification	is	Mechanic
Location	is	New York
Location	is	Connecticut
Length of service	\geq	6

5.2 Description Dialog Box

In this section you will use the description dialog box to enter data for the selected section or category. A description for each field found in the description dialog box follows.

5.2.1 Name

Name is a required field, used to enter the name of an hours or workforce scenario, Provision, Proposal, Base Cost, Collection of Proposals, new Employee Group, or Season Grouping. The name you enter becomes available in Open menus, allowing you to work with your entry later. A name may contain up to 50 characters, and may include numbers or symbols. Provision and proposal names appear as entered on costing reports. All names must be unique.

5.2.2 Effective / End Date

These fields display the effective and end dates of Background and Current Contract provisions and proposals. In the Proposals section you can change Effective and End dates. Note that Bargaining Power calculates costs in monthly increments. Therefore, all Effective Dates must be entered as the first day of a month. All End Dates entered in description screens must be the last day of a month. To learn how to enter data to calculate a partial month cost, see **To Derive Partial Month Costs** located in the *Effective Date: Advanced Topic*.

In Bargaining Unit, Hours, and Workforce Dynamics

Effective Date: Bargaining Power provides this date, which cannot be changed. For Work Force Dynamics, the Effective Date is the Effective Date of Data that you entered in the Bargaining Unit screen. If you select the Base Cost method, Single-year base in Background: Bargaining Unit, the *Effective date* for Time Paid is the first day of the last year of the current contract. If you select Multi-year base, the *Effective date* for Time Paid is the first day of the upcoming settlement, or the day after the expiration date of the current contract.

End Date: Bargaining Power provides this date as the last day of the upcoming settlement period for Multi-year base, and the last day preceding the upcoming settlement for Single-year base. The date cannot be change

In Current Contract

Effective Date: Bargaining Power provides this date, and it cannot be changed in this field. If you select the base cost method, Single-year base in Background: Bargaining Unit, the *Effective Date* is the first day of the last year of the current contract. If you select Multi-year base, the *Effective Date* is the first day of the upcoming settlement, or the day after the expiration date of the current contract.

If a current contract provision that you want to enter begins after the Effective date, you can perform the following steps:

1. “Change” it “by date” on the provision description dialog entry. (For additional information, see Section 5.2.4, *Changes*).
2. After you have completed filling in the description dialog box, click Entry.
3. Enter a zero value in the Entry matrix under the provision Effective Date.
4. Enter the true start date of the provision in the top of the second column of the entry matrix. This date has to be the first day of a month. To learn how to obtain partial-month costs, see **To Derive Partial Month Costs**, located in the *Effective Date: Advanced Topic*.
5. Enter the appropriate value in the second row of the second column.

End Date: For Multi-year base, this is the expiration date of the current contract. For Single-year base, it is the day preceding the upcoming settlement. It cannot be changed in this field. If a current contract provision ends prior to this date, you can check **Changes** and choose “By date” from the combo box, as described in *Current Contract: Effective Date*, above. You can set the value to zero on the date the provision ends.

In Proposals

Effective Date: The default *Effective Date* is the first day of the upcoming settlement, but you may enter a later date in this space. When the Effective Date you enter for the proposal is after the beginning of the upcoming settlement period, and you have entered a related current contract provision for the same group of employees, Bargaining Power will continue the provision until the Effective Date of the proposal. You can change the Effective Date of a proposal to the first of any month during the settlement period. If you would like to enter data to calculate a partial month cost, see **To Derive Partial Month Costs** located in the *Effective Date: Advanced Topic*.

End Date: The default End Date is the last day of the upcoming settlement duration, but you can override it. If you enter an earlier end date, Bargaining Power will terminate the proposal (change its value to zero) on the end date you enter. End dates must be entered as the last day of a month. If you would like to enter data to calculate a partial month cost, see **To Derive Partial Month Costs** located in the *Effective Date: Advanced Topic*.

Effective Date: Example

If the expiration date of your current contract is June 30, 2018, and you enter a 3 year settlement duration, the following dates will appear on your description dialog boxes:

	Effective Date	End Date
Single-year base		
Work Force Dynamics	Effective Date of Data	June 30, 2021
Time Paid	July 1, 2017	June 30, 2021
Current Contract	July 1, 2017	June 30, 2021
Proposals	July 1, 2018	June 30, 2021
Multi-year base		
Work Force Dynamics	Effective Date of Data	June 30, 2021
Time Paid	July 1, 2018	June 30, 2021
Current Contract	July 1, 2018	June 30, 2021
Proposals	July 1, 2018	June 30, 2021

Effective Date: Advanced Topic

Creating Multiple Proposals

If you are entering a proposal that changes during the settlement period, but the change is in a value available only in the description dialog box, and not in the Entry dialog box, you can combine two proposals with different Effective and End dates.

For example, in your current contract, you offer a paid meal period of one hour. You want to consider a proposal in which you decrease the meal period to 1/2 hour on the settlement start date and, after one year, you cease payment for the meal period. Enter two proposals as follows:

1. Name a proposal “Meal period 1”. Do not change the default Effective Date from the first day of the upcoming settlement.
2. Change the End Date to the last day of the first year of the new settlement.
3. In the Meal Period 1 Entry dialog box, choose “Paid” in the combo box for “Time off at work.”
4. Name a second proposal “Meal period 2”.
5. In Meal Period 2, change the Effective Date to the first day of the second year of the settlement, and leave the default End Date as the last day of the upcoming settlement.
6. In the description dialog box for Meal Period 2, select “unpaid” in the “Time off at work” combo box.

You can combine the two proposals in Customize Report in Proposals and Settlements so the sum of their costs appears as a single line-item cost.

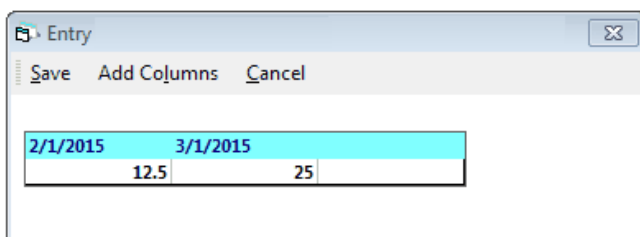
Deriving Partial Month Costs

Bargaining Power calculates costs in full-month increments, so there is no difference in the cost you obtain by entering a proposal Effective date as the first or the last day in a month. If you want to see the cost of changing an Effective date from the beginning of a month to the middle of the month, you can follow the procedures described below during proposal entry:

1. From a Proposal dialog box, select the Changes check box.
2. Choose By date from the drop-down list box.
3. Click ENTRY on the toolbar.

4. In the Entry matrix, enter the proportion equal to the proportion of the month for which you want to be effective, as the first payment amount (percentage or \$ amount). For example, if your proposal is for a 5% payment, but you want it to become effective half-way through the first month for which it is proposed, enter 2.5%.
5. Enter the next month as the first change date, and enter the full payment amount.

For example, if the Effective date of your settlement is January 1, 2015, and you want to enter a proposal for a bonus payment of \$25 per month to become effective on February 15, 2015, the Entry matrix would appear as follows:



The screenshot shows a window titled "Entry" with a close button in the top right corner. Below the title bar is a menu bar with "Save", "Add Columns", and "Cancel". The main area contains a table with two columns for dates and two columns for payment amounts. The first row has a light blue header with the dates "2/1/2015" and "3/1/2015". The second row has the values "12.5" and "25".

2/1/2015	3/1/2015
12.5	25

Note: This entry would give you the same result that you would obtain if you entered the first date as 2/1/15 or 2/28/15.

5.2.3 Enter for

Enter for allows you to specify whether the values that you enter are for:

Single Employee: Enter either the contractual value for all individual employees in the group, or the average value for individuals in the group.

Entire Group: The value is dependent on the employee count for the group. If the number of employees in the group changes over time, the value entered will be adjusted proportionately. For example, if you enter a Bonus provision of \$100,000 for the Entire Group and the selected group has 100 employees as of the Effective Date of Data; and you change the total population for the selected group to 500 in the 5th month of the base year, Bargaining Power automatically changes the Bonus amount to \$500,000 as of the 5th month of the base year.

Flat Amount per Group: The value is independent of the employee count for the group. Regardless of any changes in the size of the group population, Bargaining Power holds the value entered constant. For example, if you have negotiated the funding of an educational program at a certain annual amount of money, and the amount of money will not change even if the size of the workforce does, you would choose Flat Amount per Group.

The default for ***Enter for*** is Single employee. You can change the default for this selection in the Preferences dialog box.

5.2.4 Changes

Check this box if the information you enter in the Entry dialog box changes over time. If you select the ***Changes*** box, you are presented with a combo box to choose from among the following options:

- Annually: by Effective Date.
- By date: Enter your own dates for changes in the columns of the Entry dialog box.
- Seasonally (For more information, see the section entitled *Seasons* that follows).
- Seasonally & Annually: For multi-year entries, enter season-by-season for each year.

The default is Annually. You can change the default in the Preferences dialog box.

Seasons

When you select Seasonally, or Seasonally and Annually, as the **Change** parameter, the **SEASONS** button is activated. When you click on this button, you invoke the Seasons dialog box. You must define a season grouping before you can select it. To define a season grouping, use the following procedure:

Season Grouping: Enter the name for a new seasonal group. You are presented with a 12-column matrix, with each column representing one month of the year.

Season Names: For each component season of the group, enter a name. For example, if the Season Grouping is Turnover Seasons, Season Names might be High Turnover and Low Turnover. Check the boxes for each month in the season. Continue defining seasons until you have accounted for all 12 months. You can define up to 11 seasons in a group. Each month can be included only once in a Season Group.

If a provision or proposal is not effective during certain months of the year, you must define a season for those months so that all twelve months are included in the Season Grouping. In the Entry matrix for the Provision or Proposal, you enter zero values for the “ineffective” season.

If you operate on a quarterly basis, you can define each quarter as a season.

All standard Toolbar selections are available during season definition (**Open**, **Save**, **Add**, **New** and **Delete**).

5.2.5 Amount Per

If you are entering a dollar amount or number of hours, use the **Per** combo box to select a time period. Periods can include:

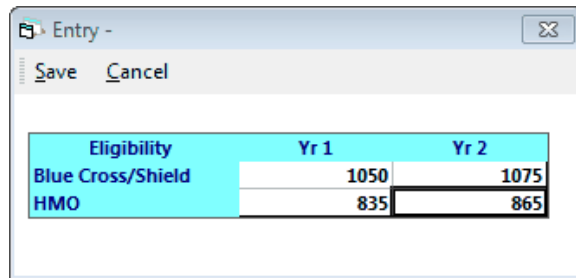
- Hour (unavailable if you are entering hours)
- Day
- Week
- Month
- Season
- Year

If you select Hour, the Time Paid matrix appears at the bottom of the description dialog box, so you can indicate which pay hours the provision or proposal includes. For more information, see Section 5.2.8, *Apply to (Time Paid Matrix)*.

The default for **Per** is the smallest increment available -- not all time increments are available in all Entry dialog boxes. You can change this in the Preferences dialog box located in the Settings section in the Bargaining Unit tab.

5.2.6 Varies by

The ***Varies by*** function appears in Provisions and Proposals description dialog boxes. This feature enables you to enter multiple values for a single group of employees. If the ***Varies by*** box is checked, a combo box appears, allowing you to choose one characteristic from your employee data base by which the Provision or Proposal values vary, such as Length of Service, or Location.



The screenshot shows a dialog box titled "Entry -" with a close button in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main area contains a table with three columns: "Eligibility", "Yr 1", and "Yr 2". The "Eligibility" column has two rows: "Blue Cross/Shield" and "HMO". The "Yr 1" column has values "1050" and "835". The "Yr 2" column has values "1075" and "865".

Eligibility	Yr 1	Yr 2
Blue Cross/Shield	1050	1075
HMO	835	865

When you select ***Varies by***, and choose an alphanumeric characteristic, the values in the data base for the characteristic are displayed in the eligibility column of the entry matrix. When you choose a numeric or date characteristic, you enter the eligibilities for the different values in the left-most column. See Section 5.2.10, *Entry*.

Note: If a Provision or Proposal varies by more than one characteristic, you can select one of them from the ***Varies by*** list. For the other variables, you must create additional groups. For more information, see the section entitled *Group Creation* in Section 5.1.1.1, *For*. You can define multiple proposals for each group, which you can combine under a single name in Customize Report in Proposals and Settlement. Choose as the ***Varies by*** characteristic the one that has the greatest number of varying values to minimize the number of proposals you have to enter.

The Bargaining Power default for *Varies by* is Length of Service. You can change this in the Preferences dialog box located in the Settings section in the Bargaining Unit tab.

Varies by: Example

You have a Bonus proposal for three technician classifications that differs by Hire Date and a characteristic called Training Level. The Training Level characteristic has three values, each of which entitles employees to differing Bonus amounts. However, the bonus amounts for each training level vary depending upon employees' hire dates, because an earlier contract provision has been grandfathered for employees hired prior to January 1, 2010.

1. From the Bonus Proposal description dialog box, enter the name for the Bonus proposal: *Bonus for New Technicians* in the Name entry field.
2. To create and select a new group of employees from the Entire Bargaining Unit, click the Ellipsis button (...). The Employee Group dialog box opens.
3. Click Create from on the toolbar. The Group Create dialog box opens.
4. Enter the name for the group: *Technicians hired after 2010* in the Group Name entry field.
5. Specify the following characteristics in the Based on entry matrix:

Characteristic	is	Value
Classification	is	Technician 1
Classification	is	Technician 2
Classification	is	Technician 3
Date of hire	is on or after	1/1/2010

6. Click Save on the toolbar. You return to the Employee Group dialog box.
7. Highlight the group you just created and click Select on the toolbar. You return to the Bonus Proposal description dialog box.
8. Check the Varies by check box, and choose Training Level from the drop-down list box.
9. Click ENTRY.
10. In the Entry matrix, enter the bonus amounts for the non-grandfathered employees in each Training Level row.
11. Enter the name for a second Bonus proposal: *Bonus for Grandfathered Technicians* in the Name entry field.
12. Create a second new group of employees called *Grandfathered Technicians* from the Entire Bargaining Unit, using the same classification criteria as above, and a hire date before January 1, 2010.
13. Once that step is complete return to the description dialog box and check the Varies by check box and choose Training Level from the drop-down list box.
14. Click ENTRY.
15. In the Entry matrix, enter the bonus amounts for the grandfathered employees in each Training Level row.

In Designing Your Report you can combine the two proposals so they appear in reports as a single line item.

5.2.7 Enter

In Pay, Benefits, and Legislated Payments, **Enter** allows you to express values as dollar amounts or percentages of pay.

You select from a combo box, as follows:

If you select *\$ amount*, the **Per** combo box is activated. Here, you enter the time period in one of the following units:

- Hour
- Day
- Week
- Month
- Year

If you select *% of pay*, the **Percentage of** combo box is activated. This selection list includes all of the pay types to which the percentage can be applied, such as Base pay, COLA, Shift Differential, etc. You can select one or more pay types.

If you are entering % of pay, Bargaining Power includes pay for all hours associated with the pay types you choose, except in the case of hours-based differentials. When you enter hours-based differentials as a % of pay, Bargaining Power derives the hourly pay for the types you choose and applies the percentage you enter for the differential to that pay for the number of hours entered for the differential itself.

The default selection is \$ amount. You can change this in the Preferences dialog box located in the Settings section in the Bargaining Unit tab.

5.2.8 Apply to (Time Paid Matrix)

When you choose Hour as your *Per* selection in a Pay, Benefit or Legislated provision or proposal, a Time Paid matrix appears at the bottom of the description dialog box.

The matrix originally appears with only Regular hours checked indicating that the dollar amount to be entered is paid for the hours in the checked cells. If you want to apply the provision or proposal to additional hours, (that are not included in the Regular hours), check those hours by clicking on the appropriate cell or using the space bar. To un-select some of the Regular hours (such as overtime or double time), click on or use the space bar to delete the check marks.

To cost a provision, Bargaining Power retrieves hours from the appropriate Time Paid matrix. To cost a proposal, Bargaining Power retrieves hours either from the Time Paid matrix in the associated base or from a time paid proposal included in the same settlement.

5.2.9 Pyramiding Option

The *Pyramiding Option* appears in hourly and percentage pay and benefit provisions and proposals. If these pay types are applied to overtime, double time or other premium (XT) time, the Pyramiding Option is active in Bargaining Power's calculations. There are three options from which you can choose:

None: Do not pay on overtime, double time or other premium hours on the provision or proposal entered. Pay it only on straight time hours..

Single Pyramiding: Pay the provision or proposal on overtime or double time or premium time hours without applying the overtime or double time or other premium factor.

Double Pyramiding: Apply the overtime or double time or other premium factor to the provision or proposal that is entered.

Pyramiding: Example

In the following example, an employee earns \$10.00 per hour, with a 5% Differential, or \$.50 hourly differential premium. The weekly differential hours are defined in the Background: Time Paid matrix for a single employee as Straight time = 5; Overtime = 2; Double Time = 1. The Pyramiding choices for the differential would result in the following calculations per employee per week:

No pyramiding: $\$0.50 \times 5$ hours, or \$2.50 -- no differential or incentive payment for overtime or double time hours.

Single Pyramiding: $\$0.50 \times 5$ hours, $\$0.50 \times 2$ hours, and $\$0.50 \times 1$ hour = \$4.00.

Double Pyramiding: $\$0.50 \times 5$ hours, $\$0.75 \times 2$ hours, and $\$1.00 \times 1$ hour = \$5.00.

5.2.10 Entry

Clicking on **ENTRY** brings up the Entry dialog box, which is tailored to fit the information that you entered in the description dialog box. The standard Entry dialog box is generated as follows:

- If you have not selected ***Changes*** or ***Varies by***, there will be a single cell for the value in the Entry dialog box.
- If you selected ***Changes*** or ***Varies by*** see the sections that follow for details.
- If both ***Changes*** and ***Varies by*** are selected, the matrix contains Change columns and Varies by rows. See the sections that follow for details.

5.2.10.1 Changes

If **Changes** is selected in the description dialog box, an Entry matrix is displayed in which the Change factors comprise the matrix columns (e.g., if the provision changes annually, there is one column for every year between the Effective and End dates of the provision or proposal).

When the Entry dialog box is itself a matrix, such as for: Time Paid, Holiday provision or proposal, and Legislated Percentage of Pay, the Change factors are available in a **Change** combo box at the top of the Entry matrix. Complete a matrix for each of the changes, and then return to the combo box to select the next change factor. Do not save the Entry dialog box until you have completed matrices for all of the changes. If the Change parameter is Annually or Seasonally the years, seasons appear in the combo box.

If the **Change** is By date, fill in the combo box with the appropriate dates. The first date that appears in drop-down combo box is the effective date. To add a new date, perform the following steps:

1. Click New. The New Date dialog box opens.
2. Enter the new date in MM/DD/YY format. You should enter the first day of a month, since Bargaining Power does not recognize mid-month dates. If you would like to enter data to calculate a partial month cost, see **To Derive Partial Month Costs** located in the *Effective Date: Advanced Topic*.
3. Click OK. The date you entered appears in the drop-down combo box in date order.

To change an existing date, perform the following steps:

1. Select the appropriate date from the drop-down comb box list.
2. Click **Modify**. The Modify Date dialog box opens.
3. Enter the new date in MM/DD/YY format. You should enter the first day of a month, since Bargaining Power does not recognize mid-month dates. If you would like to enter data to calculate a partial month cost, see **To Derive Partial Month Costs** located in the *Effective Date: Advanced Topic*.
4. Click OK.

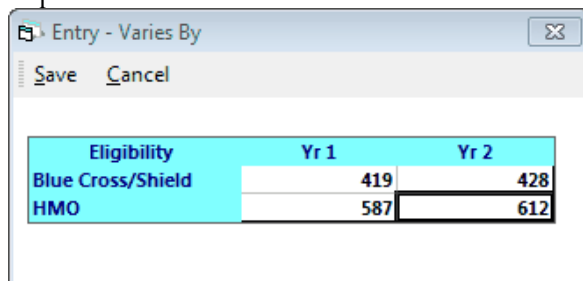
To delete a date, select the appropriate date from the drop-down comb box list and click Delete.

The Entry dialog box has **Save** and **Cancel** options. **Save** stores matrix information with the selected provision or proposal and returns you to the description dialog box. **Cancel** returns you to the description dialog box without saving the entered information.

5.2.10.2 Varies By

If ***Varies by*** is selected in the description dialog box, the values of the selected Varies by characteristics comprise the matrix rows.

If the ***Varies by*** characteristic is numeric, or is a date, enter the numbers or dates in ascending order in the



Eligibility	Yr 1	Yr 2
Blue Cross/Shield	419	428
HMO	587	612

Eligibility column of the matrix. Bargaining Power applies the values entered in the row to employees

that have greater than or equal the number or date in the Eligibility column.

If your provision or proposal ***Varies by*** Hire date, Date of birth, or Position start date, you can include employees with eligibility before a certain date. To do this, type the word BEFORE in the left-most, Eligibility column in the first row and enter the values to the right. Bargaining Power will then apply the values you enter in the BEFORE row to all employees whose date is earlier than the date you enter in the Eligibility column in the next row. For an example, see the section that follows, *Entering Varies By Dates Using BEFORE: Example*.

In a numeric field, if the first value in the Eligibility column is greater than zero, Bargaining Power assumes that employees with less than this eligibility receive nothing under the provision or proposal. If this is not the case, and such employees receive something else, the group definition should be changed, so that another proposal or provision can be entered for these employees. For more information, see the description of **Based on** in the section entitled *Group Creation* of Section 5.1.1, *For*.

If employees with greater than or equal to the final value entered in the eligibility column do not receive the proposal or provision, you can either enter a zero value for these employees, or redefine the group to exclude these employees.

For alpha-numeric characteristics chosen in *Varies by*, the Eligibility column of the Entry matrix is populated with all the values that comprise the characteristic in your employee data base. Some of these values may not apply to the group you have chosen. For example, if you are entering a provision or proposal for mechanics, and they work in only three of the four locations in which their bargaining unit operates, the fourth location will still appear in the Entry matrix when you have chosen Mechanics in the **For** definition. Leave this row blank. If you enter data in an inapplicable row, Bargaining Power will ignore it during the costing process. Entering *Varies By Dates Using BEFORE*: Example

If your provision or proposal *Varies by* Hire date, Date of birth, or Position start date, you can include any date that falls before a date you specify in the entry matrix by typing BEFORE in the first row of the Eligibility column. You must then type the date to which the BEFORE refers in the Eligibility column of the next row.

For example, assume a company offers a bonus to employees depending on their date of hire. The bonus amount varies as shown below:

Hire Date	Bonus Amount
Before 1/1/2008	\$500
Between 1/1/2008 and 12/31/2015	\$250
After 1/1/2015	\$0

The information should be entered in the Entry matrix as follows:

The screenshot shows a dialog box titled "Entry -" with a close button (X) in the top right corner. Below the title bar is a menu bar with three options: "Save", "Add Rows", and "Cancel". The main content area contains a table with a light blue header and a white body. The header row is labeled "Eligibility (MM/DD/YYYY)". The table has three rows of data, each with a date in the first column and a numeric value in the second column. The values are 500, 250, and 0, which are highlighted in blue. The table is enclosed in a black border.

Eligibility (MM/DD/YYYY)	
before	500
1/1/2008	250
1/1/2015	0

5.2.10.3 Editing the Entry Screen

To remove a row in an entry matrix of a background scenario, provision or proposal that varies by a numeric or date characteristic, place your cursor on the value you want to delete, and press Control+Delete. To insert a row, place your cursor on the value below the date or number you want to insert, and press Control+Insert. In both cases, your cursor must be placed on the value in blue.

To remove a column in an entry matrix of a background scenario, provision or proposal that changes by a date characteristic, place your cursor on the date you want to delete, and press Control+Delete. To insert a column, place your cursor on the date that follows the one you want to insert, and press Control+Insert. In both cases, your cursor must be placed on the date in blue.

6 Hours- Time Paid

In order to cost the current contract provisions and proposals, you must enter hours in the Time Paid data entry dialog box for all hourly employees and all salaried employees that are eligible for overtime, double time, or other premium time. Time paid matrices cannot be entered for Incentive Only employees. Time paid matrices are not required for salaried employees that are not eligible for overtime or double time.

In the Hours tab, select Hours to open the Time Paid dialog box. In Time Paid, you enter the number of all hours that are paid, whether for time worked or time off, excluding the number of worked holiday hours. In the Current Contract and Proposal tabs, you can distinguish between time worked and time off by describing the Time Off at Work and Time Off Away from Work provisions and proposals. For more information on entering Time Off, see *Chapter 10, Time and Workforce*.

Name: Enter the name of the scenario you are entering, up to 50 characters. You may want to enter more than one scenario or projection for Time Paid. When you cost a provision or proposal or calculate a base cost, you can select which scenario you want Bargaining Power to use.

For: Click the Ellipsis button (...) to choose the Entire bargaining unit, or any sub-group.

Effective / End date: These dates are system-generated, for information only, and cannot be changed here. They represent the period of time between the beginning of the base period and the end of the upcoming settlement.

Changes: If the hours paid change over time, check this box, and select the timing of the changes from the combo box.

Enter for: From the combo box, select Entire group or Single employee.

Hours entered per: Using the combo box select from among Day, Week, Month or Year.

Days/week: If employees in the selected group do not work 5-day weeks, you can change the amount in the Days/week entry box in Time Paid or in the Preferences dialog box.

Straight-time Multiples: You can change the default straight-time multiples for Overtime (1.5), Double time (2), and Premium time (3).

If different employee sub-groups receive different overtime, double-time or premium-time multipliers you can enter separate Time Paid scenarios or proposals for each sub-group. In each description dialog box you can specify the appropriate straight-time multiplier.

When you have completed filling in the Time Paid dialog box, click Entry on the toolbar.

Entry: The Time Paid matrix columns are made up of Straight Time, and the other earning types -- Overtime, Double time, and other Premium time, or XT -- for which the selected group is eligible, according to your entries in Classifications, in the Employee Database tab.

Matrix rows begin with Regular and are followed by the hours-based differentials for which the selected group is eligible. Hours entered for differentials may be unique, or may be included in the regular hours.

If you selected the **Changes** check box in the description dialog box, the timing of the changes you selected will appear in the combo box on the upper left hand corner of the window. If the Change parameter is Annually or Seasonally, the years or seasons appear in the combo box.

If the Change is By date, fill in the combo box with the appropriate dates. The first date that appears in the drop-down combo box is the effective date. To add a new date, perform the following steps:

1. Click New.

The New Date dialog box opens.

2. Enter the new date in MM/DD/YY format.
3. Click OK.

You return to the Entry dialog box. The date you entered appears in the drop-down combo box in date order.

To change an existing date, perform the following steps:

1. Select the appropriate date from the drop-down comb box list.
2. Click Modify.

The Modify Date dialog box opens.

3. Enter the new date in MM/DD/YY format.
4. Click OK.

To delete a date, select the appropriate date from the drop-down comb box list and click Delete.

Complete a matrix for each of the changes, and then return to the combo box to select the next change factor. Do not save the Entry dialog box until you have completed matrices for all of the changes.

For information about how to enter a Time Paid matrix for different groups of employees, see the section that follows entitled *Time Paid Entry: Example*.

Hrs Incl: This is an abbreviation for Hours Included. The check box allows you to describe your entry of Differential hours in the Time Paid Entry matrix. The Time Paid Entry matrix displays all differential types selected or named in Classifications that are hours-based. Check the ***Hrs Included*** check box on a row to indicate that the hours entered in the Time Paid matrix for a differential ARE included in the Regular hours. Do not check the ***Hrs Included*** check box on a row for a differential if the hours entered for it in the Time Paid Entry matrix are separate from and in addition to the Regular hours. For additional information, see the *Hours-Based Differentials Example* in Section 8.7.1, *Hours-Based Differentials*.

Time Paid Entry: Example

When you enter hours for differentials for which only some employees are eligible in the group for whom you are entering the Time Paid matrix, Bargaining Power will apply them differently depending upon whether you enter hours for a single employee, or for the entire group.

The example that follows is based on the following information:

- You have a bargaining unit with 500 nurses.
- 100 of those nurses are classified as Night Shift Nurses and are therefore eligible for a Shift differential.
- All employees are paid for 40 hours a week, and Night Shift Nurses are paid for 20 shift-differential hours a week.
- The shift-differential is \$1.00 per hour.

If you enter hours for a *single employee*, Bargaining Power will apply them only to those eligible for the differential.

The Time Paid description dialog box and Time Paid Entry dialog box looks like the following:

Time Paid

Open Save Add New Delete Notes Entry

Name: Average Weekly Hours

For: Entire bargaining unit

Effective: 8/1/2014 End: 7/31/2018

Enter for: Single employee

☐ Changes

Hours entered per: Week 5 Days/week

Straight-time Multiplier: OT 1.5

Entry - Average Weekly Hours

Save Cancel

	Hrs Incl	ST	Total
Regular	<input checked="" type="checkbox"/>	40	40
Shift	<input checked="" type="checkbox"/>	20	20

The shift-differential cost per week would be calculated as 20 hours x \$1.00 x 100 eligible employees, or \$2,000.

If you enter hours for the *Entire group*, Bargaining Power will divide the number by the total population of the group and apply that "per employee" number to the eligible employees.

The Time Paid description dialog box and the Time Paid Entry dialog box looks like the following:

Time Paid

Open Save Add New Delete Notes Entry

Name: Average Weekly Hours For All Nurses

For: Nurses

Effective: 8/1/2014 End: 7/31/2018

Enter for: Single employee

☐ Changes

Hours entered per: Week 5 Days/week

Straight-time Multiplier: OT 1.5

Entry - Average Weekly Hours For All Nurses

Save Cancel

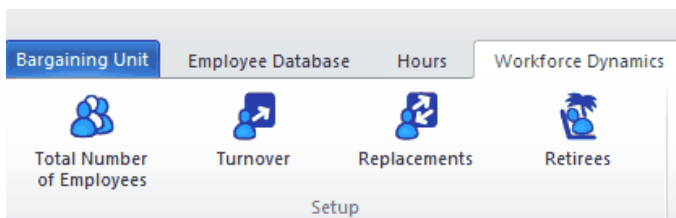
	Hrs Incl	ST	Total
Regular	<input checked="" type="checkbox"/>	20000	20000
Shift	<input checked="" type="checkbox"/>	2000	2000

Bargaining Power will derive the per employee Shift-Differential hours as 4 per week (2000/500 employees). So, when you cost the Shift Differential for Night Shift Nurses, you will obtain a weekly cost of 4 hours x 100 employees x \$1.00 or \$400.

For additional information, see Section 8.7.1, *Hours-Based Differentials: Example*.

7 Workforce Dynamics

In Workforce Dynamics, you tell Bargaining Power how to set up its dynamic simulation of your workforce as it changes over time. When you select the Workforce Dynamics tab, you have four choices:



7.1 Total Number of Employees

You can define the total number of employees for the entire bargaining unit, or any subgroup, and how that number may change over time.

Name: Enter the name of the scenario you are entering, up to 50 characters. You may want to enter more than one scenario or projection for the Total Number of Employees. When you cost a provision or proposal or calculate a base cost, you can select which scenario you want Bargaining Power to use.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Effective / End Dates: These dates are system-generated. They are for information only, and cannot be changed here.

Total number of employees as of [your Effective Date of Data]: This number is system-generated from Import or Manual Entry. It is shown for information only, and cannot be changed here.

Changes: If you expect the number of employees to change from that displayed, check this box, and select the timing of the change(s) from the combo box.

The Entry dialog box contains a single row matrix. If you select the **Changes** check box in the description dialog box the change parameters comprise the columns.

If you do not expect the total number of employees to change and you did not select the **Changes** check box, you must enter the total number of employees that you entered in the description dialog box in the single entry field in the Entry dialog box.

Total Number of Employees: Advanced Topic

The examples shown and discussed below illustrate different ways to change employee counts.

The **Data Imported** column represents the employee counts as they are imported or entered in the employee database. Scenarios 1-4 illustrate the different ways to change employee counts.

The numbers in the shaded boxes represent the total number of employees entered by the user.

You can also enter changes in the Total Number of Employees for classifications, either for every one individually, or only for those that vary from a pattern.

	Data Imported	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Clerk 1:	100	125	100	200	200
Clerk 2:	150	188	193	150	129
Clerk 3:	250	312	321	250	214
Clerk 4:	300	375	386	300	257
Total	800	1,000	1,000	900	800

Scenario 1

If you enter in Total Number of Employees for the Entire bargaining unit that on a certain date the employee count will become 1,000, Bargaining Power will automatically change the counts on that date for all classifications proportionally, as shown in the column for Scenario 1.

Scenario 2

If you enter two Total Number of Employees scenarios -- one for the Entire bargaining unit to change to 1,000; and at the same time, one for Clerk 1 to remain the same (entering a count of 100 for Clerk 1 on the same date as the change in the Entire Bargaining Unit) -- Bargaining Power will allocate the increase of 200 employees proportionally among the remaining classifications as shown in column for Scenario 2

Scenario 3

If you change the Total Number of Employees for the Entire bargaining unit and for a single classification by the same amount at the same time, Bargaining Power will not change the counts of the remaining classifications. For example, if you enter a Total Number of Employees for the Entire bargaining unit and another for Clerk 1 on the same date, increasing both by 100, Bargaining Power will automatically maintain the counts for the remaining classifications as shown in the column for Scenario 3.

Scenario 4

If you enter a change in the Total Number of Employees for a classification without changing the number of employees by the equal amount for the Entire bargaining unit, Bargaining Power will achieve the number you enter for the specified classification, and reassign employees proportionally from among the remaining classifications. If you left the total Number of Employees for the Entire bargaining unit at 800, but changed Clerk 1 to 200, Bargaining Power would decrease the remaining counts as shown in the column for Scenario 4.

7.2 Turnover

Use the Turnover description dialog box to describe how employees leave the workforce or a particular employee group over time.

Name: Enter the name of the scenario you are entering, up to 50 characters. You may want to enter more than one scenario or projection for Turnover. When you cost a provision or proposal or calculate a base cost, you can select which scenario you want Bargaining Power to use.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Note: There is no ***Vary by*** option in Turnover. If turnover varies by length of service, or age, or any other characteristic in your employee database, you can create the appropriate population in the ***For*** dialog box. For more information, see *Group Creation* in Section 5.1.1, *For*.

Effective / End Date: These dates are system-generated, for information only, and cannot be changed here.

Attrition/Retention: Select from the combo box whether turnover is expressed as Attrition (employees that leave) or Retention (employees that stay).

Changes: If you expect the number of employees to change over time check this box and select the timing of the change(s) from the combo box.

Amount expressed as: Select how you will describe Attrition or Retention. Your options are Percentage or Number.

per: Indicate whether the number or percentage you enter is a monthly or annual one.

Once you have completed the Turnover description dialog box, click Entry on the toolbar.

The Entry dialog box contains a single row matrix. If you made ***Change*** selections in the description dialog box, they comprise the columns.

7.3 Replacements

In Replacements, you indicate that employees who leave are replaced by new hires in order to achieve or maintain the designated Total Number of Employees in light of the designated Turnover. You also describe how employees may be laid off in the case of a decline in the total number of employees.

Name: Enter the name of the scenario you are entering, up to 50 characters. You may want to enter more than one scenario or projection for Replacements. When you cost a provision or proposal or calculate a base cost, you can select which scenario you want Bargaining Power to use.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Date: These dates are system-generated, for information only, and cannot be changed here.

Decline in the total population is achieved through: Select whether you wish to achieve a decline in total population either through unreplaced attrition or through layoffs.

Unreplaced attrition only: If your labor agreement does not allow layoffs, check Unreplaced attrition only.

If this box is checked, any decline in the population that you entered in Total Number of Employees is treated as a goal to be reached as turnover allows. The Bargaining Power simulation model will not lay off employees to achieve the total number of employees. If you select this box, the Layoffs check box is grayed out and is not available for selection. See the *Unreplaced Attrition Example* for additional information.

Layoffs: Check this box if a decline in the total population can be achieved through laying off employees in the group for which you are entering data. In the dropdown box, you can determine whether employees are laid off in reverse seniority or uniformly.

Unreplaced Attrition Only: Example

The following is an example of how Bargaining Power treats Workforce Dynamic entries when you select Unreplaced Attrition in the Replacements dialog box.

- As of the Effective Date of Data, Classification A has 200 employees.
- In Total Number of Employees, you indicate that as of contract month 6, the population of Classification A is 175.
- In Turnover, you enter a 12% annual attrition rate for Classification A.
- In Replacements, you select "Unreplaced Attrition Only" for Classification A.

Bargaining Power’s simulation attains the 175 employee count in contract month 15, despite the instructions in Total Number of Employees, because it takes 9 months, beginning in month 6, for the goal of a decline in population to 175 to be reached solely through unreplaced attrition.

The employee counts will be achieved as follows:

Month	Employee Count
-------	----------------

5	200
6	197
7	195
8	192
9	190
10	187
11	185
12	182
13	180
14	177
15	175

7.4 Retirees

Workforce Dynamics, Retirees is intended for users whose retiree benefit contributions are a function of the number of living retirees they cover.

Workforce Dynamics, Retirees enables Bargaining Power to simulate the changes in the number of retirees based on the proportion of employee turnover that becomes retirees and the mortality rates of the retiree population.

Workforce Dynamics, Retirees and Benefits, Retiree Benefit Contributions is not intended for use for such contributions that are set by month or year or of any characteristic of active employees.

If you enter Retiree Benefit provisions or proposals you must enter a Workforce Dynamics Retirees scenario and enter the provision or proposal in Benefits, Retiree Benefit Contribution. For more information on entering Retiree Benefit Contribution provisions or proposals, see Section 9.7, *Retiree Benefit Contribution*.

Name: Enter the name of the scenario you are entering, up to 50 characters. You may want to enter more than one scenario or projection for Retirees. When you cost a provision or proposal or calculate a base cost, you can select which scenario you want Bargaining Power to use.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset from which retirees are drawn.

Effective / End Date: These dates are system-generated, for information only, and cannot be changed here.

Total number of Retirees as of [your Effective date of data]: In this field, you enter the number of living retirees for whom benefit contributions are made as of the effective date of the data.

Mortality expressed per: From the combo box, select month or year to indicate how retirees' mortality rates will be entered.

Retirement and mortality changes: Check this box if you project that retirement as a percentage of turnover or retiree mortality rates will change over time. Select a time from the combo box.

The screenshot shows two overlapping windows. The main window is titled 'Retirees' and contains the following fields:

- Name: Retiree Population Projection
- For: Entire bargaining unit
- Effective: 8/1/2014
- End: 7/31/2018
- Total number of retirees as of 7/31/2014: [empty]
- Mortality expressed per: [empty] year
- ☐ Retirement and mortality changes

The 'Entry - Retirees' sub-dialog is open, showing a table with the following data:

% of attrition	25
Mortality %	8

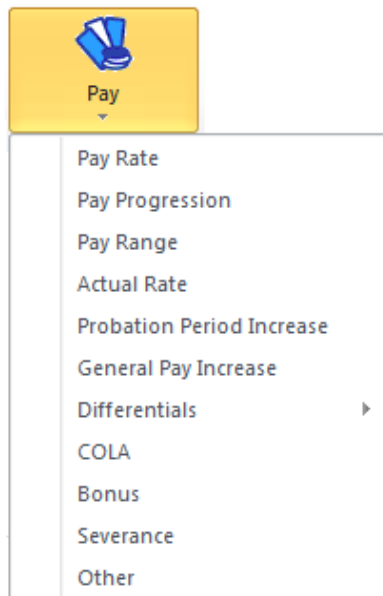
In the Entry dialog box, the columns represent the change factors. The rows define the following:

- **% of attrition:** This value indicates the percentage of employees that leave the workforce due to retirement. This information enables the Bargaining Power simulation to add new members to the retiree population over time.
- **Mortality %:** This value indicates the mortality rate of the total retiree population. This information enables the Bargaining Power simulation to reduce the number of retirees over time.

8 Pay

Overview

Bargaining Power's Pay types are:



Pay Rate: Pay rates set for employee groups, or entered as average rates for members of each employee group. Pay Rates, along with General Pay Increases, are components of employee Base Pay.

Pay Progression: Pay plans by which employees receive increases based on their length of service anniversaries; one component, along with General Pay Increases, of employee Base Pay.

Pay Range: Compensation plans in which on certain dates, individuals' pay rates are adjusted depending on the relationship between their actual pay and a maximum rate for their position.

Actual Rate: The Actual Rate entry enables you to cost the current contract without entering the rules for pay you negotiate. Bargaining Power uses the Actual rate imported from the employee database file to determine pay.

Probation Period Increase: Pay increases that occur upon the completion of a probation period; included in employee Base Pay.

Differentials: Payments made to employees based on particular work assignments, schedules, events such as weather or hazard, or characteristics of particular employees, such as training, seniority, certification, etc.

COLA: Cost-of-living adjustments tied to the behavior of an external economic index.

Incentives: Payments tied to productivity or the behavior of an internal index, such as commission, piece rates, profit sharing, etc.

Bonus: Payments, typically not rolled into Base Pay, including lump-sum pay increases.

Severance: Payments made to employees who are laid off during the base or settlement period.

Other: Pay provisions or proposals users can enter that do not fit the descriptions above.

Each section describing the pay types above includes a list of commonly used synonyms, since names for pay components vary among different industries and organizations. Commonly used synonyms to Bargaining Power terms are also listed in the index.

8.1 Pay Rates

Pay Rates provisions and proposals define the pay (hourly or salary) for a group of employees. Along with Pay Progressions, and General Pay Increases, Pay Rates comprise what Bargaining Power calls Base Pay, or pay exclusive of differentials, incentives, or bonuses.

Pay Rates may also be called hourly rates, wage rates, basic compensation rates, salary rates, job rates or salary schedules. You must define either a Pay Rate or a Pay Progression for all employee groups whose work status is not Incentive-only before Bargaining Power can calculate a base cost.

To enter a general wage increase that occurs in the final year of the current agreement, or the base year, you can enter the pay rate changing over time, and select the timing of the increases. For more information, see Section 5.2.4, *Changes*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a Pay Rate changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if the pay rates vary by a characteristic in your employee database, then select the characteristic from the combo box.

Note: When you define Pay Rates, Length of Service and Position Length of Service are not

available characteristics for ***Varies by***. If a Pay Rate varies by one of these, enter it as a Pay Progression. Hire Date and Position Start Date are available ***Vary by*** characteristics for Pay Rates. For more information see Section 8.2.1, *Pay Rates vs. Pay Progressions*.

Amount per: Select from the combo box whether the pay rate is expressed per:

- Hour
- Day
- Week
- Month
- Year

Apply to: If you choose Hour in ***Amount per***, the Time Paid matrix is displayed. Check the hours to which the pay rate applies.

If the numbers of hours you enter in differential rows in the Time Paid matrix are included in the hours you enter in the Regular row, do NOT check the differential hours here, or the pay rate will be applied to these hours twice.

If the differential hours are not included in regular hours, you can either:

- Check the differential hours here and exclude the Pay Rate component of differential pay in the entry of the differential amounts; or
- Do not check the differential hours here and include the Pay rate component of the differential pay in the entry of the differential amount.

For additional information, see Section 8.7.1, *Hours-Based Differentials*.

Pay Rates Entry

Enter the Pay Rate amounts in the matrix created based on the information you provide in the Pay Rates description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

8.2 Pay Progressions

Pay Progressions are pay plans in which individual employees receive increases based on their own employment anniversaries. These anniversaries may be based on Length of Service (derived from hire dates entered in your employee database) or Position Length of Service (derived from position start dates entered in your employee database). Along with Pay Rates and General Pay Increases, Pay Progressions comprise what Bargaining Power calls Base Pay, or pay exclusive of differentials, incentives, or bonuses.

Pay Progressions can also be referred to as apprentice rates, salary increments, salary steps, pay schedules, pay increments, progression steps, wage progressions, base compensation step rates, and automatic increments. You must define either a Pay Progression or a Pay Rate for all employee groups whose work status is not Incentive-only before Bargaining Power can calculate a base cost.

To enter a general wage increase that occurs in the final year of the current agreement, or the base year, you can enter the pay progression changing over time, and select the timing of the increases. For more information, see Section 5.2.4, *Changes*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a Pay Progression changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Increases on: If you entered both Hire Date and Position Start Date in your employee database, select the date on which the progression increase is based.

Enter: Using the combo box, select from the following options how you will describe the Pay Progression.

Pay rate: Enter the actual pay rates for each anniversary. See *Pay Progression Entry* for details.

\$ increase: Enter a hire rate and the dollar-amount increase paid on anniversaries. Increases are understood to be over the rate employees are earning at the time -- not over the hire rate. See *Entering a Pay Progression as a \$ or % increase: Example* for details.

% increase: Enter a hire rate and the percentage increase paid on anniversary dates. Increases are understood to be over the rate employees are earning at the time -- not over the hire rate. See *Entering a Pay Progression as a \$ or % increase: Example* for details.

\$ below top rate: Enter a top rate and the dollar-amount below the top rate paid on anniversaries. See *Entering a Pay Progression With a Top Rate: Example* for details.

% below top rate: Enter a top rate and the % below the top rate paid on anniversaries. See *Entering a Pay Progression With a Top Rate: Example* for details.

% of top rate: Enter a top rate and the % of the top rate paid on anniversaries. See *Entering a Pay Progression With a Top Rate: Example*.

The table below illustrates how the same Pay Progression would be entered, depending on which choice above is selected.

Eligibility in months	Pay Rate	\$ Increase	% Increase	\$ Below Top Rate	% Below Top Rate	% of Top Rate
0	\$10.00	\$10.00	\$10.00	\$2.00	16.7%	83.3%
6	\$10.50	\$0.50	5%	\$1.50	12.5%	87.5%
12	\$11.00	\$0.50	4.76%	\$1.00	8.3%	91.7%
24	\$12.00	\$1.00	9.09%	\$12.00	\$12.00	\$12.00.

Per: Select from the combo box the time period associated with the Pay Progression dollar amounts:

- Hour
- Day
- Week
- Month
- Year

Hire or Top rate varies by: If you select \$ increase or % increase from the **Enter** combo box, you can vary the Hire Rate based on a characteristic in your employee database. If you select \$ below, % below or % of top rate, you can vary the Top Rate. If you select Pay Rate, the **Hire/Top Rate varies by** check box is grayed and unavailable to you.

You can vary the Top or Hire Rate by any characteristic in your employee database, except Length of Service or Position Length of Service, since these characteristics are automatically considered in a Pay Progression. Enter the Hire Rate as the amount for zero Length of Service eligibility, or enter the Top Rate as the amount for the progression's final Length of Service eligibility.

To enter a Hire or Top Rate that varies, or to enter a single title or Top Rate when the progression is entered as anything except Pay Rates, select **Hire rate** or **Top rate** on the Toolbar. This invokes an Entry matrix, in which the rows represent the values of the characteristic by which the rate varies. If you check **Changes**, the columns represent the timing of the changes. If the Hire or Top Rate does not vary, and Changes is not selected, the Entry area is a single cell.

☒ Top rate varies by Location

Apply to:

	ST	OT
Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Entry - Top Rate

Save Cancel

Eligibility	
New York	10.20
Connecticut	10.15
Vermont	10.35
Rhode Island	10.40
New Jersey	10.45
Delaware	10.25

If a Pay Progression -- i.e., the increase amounts or anniversary dates, as opposed to the Hire or Top Rates-- varies, you must define multiple Pay Progression provisions or proposals. You do this by creating subgroups based on the characteristic by which the progression varies.

For example, if your bargaining unit includes three locations, and the Pay Progression increase amounts or anniversaries for a group of employees vary by location, you would enter three Pay Progressions, one for each location. However, if the amount received and the Length of Service anniversaries remain the same, and only the Top or Hire rate varies by location, you can enter a single provision or proposal for the group by indicating that the hire or top rate varies by location.

Apply to: If you choose Hour in *Amount per*, the Time Paid matrix is displayed. Check the hours to which the Pay Progression applies.

If the numbers of hours you enter in Differential rows in the Time Paid matrix are included in the hours you enter in the Regular row, do NOT check the Differential hours here, or the Pay Rate will be applied to these hours twice.

If the differential hours are not included in regular hours, you can either:

- Check the Differential hours here and exclude the Pay Progression component of differential pay in the entry of the differential amounts; or
- Do not check the Differential hours here and include the Pay Progression component of the differential pay in the entry of the Differential amount.

For additional information, see Section 8.7.1, *Hours-Based Differentials*.

Pay Progression Entry

In the Pay Progression Entry matrix, enter the anniversaries on which employees receive increases in the left-hand, Eligibility column and enter the amount received in the right-hand column. If you select **Changes**, the columns comprise the timing of the changes.

If the Pay Progression is entered as a Pay Rate enter a zero in the Eligibility column of the first row, as the Length of Service at hire and enter the rate at which the progression begins, as shown in the example that follows.

The screenshot shows two overlapping windows from a software application. The main window is titled "Pay Progression Provision" and contains the following fields and options:

- Name:** Pay Progression Provision
- For:** Entire bargaining unit
- Effective:** 4/1/2018 **End:** 3/31/2022
- ☐ Changes
- ☒ Increases on: Length of service
- Enter:** Pay rate per Hour
- ☐ Top rate varies by
- Apply to:**

	ST	OT	DT
Regular	✓	✓	✓
Shift			

The second window, titled "Entry - Pay Progression Provision", is open over the main window and shows a table with two columns: "Eligibility (Months)" and a numerical value. The table contains the following data:

Eligibility (Months)	
0	10.00
6	11.00
12	11.50
24	12.00

Entering a Pay Progression With a Top Rate: Example

If the Pay Progression is entered as a % of top rate, % below top rate, or \$ below top rate, Top rate on the Pay Progression toolbar becomes available to you. In the Entry matrix you enter the eligibility or timing on which the top rate is achieved, and you enter the Top rate in the Top rate entry cell.

In the following example employees receive a % of 20.00, which is the top rate, every 6 months.

- 1. Complete the Pay Progression description dialog box as follows:

Pay Progression Provision

OpenSaveAddNewDeleteNotesTop RateEntry

Name:Pay Progression entered as a % of Top Rate

For:Entire bargaining unit

Effective:4/1/2018End:3/31/2022

☐ Changes

☒ Increases onLength of service

Enter:% of top rateperHour

☐ Top rate varies by

Apply to:

	ST	OT	DT
Regular	✓	✓	✓
Shift			

- 2. Click Top Rate that appears on the Pay Progression toolbar and enter the Top Rate in the Entry cell.

Entry - Pay Progression entered as a % of Top Rate

Save Cancel

Enter value:

3. Click Entry that appears on the Pay Progression toolbar. In the left-hand column enter the timing in which the progression percentages are achieved and enter the actual percentage in the right-hand column. Enter the timing that the top rate is received but leave the entry cell blank.

Entry -

Save Add Rows Cancel

Eligibility (Months)	
0	80
6	85
12	90
18	95
24	

Entering a Pay Progression as a \$ or % Increase: Example

If the Pay Progression is entered as a \$ increase or a % increase Hire rate on the Pay Progression toolbar becomes available to you. In the Entry matrix enter the eligibility or timing on which the hire rate is achieved and enter the Hire rate in the Hire rate entry cell.

In the following example, employees are hired at \$10.00 and receive a \$0.50 increase after 12 months of service, a \$0.75 increase after 24 months and a \$1.00 increase after 36 months of service.

1. Complete the Pay Progression description dialog box as follows:

Pay Progression Provision

Open Save Add New Delete Notes Hire Rate Entry

Name: Pay Progression entered as a \$ increase

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

☐ Changes

☒ Increases on Length of service

Enter: \$ increase per Hour

☐ Hire rate varies by

Apply to:

	ST	OT	DT
Regular	✓	✓	✓
Shift			

Click Hire rate that appears on the top of the Pay Progression toolbar and enter the Hire rate in the Entry cell:

Entry - Pay Progression entered as a \$ increase

Save Cancel

Enter value:

- Click Entry that appears on the Pay Progression toolbar. In the left-hand column enter a zero for the hire rate eligibility and leave the entry cell blank. Then enter the timing on which the \$ increase is received and enter the actual amount of the increase.

Entry - Pay Progression enter...

Save Add Rows Cancel

Eligibility (Months)	
0	
12	.50
24	.75
36	1.00

8.2.1 Pay Rates vs. Pay Progressions

Frequently, employee groups are paid through a Pay Progression only during an initial employment period, which is the period that ends with the final Length of Service eligibility for progression increases. Following this anniversary, employees receive pay increases solely through changes in Pay Rates, and are no longer considered to be "in" the Pay Progression.

To differentiate between these subgroups (those in the progression, and those no longer in the progression), you can create two subgroups using **For**, based on Length of Service or Position Length of Service. Create the first subgroup based on a Length of Service less than the maximum for the Pay Progression. Enter a Pay Progression for this group. Create a second subgroup based on a Length of Service greater than or equal to the maximum. Enter a Pay Rate provision or proposal for this subgroup.

The second subgroup's Pay Rates may vary depending on the number of pay increases they have received since leaving the progression. You can either enter a single pay rate, representing the average Pay Rate for the group, or you can vary the Pay Rate by Hire Date or Position Start Date, and enter the actual rates as they have been affected by prior General Pay Increases or changes.

If you choose the latter option, remember to include a Hire Date late enough to accommodate employees who automatically enter the subgroup during the base or settlement period as they exceed the maximum Length of Service eligibility for the Pay Progression subgroup.

If you choose to enter the Pay Rate for these longer-service employees as a single, average amount, you can actually avoid entering a second provision or proposal by including them in the Pay Progression. You can enter the length of service eligibility for the employees out of the progression, and enter the average rate as though it were the final rate in the Pay Progression.

8.3 Pay Ranges

Pay Ranges are compensation plans that adjust employees' individual pay rates based on those rates' relationships to rules you enter. To enter Pay Ranges, you must import an Actual Rate field. For more information, see Section 3.1.1, *Database Definition*.

You must enter for each date on which you adjust the pay a maximum for the pay range, and an increase to grant employees who have not reached the maximum. You may also enter a minimum for the range and a threshold. Each of these entries and how they are applied is described below.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own Effective and End Dates.

Changes: If you will enter changes to the range increase, maximum, minimum (if selected below) or threshold (if selected below) choose here whether those changes are annually or on specific dates you will enter.

Enter increase: \$ amount or percentage of pay or, when you indicate that the provision or proposal changes over time, you can select both. If you choose both, the entry matrix will include a row in which you identify each increase as either a percentage or a \$ amount. **\$ amount/% of pay:** On the date you specify, employees who are not earning the maximum receive this increase or the portion of this increase that raises them to the maximum.

Maximum: Enter the dollar amount of the maximum on the date of the increase. Employees that earn more than the maximum do not receive the Pay Range increase. The maximum must be entered as an hourly dollar amount.

Minimum: Check this box if the Pay Range rule includes a minimum pay rate for the position. All employees will be raised to the entered minimum, even if that requires them to receive an increase greater than the entered \$ or % increase. The minimum must be entered as an hourly dollar amount.

Enter Threshold: Enter the amount of money employees may receive above the specified increase to “top them off” so they reach the maximum. For example, if an employee earns \$18.00 per hour and the increase is \$0.75, and the maximum is \$18.80, the employee would receive \$0.75 on the date of the adjustment. However, if you enter a threshold of \$0.05, the employee will receive \$0.80 to move him or her to the \$18.80 maximum.

Apply to: If you choose Hour in *Amount per*, the Time Paid matrix is displayed. Check the hours to which the Pay Range is applied.

Pay Range Entry

Enter the range increase and the maximum, and, if applicable, the minimum and threshold. All dollar amounts are hourly.

Replacements Discussion: When employees enter a group paid with a Pay Range, either as replacements for turnover or due to an increase in headcount, the

simulation maintains the percentage distribution of pay that was in the Actual Pay field. To conduct the Pay Range costing, Bargaining Power creates subsets of employees in groups created using the minimum Actual Pay rate and adds increments of the smallest Pay Range increase entered. The pay for each of these subsets is determined by the average of their Actual Pay rates.

If employees hired after the effective date of data are to be paid differently from what is described above, you must apply the Pay Range to a subset you create using the hire date field, and then create a subset hired on or after that date to receive a Pay Rate which you can change during the base and settlement periods.

If a General Pay Increase varies by an employee characteristic, it cannot be applied to a Pay Range. The interaction between the General Pay Increase and Pay range, in this case can only be “Do not apply” and none of the check boxes below “Do not apply” can be used.

Entering a Pay Range: Example

If the employee database includes Actual Pay rates that range from \$22.00 to \$42.00 per hour, and the smallest increase offered in the Pay Range entry is \$2.00, employees are grouped in ten sets (between \$22.00 and \$24.00; between \$24.00 and \$26.00; between \$26.00 and \$28.00; etc.). The software, however “pays” each of the ten sets the average of the actual pay earned by employees in each of the sets. So, for example, if there are 35 employees that have actual rates between \$24.00 and \$26.00 but 30 of them actually earn \$25.99 and the remainder earn \$24.00, \$24.50, \$25.00, \$25.50 and \$25.75, the software will “pay” all 35 \$25.84, the actual average of the group. Any new employees that are added to the group will be brought in to the group such that the same proportion earn between \$24 and \$26, and the number brought into the set that earns between \$24.00 and \$26.00 will be paid \$25.84 until the next Pay Range increase. In the Pay Scatter benchmark,

the software will show the actual average of the group described above (\$25.84), and display the number of employees that comprise the average (10).

Pay Range and Pay Scatter: Advanced Topic

When a subset of employees is selected (or included in a group that is selected) for the Pay Scatter benchmark statistic, you can choose to show each unique rate or set a range to show the number of employees whose pay falls within that increment. For more information see Section 12.4.1, *Benchmark Statistics*.

8.4 Actual Rate

Actual Rate allows you to cost the current contract without entering the rules for pay. This is valuable when you are not analyzing changes to pay structures or when you want to obtain a quick answer without entering payment rules for different employee groups.

You may also want to use this feature in an iterative analysis to discover how operational or hiring practices may differ from contractual rules. For example, if you “hire for experience,” or hire employees as required by the exigencies of local labor markets, you may want to measure the difference between actual pay practices and those described in the contract. You can run one base cost report using Actual Rate, and then run a second one using the contractual rules. By comparing these results, you can calculate a percentage or dollar difference that you can enter in the software as a differential.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own Effective and End Dates.

Apply to: Check the hours to which the Actual Rate is applied.

There is no entry screen for Actual Rate. The actual, hourly pay rates are obtained from the employee database file.

Actual Rate is not available as a proposal. However, general pay increases and other pay proposals that affect employees' base pay do interact with the Actual Pay employees receive in the Current Contract tab.

8.5 Probation Period Increase

In Bargaining Power, Probation Period Increases, plans by which employees receive a pay increase when they have completed their probation period, are similar to Pay Progressions, except that they only have a single step or anniversary date. Probation Period Increases are valid only for groups of employees whose base pay is a Pay Progression.

You cannot enter a Probation Period Increase for employee's who have a Pay Rate. If you try to combine a Pay Rate and a Probation Period Increase for the same group the Probation Period Increase will be cost as zero. You can either create two pay rates for employees with different lengths of service or create a pay progression reflecting the hire rate and the Probation Period Increase. For more information, see Section 8.5.1, *Probation Period Increases and Pay Rates*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own Effective and End Dates.

Changes: If the probation period increase changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Increases on: If you entered both Hire Date and Position Start Date in your employee database, select the date on which the Probation Period Increase is based.

Enter: Describes how the Probation Period Increase is expressed. Select from one of the following options:

Pay rate: Enter the actual pay rate paid upon completion of the probation period.

\$ increase: Enter the dollar-amount increase paid at the completion of the probation period.

% increase: Enter the increase as a percentage of the Hire Rate paid at the completion of the probation period.

Bargaining Power locates the Hire Rate for the employee group by using your Pay Progression provision or proposal entry. If the Pay Progression is related to a Top Rate, Bargaining Power derives the appropriate Hire Rate from the Pay Progression entry.

Interaction with Pay Progression: Bargaining Power offers two options for the interaction between the Pay Progression and the Probation Period Increase, Both are paid and Advance on progression.

Both are paid: Pay progression increases are paid in addition to the probation period increase.

Advance on progression: Treat the Probation Period Increase as a lump-sum increase, or an advance on the Pay Progression increase that follows it. For more information, see *Interaction Between Probation Period Increases and Pay Progressions: Example* in the section that follows.

If you entered the Pay Progression as a pay rate, as opposed to a \$ increase, % increase, etc., Bargaining Power will always treat the Probation Period Increase as an Advance on the progression.

Apply to: If you choose Hour in *Amount per*, the Time Paid matrix is displayed. Check the hours to which the Probation Period Increase is applied.

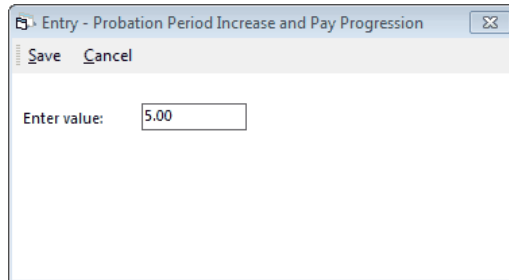
Probation Period Entry

The left-most column in the Probation Period Increase is used for the anniversary of the completion of the probation period. If you select *Changes*, the additional columns represent the timing of changes. Only one row may be entered. If increases are paid on more than one employment anniversary, enter the provision as a Pay Progression rather than a Probation Period Increase.

Interaction Between Probation Period Increases and Pay Progressions: Example

A Pay Progression is entered as \$ increase as follows:

1. Enter the hire rate, \$5.00, in the Entry dialog box.

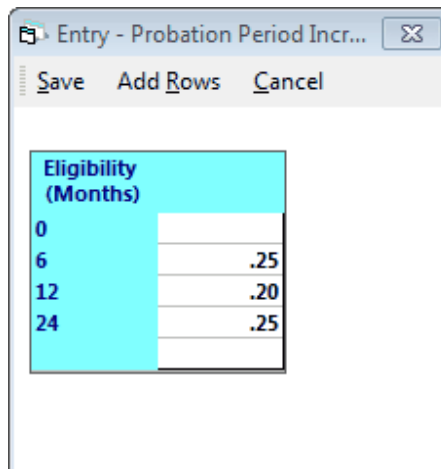


Entry - Probation Period Increase and Pay Progression

Save Cancel

Enter value: 5.00

2. Enter the pay progression in the Pay Progression Entry matrix.



Entry - Probation Period Increase and Pay Progression

Save Add Rows Cancel

Eligibility (Months)	
0	
6	.25
12	.20
24	.25

3. Enter a Probation Period Increase as \$ increase as follows:

The screenshot shows a software window titled "Entry - Probation Period Incr...". It has a menu bar with "Save", "Add Rows", and "Cancel". Below the menu bar is a form with a label "Eligibility (Months)" in a blue box. The form contains two input fields: the first contains the number "3" and the second contains the value ".10".

3. Depending on the choice made in Interaction with Pay Progression, Bargaining Power calculates the pay rates as follows:

Anniversary Progression (in months)	Both are paid	Advance on Progression
0	\$5.00	\$5.00
3	\$5.10	\$5.10
6	\$5.35	\$5.25
12	\$5.55	\$5.45
24	\$5.80	\$5.70

8.5.1 Probation Period Increases and Pay Rates

If you have a Probation Period Increase for employees whose base pay is a Pay Rate, you can enter the information for the Pay Rate and the Probation Period Increase in one of the following ways:

You can enter two Pay Rates, one for employee's with a Length of Service less than (<) the Period Increase anniversary date, and one with a Length of Service greater than or equal to (>=) the anniversary date. See *Entering a Probation Period Increase as a Pay Rate*.

You can create a Pay Progression reflecting the hire rate and the Probation Period Increase. See *Entering a Probation Period Increase as a Pay Progression*.

Entering a Probation Period Increase as a Pay Rate

You can enter two Pay Rates, one for employee's with a Length of Service less than (<) the Period Increase anniversary date, and one with a Length of Service greater than or equal to (>=) the anniversary date.

In the following example, employees with less than 3 months of service receive \$8.00 per hour, after 3 months of service they receive \$10.00 per hour.

To enter this as a Pay Rate, perform the following steps:

1. From Pay Rate, create one subgroup with a Length of Service less than (<) the Period Increase anniversary date.

2. Enter a Pay Rate for the employees with Length of Service before the Probation Period Increase with the Pay Rate amount as the hire rate.

The screenshot shows two overlapping windows from a payroll system. The background window is titled "Pay Rate Provision" and contains the following fields and options:

- Name:** \$8.00 Pay Rate
- For:** Length of Service less than 3 months
- Effective:** 4/1/2017 **End:** 3/31/2021
- ☐ Changes
- ☐ Varies by
- Amount per:** Hour
- Apply to:**

	ST	OT	DT
Regular			
Shift	✓	✓	✓

The foreground window is titled "Entry -" and contains:

- Save** **Cancel**
- Enter value:** 8.00

3. Create a second subgroup with a Length of Service greater than or equal to (\geq) the anniversary date.
4. Enter a Pay Rate provision for employees with Length of Service after the Probation Period Increase anniversary with the Pay Rate amount as the hire rate plus the probation period increase.

Entering a Probation Period Increase as a Pay Progression

Enter both the Pay Rate and the Probation Period Increase as a Pay Progression.

In the following example, employees with less than 3 months of service receive \$8.00 per hour, after 3 months of service they receive \$10.00 per hour.

To enter this as a Pay Progression, perform the following steps:

- 1. From Pay Progression, enter the Pay Progression provision for the Entire bargaining unit.
- 2. Select the Varies by check box and select Length of Service from the drop-down list box.
- 3. Click Entry and enter the timing on which the hire rate and increases are received and enter the amounts received.

Pay Progression Provision

Open Save Add New Delete Notes Top Rate Entry

Name: Pay Progression

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

☐ Changes

☒ Increases on Length of service

Enter: Pay rate per Hour

☐ Top rate varies by

Apply to:

	ST	OT	DT
Regular	✓	✓	✓
Shift			

Entry -

Save Add Rows Cancel

Eligibility (Months)	
0	8
3	10

8.6 General Pay Increase

General Pay Increases are pay increases available to all eligible employees on fixed dates. They can also be referred to as wage increases, across the board increases, general wage increases, pay increases, salary increases, raises, standard wage increases, etc. Note that if you enter a General Pay Increase in a multi-year base with increases during the settlement period, and then you enter a General Pay Increase proposal, the costs for the proposal will be the difference between the proposal and the provision. In other words, if you have entered a General Pay Increase provision of \$2.00 per hour annually in a base, and you cost an annual General Pay Increase proposal with annual increases of \$3.00 per hour, the cost for the proposal will be the difference between a \$3.00 general pay increase and a \$2.00 general pay increase.

If a General Pay Increase is a lump-sum payment, which is not rolled into Base Pay, it should be defined as a Bonus in Bargaining Power.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: The default dates are the beginning and end of the settlement duration, but you can override them and enter your own effective and end dates.

Changes: If there is more than one General Pay Increase during the settlement period, check **Changes** and select the timing of the increases from the combo box. You can select either Annually or By Date.

If you do not check **Changes**, it is assumed that the General Pay Increase occurs on the Effective Date of the proposal.

Varies by: Check this box if the amount of the General Pay Increase varies by a characteristic in your employee database, then select the characteristic from the combo box.

If you choose Length of service or Position length of service as the ***Vary by*** characteristic, Bargaining Power will pay the General Pay Increase to employees who have achieved the eligibility as of the date of the General Pay Increase.

Enter: Select from the combo box whether you enter the pay increase as a \$ amount or as a % of pay, or when you indicate that the provision or proposal changes over time, you can select both. If you choose both, the entry matrix will include a row in which you identify each increase as either a percentage or a \$ amount.

If you select \$ amount, enter the increase(s) above the pay employees receive as of the increase date. In the ***per*** combo box, choose the time period for the \$ amount you enter.

If you select % of pay, choose from the ***Percentage of*** combo box the components of pay, in addition to Base Pay, to be included as the base for the % increase. Base Pay is automatically included, and cannot be excluded.

Note: Base Pay includes a Pay Progression, Pay Rate or Actual Rate and the previous General Pay Increases. If General Pay Increases are not rolled into Base Pay, i.e., if they are lump-sum increases, they should be entered in the Bonus category.

Multiple General Pay Increase percentages are assumed to be compounded. If you wish to enter them otherwise, use the Bonus category, and enter the percentages additively. Percentage increases are applied to the base rate as increased by previous dollar amount increases when you enter both percentages and dollar amounts.

For example, if an employee group has a Pay Rate of \$10.00 per hour and you enter General Pay Increases of 3% and 3% that changes by date, Bargaining Power pays the employees \$10.30 on the date of the first General Pay Increase, and \$10.61 on the date of the second. If you do not want the second 3% increase to be compounded on the first, enter a Bonus provision, as a % of pay, which changes by date. On the first date, enter 3% and on the second date enter 6%. This results in pay of \$10.30 on the first date and \$10.60 on the second.

Interactions with Pay Progressions: If the selected employee group is paid through a Pay Progression, check this box, and choose how the Pay Progression and the General Pay Increase interact from the combo box. See *Interaction Between General Pay Increases and Pay Progressions: Example*.

- **Both are paid:** If you select this option, on the day of the General Pay Increase, all pay rates in the progression are increased by the amount of the General Pay Increase.
- **Advance on next Pay Progression:** Selecting this option causes the General Pay Increase to be treated as an advance on the next Pay Progression increase, so that although the pay rates within the Pay Progression remain the same, employees in the progression receive the General Pay Increase on its effective date, and then continue through the existing progression.

Interactions with Pay Range: If the selected employee group is paid through a Pay Range choose how the Pay Range and the General Pay Increase interact from the combo box. For more information, see Section 8.3, *Pay Range*.

- **Do Not Apply:** If you select this option the general pay increase will not be given to employee's whose base pay is defined as a Pay Range.
- **Apply only to employees who have**

reached the maximum: If you select this option the general pay increase will only be given to employee's who are at or above the maximum rate of a Pay Range.

- **Select specific rules...**
 - **Apply to maximum:** If you select this option the general pay increase will only be applied to the maximum rate of a Pay Range.
 - **Apply to minimum:** If you select this option the general pay increase will only be applied to the minimum rate of a Pay Range.
 - **Process pay range first:** If you select this option the pay range will be applied prior to processing the next scheduled general pay increase.

General Pay Increase Entry

Enter the General Pay Increase amounts in the matrix created based on the information you provide in the General Pay Increase description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

If you want to cost a reduction in pay, you can enter a negative General Pay Increase. Use the “-” sign before the dollar amount or percentage by which you want to reduce pay.

Interaction Between General Pay Increase Proposals and Pay Progressions: Example

Bargaining Power determines how the general pay increase interacts with a pay progression based on the selection made in the Interaction with pay progression drop-down box. In the example below, the provision effective date is January 1, 2015.

- 1. Enter a Pay Progression provision in the Pay Progression Entry dialog box as follows:

Entry -

Save

Add Rows

Cancel

Eligibility (Months)	
0	8.00
12	8.50
24	9.00

2. Enter a General Pay Increase proposal effective July 1, 2016, as a \$ amount per hour: \$0.30 in the General Pay Increase description dialog box as follows:

The screenshot shows a software window titled "General Pay Increase Proposal". It features a menu bar with options: Open, Save, Add, New, Delete, Provisions, Notes, and Entry. The form contains the following fields and controls:

- Name:** A text box containing "\$0.30 pay increase effective July 1, 2016".
- For:** A dropdown menu showing "Entire bargaining unit" with a three-dot icon to its right.
- Effective:** A date picker showing "1/1/2015".
- End:** A date picker showing "12/31/2017".
- Changes:** A checked checkbox followed by a dropdown menu set to "By date".
- Varies by:** An unchecked checkbox followed by an empty dropdown menu.
- Enter:** A dropdown menu set to "\$ amount", followed by the word "per", and another dropdown menu set to "Hour".
- Percentage of:** An empty dropdown menu.
- Interaction with pay progression:** A dropdown menu set to "Both are paid".
- Interaction with pay range:** A dropdown menu set to "Do not apply".
- Below the "Interaction with pay range" dropdown are three unchecked checkboxes:
 - Apply to maximum
 - Apply to minimum
 - Process pay range first

The table that follows shows what the base pay rate for an employee hired on February 1, 2001 would be as the Pay Progression anniversaries are reached, and as the General Pay Increase is effective, depending on the choice made in *Interaction with pay progression*.

	Both are paid	Advance on progression Increase
February 1, 2015 (hire date)	\$8.00	\$8.00
July 1, 2015 (general pay increase)	\$8.30	\$8.30
February 1, 2016 (12 month anniversary)	\$8.80	\$8.50
February 1, 2017 (24 month anniversary)	\$9.30	\$9.00

8.7 Differentials

Overview

Differentials are components of pay for which employees are eligible in addition to their base pay. Bargaining Power divides differentials into two types, Incidence-based and Hours-based.

Incidence-Based Differentials are paid as a result of events or occurrences, such as bad weather, hazardous duty or intermittently assigned duties. They are not tied to hours entered in the Time Paid matrix. You enter the frequency of incidence of these Differentials as well as how they are paid in the Differential entry in the Current Contract and Proposals tabs.

Hours-Based Differentials are paid for permanent assignments or particular characteristics of certain employees -- such as education, longevity payments, or a shift that is worked. Hours-based differentials appear as rows in the Time Paid matrix. You enter the hours for which these differentials are paid there. The hours that you enter may be included in Regular hours, or may be unique. When you enter differential hours in the Time Paid Entry dialog box, you are asked to specify whether they are included in, or are a subset of, the regular hours you have entered, or whether they are separate, or additional. For more information, see the *Hours Based Differential Example*. You enter the payment for hours-based differentials in the Differential entry in the Current Contract and Proposals tabs.

The table below shows the division between the two types of differentials Bargaining Power provides for your use.

Incidence-Based Differentials	Hours-Based Differentials
Foreman	Education
Hazard	Experience
Task	Shift
Weather	Skill
Work Outside Title	

If a differential that Bargaining Power defines as hours-based is incidence-based in your labor agreement, you can change it in the Classifications screen. Highlight the differential name in the combo-box list, press F2 and press Enter. The system will ask if you want to modify the differential type to be incidence-based.

You can name your own differentials in Classifications in the Employee Database tab, or Proposal entry. In Classifications, you can enter the name of the Differential in the Differential combo box. As you enter the name of a Differential, you are asked whether it is incidence-based. In Proposals, you select Other in the Differentials menu, enter the differential name and check the box if it is incidence-based.

The Differentials available for selection in the Current Contract tab are those that you identify in the Classifications dialog box. All Differentials identified in Classifications must be defined before Bargaining Power calculates base costs. In the Proposals tab, you can choose from any differential available in the Bargaining Power menu and any that you entered in Classifications, or you can name a new one using the Other category.

Differentials: Other

To name and enter a proposed differential that does not appear in the Bargaining Power Differential menu, select Other from the Differential menu. This will invoke a screen on which you enter the name of the Differential and then check a box if the Differential is incidence-based. When you choose Add from the Toolbar and exit the Window, the name you enter becomes available for selection in the Differential menu in the Proposals tab.

To change the name of an existing Differential, perform the following steps:

1. Choose Other from the Differentials submenu.
2. Click Open on the toolbar. A drop-down list box opens, displaying the list of existing Differentials.
3. Highlight and double-click the name you want to change from the drop-down list. The Differential you have selected appears in the field entry box.
4. Type the new name and click Save on the toolbar.

Note: You cannot change your choice in the Incidence-based check box.

8.7.1 Hours-Based Differentials

Includes Education, Experience, Skill, and Shift.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Note: The system will display an error message if you attempt to save a differential provision for a group that includes a classification that you did not identify as eligible for the differential type in Classifications. If this occurs, redefine the group so that it does not include the ineligible classification(s).

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit dialog box. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the differential payment changes during the base period, check **Changes** and select the timing of the change(s) from the combo box.

Varies by: Check this box if the amount of the Differential varies by a characteristic in your employee database, then select the characteristic from the combo box.

Enter: Select from the combo box whether the differential represents a \$ amount or a % of pay.

If you select \$ amount, choose from the **per** combo box the time period for the \$ amount.

If you select % of pay, choose the components of pay to be included as the base for the percentage.

Apply to: If you choose Hour in **Amount per**, the Time Paid matrix is displayed. Check the hours to which the differential payments are applied.

Pyramiding option: If you select \$ amount per hour and you select OT, DT, or XT hours, choose a ***Pyramiding option*** to indicate how the Differential is paid on overtime, double time or other premium (XT) hours.

Differential Proposals

The Proposal Toolbar for Hours-based Differentials includes an Hours selection. Choose this if:

- The proposal you make will change the number of hours for which the Differential is paid from those you entered in the Time Paid matrix in the Hours tab;
- You are entering a proposal for a new Differential; or
- You are offering a Differential for which a provision is entered to a group of employees that did not previously receive it.

Select Hours to display the Time Paid matrix Differential row. Enter the annual Differential hours for a single employee.

Hours-Based Differentials Entry

Enter the Differential pay amounts in the matrix created based on the information you provide in the Description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

Hours-Based Differentials Example

You can enter the hours for a differential in the Time Paid Entry matrix in the Hours tab in one of two ways. You can indicate that the shift differential hours are included in, or are a subset of, the hours you entered in the Regular row. This is demonstrated in Example 1. You can also indicate that the shift differential hours are separate from, or in addition to, the regular hours, as demonstrated in Example 2.

The following examples demonstrate how the different choices you make regarding entry of an hours-based differential are handled by Bargaining Power.

In the following examples,

- You have a bargaining unit of 15 employees.
- You pay your employees to work 40 hours per week straight-time and 4 hours per week overtime.
- Each employee's base pay rate is \$10.00 per hour.
- 5 of the 15 employees work 20 hours per week on shift and receive a shift differential of 10% of base pay.

Example 1: Differential Hours Included in Regular Hours

To enter shift differential hours that are included in the hours entered in the Regular row perform the following steps:

1. Enter all the hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below. To indicate that the Shift hours are included in the Regular row, check the ***Hrs Included*** check box.

Time Paid

Open Save Add New Delete Notes Entry

Name: Time Paid-40 hours per week

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

Enter for: Single employee

Hours entered per: Week

Straight-time Multiples

OT 1.5 DT 2.0 XT

Entry -

Save Cancel

	Hrs Incl	ST	OT	Total
Regular	40			40
Shift	20			20

2.

Enter the base pay rate of \$10.00 per hour in the Pay Rate Provision description dialog in the Current Contract tab. Do not check the Shift differential hours in the *Apply to matrix*. The \$10 pay rate will then be applied only to the 40 hours entered in the Regular row.

Pay Rate Provision

Open Save Add New Delete Notes Entry

Name: \$10 Pay Rate

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

Changes

Varies by

Amount per: Hour

Apply to:

	ST	OT
Regular		
Shift	✓	✓

Entry - \$10 Pay Rate

Save Cancel

Enter value: 10

3. In the Shift Differential description dialog box in the Current Contract tab, enter the Shift Differential as 10% of base pay.

Differential Provision - Shift Differential

Open Save Add New Delete Notes Entry

Name: Shift Differential

For: Meter Reader B

Effective: 4/1/2017 End: 3/31/2018

Changes

Varies by

Enter: % of pay Hour

Percentage of: Base Pay

Pyramiding option: None

Apply to:

	ST	OT
Shift Differential	✓	✓

Entry - Shift Differential

Save Cancel

Enter value: 10

In this example, the costing and reports Bargaining Power produce will clearly separate the money that you spend on regular hours and that which you spend on shift differential for the same set of hours.

The information that will appear in your Base Cost report would be as follows:

Pay Rate	\$312,857
Shift Differential	\$5,214
Total	\$318,071

Example 2: Differential Hours Are NOT Included in the Regular Row

To enter shift differential hours that are NOT included in the hours entered in the Regular row perform the following steps:

1. Enter all the hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below. To indicate that the shift hours are in addition to the hours entered in the Regular row, do NOT check the *Hrs Included* check box.

The screenshot shows two overlapping windows. The 'Time Paid' window has fields for Name, For, Effective, End, Enter for, Changes, Hours entered per, Straight-time Multiples, OT, DT, and XT. The 'Entry' window shows a table with columns 'Hrs Incl', 'ST', 'OT', and 'Total'. The 'Regular' row has 'Hrs Incl' checked and 'Total' 40. The 'Shift' row has 'Hrs Incl' unchecked and 'Total' 20.

2. Enter the base pay rate of \$10.00 per hour in the Pay Rate Provision description dialog in the Current Contract tab. Do not check the Shift differential hours in the *Apply to* matrix.

Pay Rate Provision

Open Save Add New Delete Notes Entry

Name: \$10 Pay Rate

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

☐ Changes

☐ Varies by

Amount per: Hour

Apply to:

	ST	OT
Regular	✓	✓
Shift	✓	✓

Entry -

Save Cancel

Enter value: 10

3. In the Shift Differential description dialog box in the Current Contract tab, enter the Shift Differential as 110% of base pay.

Differential Provision - Shift Differential

Open Save Add New Delete Notes Entry

Name: Shift Differential (110%)

For: Meter Reader B

Effective: 4/1/2017 End: 3/31/2018

☐ Changes

☐ Varies by

Enter: % of pay Hour

Percentage of: Base Pay

Pyramiding option: None

Apply to:

	ST	OT
Shift Differential	✓	✓

Entry - Shift Differential (110%)

Save Cancel

Enter value: 110

This manner of entering differentials allows you to view the shift differential hours in isolation. Unlike the method above, in this example, Bargaining Power’s costing and reports will show that the cost for these 20 hours per week is \$10.10 per hour.

The information that will appear in your Base Cost report would be as follows:

Pay Rate	\$312,857
Shift Differential	\$57,357
Total	\$370,214

Note that since you have not checked the differential hours in the Apply To matrix in the Base Pay entry, these hours will NOT be included in Time off calculations when your *Payment includes* selection is Base pay on straight-time hours only, but will be included when you select or All pay and benefits on straight-time hours only.

Incidence-Based Differentials Entry

The Incidence-based Differential Entry dialog box contains a combo box at the top from which you select Differential rates and the *Number of incidents per* the specified time period. You must populate a matrix for both Differential rates and number of incidents. If you select a *Vary by* characteristic, there are multiple rows in each of the matrices; if you select *Changes*, there are multiple columns for each change factor.

8.8 Cost of Living Adjustments (COLA)

Cost of Living Adjustments, or COLA's, are payments based on the behavior of an external index, such as the π Consumer Price Index, or any other measure of economic conditions. To describe a COLA, you enter both the manner of payment and your projection of the behavior of the index.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the COLA amount, or the projected values of the external index, changes during the base period, check **Changes**, and select the timing of the changes from the combo box.

Enter: Specify whether the COLA payment is a dollar amount or a percentage of pay.

If you select \$ amount, choose from the **per** combo box the time period for the \$ amount you enter and select the pyramiding option for use in overtime.

If you select % of pay, choose the components of pay to be included as the base for the percentage increase.

Pay: Select from the combo box whether the COLA is paid.

On Index change above a minimum: Pay the COLA amount or percentage only if the index rises above an amount you specify, and only for the amount by which the index exceeds that minimum; or

For the entire index change: Apply the COLA without regard to a minimum change requirement.

With a: Select from the combo box whether the COLA payment has a:

- Minimum
- Maximum
- Both
- Neither

per: Choose whether the minimum and/or maximum payment is per year or per month.

Apply to: If you choose \$ amount per Hour, the Time Paid matrix is displayed. Check the hours to which the COLA payment is applied.

Pyramiding option: If you select \$ amount per Hour, and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the differential is paid on overtime, double time or other premium (XT) hours.

More: If the description dialog box does not enable you to fully describe your COLA payment formula, select the More button to refine the description as follows:

COLA (cont'd.) - Current COLA Provisions

Save Cancel

☒ Compare COLA payment with % of pay: Base Pay

Pay Lower Percent of pay: 1.5

☒ Round Payment to the nearest .05

Compare COLA with % of pay: Check this box if the COLA payment is measured against a percentage pay increase. Use the combo box to select the components of pay to which the percentage is applied, then enter the amount of % of pay to which the calculated COLA payment should be compared.

Pay: Once the comparison is defined, use this combo box to indicate whether the COLA provision or proposal pays the higher or lower of the COLA or the % of pay.

Round: Check this box if your COLA formula includes a rounding element. If you check this option, then choose whether the rounding factor applies to the index or the COLA payment. Next, enter a number in the *to the nearest* field. If you apply rounding to the index, the number is always a percentage. If you apply rounding to the payment, it can be either a dollar amount or percentage, depending on what you entered in the COLA description dialog box. The dollar amount is paid for the same increment of time you choose in the description dialog box.

Roll into base: Check the box if the COLA is to be rolled into the base. If it is rolled into the base, although its cost will be displayed on its own line item, it will be included when any other pay or benefit is defined as a Percentage of base pay.

Interaction with pay range: If you enter a pay range you may choose to:

- Apply COLA to pay range maximum
- Apply COLA to pay range minimum
- Process pay range first

If you select none of these, the COLA will increase the employees' pay but will not affect the maximum or minimums set for the pay range rules. The COLA will not be applied in its entirety if that would raise the employee above the maximum.

If a COLA occurs during the same month as a change in the Pay Range, Bargaining Power will, by default, apply the COLA to employees' pay and then calculate the Pay Range. To override this default, and apply the COLA after the pay range adjustments are calculated, select Process pay range first.

If a COLA increase and a general pay increase proposal occur on the same day Bargaining Power will process the COLA first.

Cost of Living Adjustments Entry

The columns in the Entry matrix are determined by the **Changes** selection you make in the COLA description dialog box. The rows are determined by your selection in the description dialog box. They can include:

Index: Enter the percentage change in the index.

COLA Provision

Open Save Add New Delete Notes Entry

Name:COLA: Introduce Maximum

For:Entire bargaining unit

Effective:4/1/2017End:3/31/2021

☒ ChangesAnnually

Enter:% of payper

Percentage of:Base Pay

Pyramiding option:

Pay:On index change above minimum

with aBothper Month

☐ Roll into base

Interaction with pay range:☐ Apply COLA to pay range maximum

Entry -

Save Cancel

	L Yr	Yr 1	Yr 2	Yr 3
Index change	2.5	2.5	3.0	3.5
Rate	1.5	1.5	1.5	1.5
Per	3	3	3	3
Minimum index change	1	1	1	1
Minimum payment	250	250	250	250
Maximum payment	1200	1200	1200	1200

Rate: Enter the COLA percentage or \$ amount.

Per: If you have a COLA formula that provides a payment (Rate) per some multiple of change, for example 5 cents for every 3% increase in the CPI, you would enter the multiple (in this example 3) in the Per row.

Minimum: Enter the minimum index change, above which the COLA is paid, if applicable.

Minimum Payment: Enter the minimum \$ amount or percentage pay, if applicable. If you enter a \$ amount, the payment should be for the same time period as you selected in the COLA description dialog box.

Maximum Payment: Enter the maximum \$ amount or percentage pay, if applicable. If you enter a \$ amount, the payment should be for the same time period as you selected in the COLA description dialog box.

8.9 Incentives

Incentives in Bargaining Power are payments employees receive based on factors other than time, such as productivity, sales, revenues, pieces worked, or any other index you name. To describe an incentive, you enter both the manner of paying it, and your projection of the behavior of the index on which it is based.

You must define at least one incentive for Classifications described as Incentive-only.

The Incentives available for selection in the Current Contract tab of Bargaining Power are those identified in the Classifications dialog box... All identified incentives must be defined before Bargaining Power can calculate base costs. If no incentives are identified in Classifications, Incentive will not appear in the Current contract Pay menu. A complete menu of incentives is available in the Proposal tab:

- Commissions
- Gain sharing

- Piece rates
- Production standards
- Productivity payments
- Profit sharing
- Other

Incentive: Other

To name and enter a proposed incentive that does not appear in the Bargaining Power Incentive menu, select Other from the Incentive menu. This will invoke a screen on which you enter the name. When you choose Add from the Toolbar and exit the screen, the name you entered becomes available for selection in the Proposals tab. To change the name, select Other from the Incentives menu and use Open to choose the name you want to change from the drop-down list. Change the name, and use Save.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the Incentive amount, or the projected value of the index on which it is based changes during the base or settlement period, check **Changes**, and select the timing of the changes from the combo box.

Enter: Specify whether the Incentive payment is a dollar amount or a percentage of pay.

If you select % of pay, choose the components of pay to be included as the base for the % increase.

per/of: Enter a number for the benchmark unit of the index or factor, and the name of index or factor, such as "**per** \$1000 **of** sales" or "**per** 1 **of** productivity payment %."

Note: If an Incentive payment is a percentage of the index, you can describe it as a \$ amount. For example, if a commission payment is 1% of sales, select **Enter** \$ amount **per** 1 **of** sales. In the Entry matrix, define the Incentive amount as \$0.01. If you enter the sales amount as dollars, you have, in effect, entered the commission as 1% of sales.

You cannot select % of pay for Incentive Only employees if you are entering only one Incentive for them. If such an employee group is paid by more than one Incentive, define one incentive payment as a percentage of pay with that pay defined as another (or several other) incentive payment(s).

With a: Select from the combo box whether the Incentive payment has a:

- Minimum
- Maximum
- Both
- Neither

per: Choose whether the minimum and/or maximum payment you enter is per year or per month.

The choices above refer to the Incentive payment itself -- not to the behavior of the index or factor.

More: If the Incentives description dialog box does not enable you to fully describe your Incentive payment formula, select the More button to further refine your description to include **Number of thresholds**.

Number of thresholds: Thresholds enable you to change the Incentive payment based on the behavior of the factor or index to which it is related.

For example, a piece-rate provision that pays \$5.00 per hour for the first 25 pieces; \$5.25 per hour for the next 50 pieces; and \$5.50 per hour above 75 pieces, has 3 thresholds, each requiring a different Incentive payment amount. (For a more comprehensive example see the *Incentives: Example*.)

Round: Check this box only if you use a rounding element. If you check this option, use the combo box to indicate whether the rounding factor applies to the index or to the Incentive payment.

Once you have selected the rounding factor, enter the number you would like Bargaining Power to round to in the to the nearest entry field. If you apply rounding to the Index, the number is always a percentage. If you apply rounding to the payment, it can be either a dollar amount or percentage, depending on what you entered in the Incentive description dialog box. The dollar amount is paid for the increment of time you choose in the description dialog box.

Incentives Entry

The columns in the Entry matrix are determined by the selections you make in ***Changes*** in the Incentives description dialog box. The rows are determined by your selections in the description dialog box. They can include:

Index/factor name: Enter the projected values of the index named in the Incentives description dialog box.

Minimum Payment: Enter the minimum \$ amount or % of pay. If you enter a \$ amount, the payment you enter here should be for the same time period as you selected in the Incentives description dialog box.

Maximum Payment: Enter the maximum \$ amount or percentage pay if applicable. If you enter a \$ amount, the payment you enter here should be for the same time period as you selected in the description dialog box.

Threshold: There will be a threshold row for the number of thresholds you specify in *More*. In the threshold row, enter the upper limit of the threshold. For the final threshold, do not enter a value. If there is an upper limit to the Incentive payment, enter it as a Maximum Payment.

Rate: Enter the Incentive percentage or amount. If there are thresholds, enter the rate paid for the index value up to the threshold.

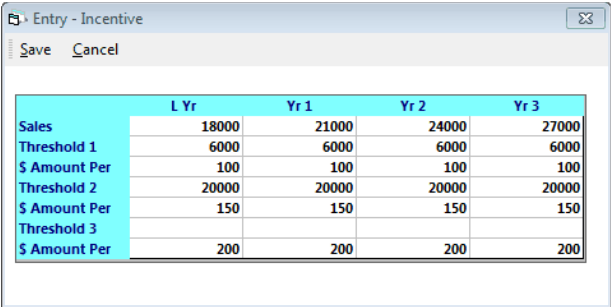
Incentives Example

You define a Commission structure using the following formula:

- \$100 per \$1,000 for sales up to \$6,000
- \$150 per \$1,000 for sales between \$6,000 and \$20,000
- \$200 per \$1,000 for sales above \$20,000

The index and projected sales change every year for a three year contract.

The example below shows how the Entry matrix would be entered:



The screenshot shows a dialog box titled "Entry - Incentive" with "Save" and "Cancel" buttons. Inside is a table with the following data:

	L Yr	Yr 1	Yr 2	Yr 3
Sales	18000	21000	24000	27000
Threshold 1	6000	6000	6000	6000
\$ Amount Per	100	100	100	100
Threshold 2	20000	20000	20000	20000
\$ Amount Per	150	150	150	150
Threshold 3				
\$ Amount Per	200	200	200	200

If minimum or maximum values are defined, they remain constant for each threshold.

8.10 Bonus

In Bargaining Power, a Bonus is a component of pay that is not rolled into the base, such as a ratification bonus or a lump sum increase.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire Bargaining Unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If there is more than one Bonus payment during the base or settlement period, check **Changes** and select the timing of the increases from the combo box. If the Bonus expires, or is a one-time payment, choose changes, and enter a zero value for the date on which it expires.

Varies by: Check this box if the Bonus payment varies by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the Bonus amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group. If you select Flat amount per group, Bargaining Power will not alter the values you entered in the Entry matrix if the total number of employees change.

Enter: Select from the combo box whether the Bonus is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components you would like included as the base for the percentage from the ***Percentage of*** drop-down list box.

Lump Sum: If a payment is designated as a “lump sum”, its cost will be unaffected by any Time Off provision or proposal costing even if you specify that payment for time off includes “All pay and benefits on all hours” or “All pay and benefits on straight-time hours only”.

Apply to: If you choose Hour in ***Amount per***, the time paid matrix is displayed. Check the hours to which the Bonus is applied.

Bonus Entry

Enter the Bonus amounts in the matrix created based on the information you provide in the Bonus description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprise the matrix columns

8.11 Severance

Severance provisions and proposals, when included in a base or settlement, are automatically applied to employees who are laid off in the workforce simulation. If you indicate a decline in the workforce, Bargaining Power subtracts from the decline in the total number of employees the number of employees who would leave due to regular turnover, and applies the selected Severance provision or proposal to the remainder. You can enter a decline in the total number of employees in:

- Workforce Dynamics: Total number of employees;
- Workforce: Total Number of Employees proposal; or

The line item for a Severance provision or proposal in a Provision, Proposal, base or settlement costing reflects the Severance payments for the employees laid off due to a scenario you enter in Workforce Dynamics: Total number of employees.

However, the cost of severance payments made to employees laid off due to a Workforce, Total Number of Employees Proposal is automatically included in the cost of that Proposal, according to the Severance terms in a provision in a base, or in a Severance Proposal included in the same settlement.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Bargaining Power gives the Severance pay to the employees that Bargaining Power has laid off from the selected group.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If Severance payments change during the base or settlement period, check **Changes** and select the timing of the increases from the combo box.

Enter: Select from the combo box whether the Severance payment is entered as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the components of pay that you would like included in the base for the percentage from the **Percentage of** drop-down list box.

Severance Provision

Open Save Add New Delete Notes Entry

Name: Current Severance Plan

For: Entire bargaining unit

Effective: 8/1/2014 End: 7/31/2018

☐ Changes

Enter: \$ amount per Week

Percentage of:

☒ Length of payment tied to length of service

Pay for 1 weeks for each 1 years of service

with Neither a minimum nor a maximum

Length of payment tied to length of service: Check this box if the amount of a Severance payment is a function of a laid –off employee’s length of service.

Pay for: Specify the duration of the Severance payment by entering a number, and the unit of time in weeks, months or years, e.g., 4 weeks, 2 months, etc.

For each: If you selected Length of payment tied to length of service, specify the length of service increment for the Severance payment. In ***Pay for***, enter a number and time increment (month or year). For example, ***Pay for*** 1 week ***for each*** 1 year of service.

Apply to: If you choose Hour in ***Amount per***, the Time Paid matrix is displayed. Check the hours for which Severance is paid.

With payment per employee: Select from the combo box whether the Severance payment has a:

- Minimum
- Maximum
- Both
- Neither

Severance Entry

Enter the Severance amounts in the matrix created based on the information you provide in the Severance description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

Minimum Payment: Enter the minimum \$ amount or % of pay per employee, if applicable.

Maximum Payment: Enter the maximum \$ amount or percentage pay per employee, if applicable.

8.12 Other Pay Types

The Other pay type allows you to define a pay provision or proposal that does not fit into any of the pay types Bargaining Power provides. When you name and enter a pay type, it becomes available for selection in the Bargaining Power Pay menu. For information on how to create a user-defined pay provision or proposal, see Section 8.12.1, *Creating User-Defined Provisions and Proposals*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes** and select the timing of the increases from the combo box.

Varies by: Check this box if the amount of the provision or proposal payment varies by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the provision or proposal is entered as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included in the base for the percentage from the ***Percentage of*** drop-down list box.

Lump Sum: If a payment is designated as a “lump sum”, its cost will be unaffected by any Time Off provision or proposal costing even if you specify that payment for time off includes “All pay and benefits on all hours” or “All pay and benefits on straight-time hours only”.

Apply to: If you choose Hour in ***Amount per***, the Time Paid matrix is displayed. Check the hours included in the provision or proposal.

Other Pay Types Entry

Enter the amounts in the matrix created based on the information you provide in the Other Pay Types description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alpha-numeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

8.12.1 Creating User-Defined Provisions or Proposals

Bargaining Power enables you to create your own types of pay, benefit, time off and legislated provisions or proposals. When you name and enter a new type, called user-defined types, it becomes available for selection in the designated menu.

Note that in a Base you cannot enter more than one provision of the same type for the same group of employees. In a settlement you cannot enter more than one proposal of the same type for the same group of employees. This means if you name an “other” in the Pay section, for example, “Ratification Bonus” you cannot cost more than provision within the Ratification Bonus category in the same base. If you have two Ratification Bonuses in a base, you can name one Pay “other” Ratification Bonus I, and the second pay “other” Ratification Bonus II.

To create a user-defined provision or proposal, perform the following steps:

1. Choose Other from the appropriate submenu. The New Type dialog box opens.
2. Click New.
3. Enter the name of the new provision or proposal in the New Type entry field.
4. Click Add.

To change the name of an existing user-defined provision or proposal, perform the following steps:

1. Choose Other from the appropriate submenu. The New Type dialog box opens.
2. Click Open. All of the existing user-defined provisions or proposals are listed.
3. Enter the new name.
4. Click Save.

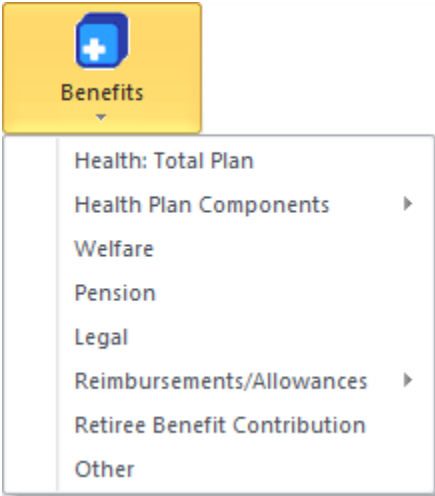
To delete a user-defined provision or proposal, perform the following steps:

1. Choose Other from the appropriate submenu. The New Type dialog box opens.
2. Click Open. All of the existing user-defined provisions or proposals are listed.
3. Double-click on the name of user-defined provision or proposal you wish to delete.
4. Click Delete.

9 Benefits

Overview

Benefits are the “non-pay” components of employees’ compensation, including both the contributions that you make for health, welfare, pension and other funds, as well as reimbursements and allowances for tuition, uniforms, tools, and the like. In Bargaining Power, you enter the organizational costs of providing the benefits, not the value of the benefits to the employees.



9.1 Health: Total Plan

Standard Bargaining Power functions and options allow you to enter Health Plan contributions that vary both by plan itself (for example, “traditional” health plans, preferred provider options, health maintenance organizations) as well as by plan contribution levels (such as for single or family or head of household coverage). If you have a single characteristic in your employee database that contains values that include both the plan itself and the contribution level, you can enter a single provision or proposal for all your health plan contributions, by choosing that characteristic as the ***Vary by*** characteristic. You may have more than one characteristic to identify contribution levels for employees -- one for the plan, and another for the contribution level within the plan. If so, you can enter multiple provisions or proposals for each plan, and combine them during costing to see a single line-item cost, provided they do not cover the same group of employees during the same period of time.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Benefits Provision - Health: Total Plan

Open Save Add New Delete Notes Contribution Entry

Name: HMO Monthly Contribution Projection

For: Entire bargaining unit

Effective: 8/1/2015 End: 7/31/2019

☒ Changes: Annually

☒ Varies by: Family Status

Enter for: Single employee

Enter: \$ amount per Month

☐ Exclude from time off payments

Percentage of:

☐ Enter employee contribution as:

Pyramiding option:

Entry - HMO Monthly Contribution Projection

Save Cancel

Eligibility	L Yr	Yr 1	Yr 2	Yr 3
Single				
Family				

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line. **Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year, or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Health: Total Plan Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Health: Total Plan description dialog box. If you select a *Varies by* characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select *Changes*, the timing of the changes comprises the matrix columns.

9.2 Health Plan Components

Includes Accidental Death, Dental Care, Doctors Visits, Hospitalization, Life, Long Term Disability, Major Medical, Maternity, Optical Care, Prescription Drugs, Sickness and Accidents, Health Coverage, and Other.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line.**Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year, or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Health Plan Components Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Health Plan Components description dialog box. If you select a *Varies by* characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select *Changes*, the timing of the changes comprises the matrix columns.

9.2.1 Health: Total Plan vs. Health Plan Components

There are *two* ways to enter your health plan.

- If you would like to enter one contribution rate for all of the health benefits you provide, enter your health coverage contributions in total in Health Total Plan.
- If your health plan has individual components that you would like to cost separately, enter all of the components you provide in Health Plan Components. This enables you to cost provisions and make proposals on the individual components of your health plan. In this case, the contributions will be additive, and the components will be cost separately.

9.3 Welfare

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line. **Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee's contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year, or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Welfare Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Welfare description dialog box. If you select a *Varies by* characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select *Changes*, the timing of the changes comprises the matrix columns.

9.4 Pension

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line.**Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium either as a \$ amount per hour, day, week, month, or year, or as a %. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Pension Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Pension description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

9.5 Legal

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line. **Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Legal Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Legal description dialog box. If you select a *Varies by* characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select *Changes*, the timing of the changes comprises the matrix columns.

9.6 Reimbursements/ Allowances

Includes Tuition, Uniform, Supplies, Tools, and Other.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line.**Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Reimbursements/Allowances Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Reimbursements/Allowances description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

9.7 Retiree Benefit Contribution

Retiree Benefit Contribution provisions and proposals are intended only for user's whose contributions are a function of the number of living retirees they cover. It is not intended for use for such contributions that are set by month or year or of any characteristic of active employees. The latter kind of contributions can be entered elsewhere, in the Benefits section.

Both Retiree Benefit provisions and proposals are cost using the Retiree information you enter in Workforce Dynamics: Retirees, or Proposals: Workforce: Retirees.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Note: This identifies the group of employees from which the retirees are drawn. Contributions are not applied to the active employees who are members of the group selected.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Single retiree. No other choice is available.

Enter \$ amount per: Choose from the *per* combo box the time period for the \$ amount.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Retiree Benefit Contribution Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Retiree Benefit Contribution description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

9.8 Other Benefits

The Other Benefit type allows you to define a Benefit provision or proposal that does not fit into any of the Benefit types Bargaining Power provides. When you name and enter a Benefit type, it becomes available for selection in the Bargaining Power Benefit menu. For information on how to create a user-defined benefit provision or proposal, see Section 8.12.1, *Creating User-Defined Provisions and Proposals*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a benefit contribution changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Varies by: Check this box if benefit contributions vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire group of employees, or a Flat amount per group for the selected group of employees that does not change with employee count changes.

Enter: Select from the combo box whether the benefit contribution is expressed as a \$ amount or a % of pay.

If you select \$ amount, choose from the *per* combo box the time period for the \$ amount.

If you select % of pay, choose the pay components that you would like included as the base for the percentage from the *Percentage of* drop-down list box.

Exclude from Time Off payments: If you have selected “All pay and benefits on straight-time hours” or “All pay and benefits on all hours” for a time off payment and you are entering an hourly benefit, you can specify how the benefit will be distributed in your report by using the ‘Exclude from time off payments’ checkbox. If ‘Exclude from time off payments’ is checked the entire cost of the benefit will appear on the benefit line and will not be affected by any changes in Time Off. If you leave the box unchecked, the portion of the benefit that is paid on time off will appear on the Time Off line. **Enter employee contribution as:** You can choose to have the entry matrix reflect the total cost of the benefit plan, and then enter employee contributions as either percentages or dollar amounts. The employee contribution percentage or dollar amount will then reduce the amounts in the entry matrix to reflect only the portion paid by the employer. This is especially helpful if you negotiate employee contribution percentages or dollar amounts.

For example, if the monthly per-employee premium is \$800 and each employee contributes 20% of the cost, enter \$800 in the Entry screen and 20% in the Contributions entry screen. The cost in your report will be 80% of \$800, or \$640 per employee.

When you check this box the Contribution menu item becomes available. Click on Contribution to enter the employee’s contribution to the premium. This can be entered as either a \$ amount per hour, day, week, month or year or as a % contribution. Enter the full premium paid in the Entry screen.

Pyramiding option: If you select a \$ amount per hour or % of pay and you select OT, DT, or XT hours, choose a Pyramiding option to indicate how the benefit is paid on overtime, double time or other premium hours.

Apply to: If you choose Hour in *Amount per*, the time paid matrix is displayed. Check the hours to which the bonus is applied.

Other Benefits Entry

Enter the contribution amounts in the matrix created based on the information you provide in the Other Benefits description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

10 Time and Workforce

In the Current Contract and Proposal tabs, you can distinguish between time worked and time off by describing the Time Off At Work and Time Off Away From Work provisions and proposals. For more information on entering Time Off provisions and proposals, see Section 10.1, *Time Off*.

In the Proposals tab, you can enter proposals that alter the total number of hours paid. Hours, in the Proposals tab corresponds to Hours in the Hours tab. For more information on entering Time Paid proposals, see Section 10.4, *Time Paid Proposals*. For more information on entering Time Paid scenarios in the Hours tab, see *Chapter 4, Hours*.

You can enter proposals related to changes in the workforce by selecting Workforce in the Proposals tab. Workforce, in the Proposals tab corresponds to the Workforce Dynamics tab in the Setup section, and includes Total Number of Employees, Turnover, and Replacements. It also includes a Classifications category – which corresponds to Classifications in the Employee Database tab in the Setup section. In Classification proposals, you can enter scenarios that create, combine, or eliminate classifications. For more information on entering Workforce proposals, see *Section* For more information on entering W

Time Off At Work: Including Meals, Rest Periods, Clean-up, Union Business, Guarantees, and Other.

Time Off Away From Work: Including Sick, Vacation, Personal Days, Holidays, Bereavement, Jury Duty, and Other.

Proposals, Workforce: Corresponds to the Workforce Dynamics tab in the Setup section. In the Proposals tab it includes Total Number of Employees, Turnover, Replacements, Retirees, and Classifications -- Create, Combine, and Eliminate.

10.1 Time Off

When you enter information in the Time Paid dialog box in the Hours tab, the hours entered include all time paid – time worked, time off at work (such as meal periods, rest periods, guarantees, etc.) and time off away from work, including vacation, sick, and the like. In the Time Off category of the Current Contract tab you can specify the subset of these hours that are for unproductive time either at work or away from work.

There are four reasons to enter current contract provisions in the Time section:

- You want to see how much you spend in Time Off provisions.
- You want to see Benchmark Statistics and Time Details data regarding productive versus unproductive hours.
- You expect to make proposals to change time off provisions, and want Bargaining Power to calculate the marginal costs of such proposals over your current practices.
- By entering time off provisions you can obtain accurate costs for any hours-based provisions such as hours-based COLA, differential, incentive or benefits that are only paid for hours worked. Bargaining Power uses all the hours entered in the Time Paid category to calculate the costs of these hours-based provisions. By entering time off provisions that are paid by base pay only, and combining those provisions with the hours-based provisions, you will net out the Time Off hours that are not included in those hours-based payments.

When you request a costing for a Time Off provision you will see its costs broken out in your report.

Time Off At Work includes:

- Meal periods
- Rest periods
- Clean-up
- Union business: Contract provisions that granted paid time off to some or all employees to attend to union affairs.
- Guarantees: Provisions such as call-in pay, stand-by pay, penalties, etc., that entitle employees to pay when they do not actually perform work.
- Other: Provisions for other time off at work, such as for training, outside meetings, etc.

Time Off Away from Work includes:

- Sick
- Vacation
- Personal Days: also called floating holidays, personal leave, personal time, etc.
- Holidays
- Bereavement leave, also called funeral pay.
- Jury Duty
- Other

Bargaining Power uses the values you enter in ***Number of days per week*** in the Time Paid dialog box to cost time off provisions and proposals.

In the following example:

- You have a bargaining unit with 5 employees.
- You enter a Sick provision where each employee takes 8 sick days per year.

If you enter a Time Paid scenario where you pay your employees 5 days per week, 40 hours per week, each sick day will be counted as an 8-hour day (40 hours per week divided by 5 days per week equals 8 hours per day).

If you enter a Time Paid scenario where you pay your employees 40 hours per week but specify that they work 4 days per week, each sick day will be counted as a 10 hour-day. (40 hours per week divided by 4 days per week equals 10 hours per day).

10.2 Time Off At Work

Includes Meals, Rest Periods, Clean Up, Guarantees, Union Business, and Other.

Meal periods, rest periods, clean up, union business and guarantees are current contract and proposal components that entail paying for time that is not strictly productive, usually at the work place.

You enter provisions in order to enable Bargaining Power to separate productive time from unproductive time in Benchmark Statistics and Time Details, or in order to enable the calculation of the marginal costs of proposals you may make to change either the number of hours, or the manner of paying employees for this time.

By default, it is assumed the hours that comprise Time Off At Work are included in the hours you entered in the Time Paid Entry matrix in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). For more information, see the *Advanced Topic: Time Off At Work Entry vs. Pay Includes Options*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check this box and select the timing of the change(s) from the combo box.

Time entered for: Select whether the provision or proposal amount you enter is for a Single employee or the Entire group of employees selected. When entering provisions or proposals for Union Business you can also select Flat amount for group, in which case the number of hours you enter will not change, even if the number of employees in the selected group changes.

Hours entered per: Select from the combo box whether the hours you enter are per day, week, month, or year.

Time off at work: Select from the combo box whether Time Off At Work is paid or unpaid. The only reason to enter unpaid hours is if your current contract's Time Off At Work is unpaid and you expect to enter a proposal to pay for these hours, or vice versa. Unpaid hours should not be included in the Time Paid Entry matrix in the Hours tab.

Payment includes: Select from the combo box whether payment for time off at work includes:

- **Base pay on straight-time hours only** -- If you make this selection you will be paying your employees for time off but the payments will not include hours-based differentials, incentives, COLA, or hourly benefits. If you entered overtime, double time, or other premium hours in the Regular row of your Time Paid Entry matrix they will not be included either.
- **Base pay on all hours** -- If you make this selection you will be paying your employees for time off but the payments will not include hours-based differentials, incentives, COLA, or hourly benefits. However, if you entered overtime, double time, or other premium hours in the Regular row of your Time Paid Entry matrix they will be included.
- **All pay and benefits on straight-time hours only** -- If you make this selection you will be paying your employees for time off and the payments will include hours-based and incidence-based differentials, incentives, COLA, and hourly benefits. However, if you entered overtime, double time, or other premium hours in the Regular row of your Time Paid Entry matrix they will not be included.

- **All pay and benefits on all hours --** If you make this selection you will be paying your employees for time off and the payments will include hours-based and incidence-based differentials, incentives, COLA, and hourly benefits and if you entered overtime, double time, or other premium hours in the Regular row of your Time Paid Entry matrix they will be included as well.

Time Off At Work Entry

The entry matrix includes all the columns (straight time, overtime, double time, other premium time) that are applicable to the bargaining unit, regardless of whether they are applicable to the selected group of employees, or to the ***Payment includes*** selection you make in the description entry. Enter the hours that comprise the Time Off at Work provision or proposal type in the appropriate cell of the matrix. If you enter premium hours but specify that ***payment includes*** straight-time only; or if you enter hours in differential hours, but specify that ***payment includes*** base pay only, these hours will be ignored in the costing. For additional information, see the *Advanced Topic: Time Off At Work Entry vs. Payment Includes Options*.

If you selected the ***Changes*** check box in the description dialog box, the timing of the changes you selected will appear in the drop-down combo box on the upper left hand corner of the Time Off At Work Entry dialog box. Fill in the matrix for the first selection. When you are finished, click once on the down-arrow to the right of the drop-down box menu and select the next available option. Complete the entry matrix for all the change parameters. Click Save only when you have completed the matrices for all the change parameters.

If you selected Changes By date, fill in the combo box with the appropriate dates. The first date that appears in the drop-down combo box is the effective date. To add a new date, perform the following steps:

1. Click New.

The New Date dialog box opens.

2. Enter the new date in MM/DD/YY format.
3. Click OK.

You return to the Entry dialog box. The date you entered appears in the drop-down combo box in date order.

To change an existing date, perform the following steps:

1. Select the appropriate date from the drop-down combo box list.
2. Click Modify.

The Modify Date dialog box opens.

3. Enter the new date in MM/DD/YY format.
4. Click OK.

To delete a date, select the appropriate date from the drop-down combo box list and click Delete.

Proposals

Time Off at Work proposals can include two pieces of information that are not contained in current contract provision description entry screens:

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal some cost, or, if you enter a negative number, some savings, related to a loss or gain in productivity. Such a cost or savings might represent the impact of the increased or decreased productive time on revenues, or profits, or operational costs. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year. The cost that you enter is treated as a Flat amount per group regardless of the selection you made in “Time entered for.”

Time Off At Work: Advanced

Topic: Time Off At Work Entry vs. Payment Includes Options

If there is a conflict between where you entered the hours in the Time Off At Work Entry matrix and the selection you made in ***Payment Includes*** Bargaining Power will override your entry in the Entry matrix and cost the provision based on your selection in ***Payment Includes***.

To derive the cost for a Time Off At Work provision Bargaining Power uses the Payment Includes selection as illustrated in the following example.

Example:

- You have a current contract provision where you pay your employees for a one-hour meal period per week, but only when they work overtime.
- You enter the 1 hour in the Meals Provision Entry dialog box in the overtime cell, as shown below.
- To pay each employee overtime during the meal period you must select the ***Payment Includes*** selection Base pay on all hours or All pay and benefits on all hours, as shown below.

If you select the ***Payment Includes*** option, Base pay on straight-time hours only or All pay and benefits on straight-time hours only, the cost for the meal provision will be \$0.00, because you entered the hours in the overtime cell in the Meals provision Entry dialog box.

Time Off At Work Advanced

Topic: How Time Off At Work Interacts with Time Paid

How Time Off At Work Provisions Interact with Time Paid

By default, it is assumed the hours you enter in a time-off provision are included in the hours you entered in Time Paid in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). This means Bargaining Power will designate the time off hours entered in Time Paid as unproductive, but the total number of hours paid remains the same. For more information, see **Example: Time Off hours Are Included in Time Paid**.

In the following example,

- You have a bargaining unit of 10 employees.
- You pay your employees to work 40 hours per week straight-time and 4 hours per week overtime.
- You have a meal period provision where you pay your employees for a 1 hour meal period when they work overtime. This occurs once a week, per employee.

Example : Time Off Hours Are Included in Time Paid

1. You enter the total number of hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below.

The screenshot displays two overlapping windows from the 'Time Paid' software. The background window, titled 'Time Paid', contains fields for Name, For, Effective, End, Enter for, and a checkbox for Changes. The foreground window, titled 'Entry - Time Paid: 40 hours ST/ 4 hours OT', features a table for recording hours.

	Hrs Incl	ST	OT	Total
Regular		40	4	44

2. You enter the 1 hour per week meal provision in the Meals Provision Entry dialog box in the overtime cell, as shown below. The meal hours are included in the 4 hours per week overtime entered in Time Paid.

The screenshot shows two overlapping windows from a software application. The top window is titled "Meals Provision" and contains the following fields:

- Name: Meal Provision: 1 Hour Per Week OT
- For: Entire bargaining unit
- Effective: 8/1/2014 to 7/31/2018
- Changes: ☐
- Time entered for: Single employee
- Hours entered per: Week
- Time off at work: Paid
- Payment includes: Base pay on all hours

The bottom window is titled "Entry - Meal Provision: 1 Hour Per Week OT" and contains a table with the following data:

	ST	OT	Total
Regular	0	1	1

In this scenario, Bargaining Power considers 1 hour per week of overtime as unproductive and 3 hours per week of overtime as productive, but the total number of hours paid remains the same.

The information that will appear in the Time Details section of your Base Cost report would be as follows:

Hours Paid	22,943 hours	10 employees x 44 hours per week x Weeks per year
Total Paid Time Off	521 hours	10 employees x 1 hour per week x Weeks per year

How Time Off At Work Proposals Interact with Time Paid

By default, it is assumed the hours you enter in a time off proposal are included in the hours you entered in Time Paid in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). This means Bargaining Power will designate the time off hours entered in Time Paid as unproductive, but the total number of hours paid remains the same. For more information, see **Example : Proposal to Decrease Time** Example 2: Proposal to Include Overtime

The three examples that follow are cost against a base cost report that consists of the following data:

Current Contract Base Data

- You have a bargaining unit of 10 employees. Each employee receives \$10.00 per hour base pay.
 - You pay your employees to work 40 hours per week straight-time and 4 hours per week overtime.
 - You have a current contract provision where you pay your employees for a one hour meal period per day during regular, straight-time hours. Employees are paid their base pay on straight-time hours for the meal period.
1. You enter the total number of hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below.

Time Paid

Open Save Add New Delete Notes Entry

Name: Time Paid: 40 hours ST/ 4 hours OT

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

Enter for: Single employee

☐ Changes

Hours entered per: Week

Straight-time Multiplier: 1.5

OT: 2 DT: 2

Entry - Time Paid: 40 hours ST/ 4 hours OT

Save Cancel

	Hrs Incl	ST	OT	Total
Regular	<input checked="" type="checkbox"/>	40	4	44

2. You enter the 1 hour meal period provision in the Meals Provision Entry dialog box in the straight-time cell, as shown below. You select the **Payment Includes** option Base pay on straight-time hours only.

Meals Provision

Open Save Add New Delete Notes Entry

Name: Meal Provision: 1 Hour Per Day- ST

For: Entire bargaining unit

Effective: 8/1/2014 End: 7/31/2018

☐ Changes

Time entered for: Single employee

Hours entered per: Day

Time off at work: Paid

Payment includes: Base pay on straight-time hours only

Entry - Meal Provision: 1 Hour Per Day- ST

Save Cancel

	ST	OT	Total
Regular	1	0	1

In this scenario, Bargaining Power considers one hour per day of regular, straight time as unproductive and seven hours per day of regular, straight time as productive. The total number of hours paid remains the same.

The information that will appear in your Base Cost report would be as follows:

Meal Provision	\$26,071	10 employees x 1 hour meal per day x \$10.00 per hour x Days per year
Meal Provision	2,607 hours	10 employees x 1 hour meal per day x Days per year
Hours Paid	22,943 hours	10 employees x 44 hours per week x Weeks per year

Example 1: Proposal to Decrease Time Off

If you enter a proposal to decrease the number of meal hours paid from 1 hour per day to .5 the total number of paid time off hours will decrease, but the total number of hours paid will remain the same.

The screenshot shows the 'Meals Proposal' application window. The title bar reads 'Meals Proposal'. The menu bar includes 'Open', 'Save', 'Add', 'New', 'Delete', 'Provisions', 'Notes', and 'Entry'. The form contains the following fields:

- Name: Meal Proposal: 0.5 hours per day- ST
- For: Entire bargaining unit
- Effective: 4/1/2018 to 3/31/2021
- ☐ Changes
- Time entered for: Single employee
- Hours entered per: Day
- Time off at work: Paid
- Payment includes: Base pay on straight-time hours only
- ☐ Do not cost change
- Other cost: ☐

An 'Entry' window is also open, titled 'Entry - Meal Proposal: 0.5 hours per day- ST'. It contains a table with the following data:

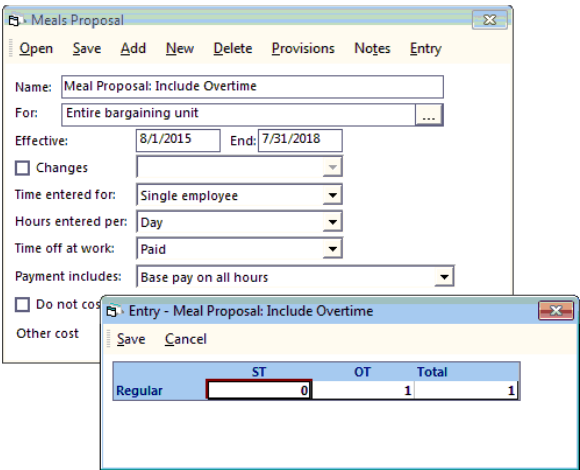
	ST	OT	Total
Regular	.5	0	0.5

The information that will appear in your Base Cost report would be as follows:

Meal Proposal	\$(13,036)	10 employees x .5 hour meal per day x \$10.00 per hour x Days per year
Meal Proposal	1,304 hours	10 employees x .5 hour meal per day x Days per year
Hours Paid	22,943 hours	10 employees x 44 hours per week x Weeks per year

Example 2: Proposal to Include Overtime

If you enter a proposal to include the overtime hours when calculating the cost for the meal period by changing the **Payment Includes** option from Base pay on straight-time hours to Base pay on all hours, , the total number of hours paid will remain the same.



The information that will appear in your Base Cost report would be as follows:

Meal Proposal	\$13,036	10 employees x 1 hour meal per day x \$10.00 per hour Days per year
Meal Proposal	2,607 hours	10 employees x 1 hour meal per day x Days per year
Hours Paid	22,943 hours	10 employees x 45 hours per week x Weeks per year

10.3Time Off Away From Work

Includes Sick, Vacation, Personal Days, and Other.

You enter Time Off Away From Work provisions in order to enable Bargaining Power to separate productive time from unproductive time in Benchmark Statistics, or to enable the calculation of the marginal costs of proposals you may make to change either the number of hours, or the manner in which you pay employees for this time.

By default, it is assumed the hours that comprise Time Off Away From Work are included in the hours you entered in the Time Paid Entry matrix in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). For more information, see the *Time Off Away From Work Advanced Topic: How Time Off Away From Work Interacts with Time Paid*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes**. You may only select Annually. (See **Proposal Changes** located in *Time Off Away From Work Proposals*.)

Varies by: Check this box if Time Off Away from Work varies by a characteristic in your employee database, then select the characteristic from the combo box.

Time entered for: Select whether the provision or proposal amount you enter is for a Single employee or the Entire group of employees selected in For.

Time per year entered as: Select from the combo box whether you will enter hours, days or weeks per year. Note that when you enter days or weeks, you imply a number of hours, and in the ***Payment includes*** combo box, you instruct Bargaining Power as to how to handle these implied hours.

Time off away: Select from the combo box whether Time Off Away From Work is paid or unpaid. Enter unpaid hours either if your current contract's Time Off Away From Work is unpaid and you expect to enter a proposal to pay for these hours or if you want the unpaid hours to be reported on in the Time Details section of your Cost reports. Unpaid hours should not be included in Time Paid scenarios or proposals.

Payment includes: Select from the combo box whether payment for Time Off Away From work includes:

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in ***Payment includes***, see Section 10.2, *Time Off At Work*.

If your Time Off Away from Work provisions or proposals include allowances which are not always fully taken, enter the actual usage in the provision or proposal. However, if you offer payment for all or some of the allowed time that is not taken, you should alter the usage amount accordingly. For additional information, see the *Time Off Away From Work Advanced Topic: Allowance and Usage*.

Time Off Away From Work Entry

Enter the amounts of Time Off Away From Work in the matrix created based on the information you provide in the description dialog box. Enter the time per year in the increment you selected (hours, days or weeks). If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, Annually, the years comprise the matrix columns.

Proposals

Time Off Away from Work proposals can include two pieces of information that are not contained in current contract provision description entry screens. Also, with proposals, you can alter the hours or payment options over the duration of the contract period by utilizing the Effective and End Dates.

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal some cost, or, by entering a negative number, some savings, related to a loss or gain in productivity. Such a cost or savings might represent the impact of the increased or decreased productive time on revenues, or profits, or operational costs. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year. The cost that you enter is treated as a Flat amount per group even though you enter proposal data for a single employee.

Proposal Changes: If your proposal changes the actual Time Off Away from Work used, or the manner of payment during the settlement period in a way other than annually, you can enter the changes by utilizing the Effective and End dates. Enter the proposal beginning with the effective date of the settlement, and then enter the end date as the month prior to the first change. Enter the first change as a separate proposal, altering the effective date to the month of the change, and, if necessary, altering the end date to the month prior to the next change. If required, you can continue this as frequently as monthly throughout the settlement duration.

Time Off Away From Work

Advanced Topic: Allowance and Usage:

If you have Time Off Away From Work allowances that vary from their actual usage and you pay employees partially or fully for the Time Off they are allowed that they do not take, you can modify your entry as demonstrated in the following example:

- You offer twelve sick days per year per employee.
- You pay employees for 50% of the difference between the number of sick days they actually take and the number they are allowed.
- On average, employees take eight sick days.
- Enter sick days as 10 per year. This will account for the 8 taken and one half of the four not taken, but compensated at 50%.
- Make sure that the hours for the two paid days (one half of the four not taken) are included in the hours in the Time Paid Entry matrix in the Hours tab.

Time Off Away From Work: Advanced Topic: How The Cost for Time Off Away From Work is Derived

To derive the cost for a Time Off Away From Work provision Bargaining Power uses the Payment Includes selection.

- You have a bargaining unit of 10 employees.
 - The base pay for every employee is \$20.00 per hour.
1. You pay your employees to work 40 hours per week straight-time and 4 hours per week overtime.
 2. In addition, you pay 5 of the 10 employees \$0.75 per hour to work an evening shift 40 hours per week. You enter those hours in the Time Paid Entry matrix in the Hours tab as follows:

The screenshot shows the 'Time Paid' software interface. The main window has a menu bar with 'Open', 'Save', 'Add', 'New', 'Delete', 'Notes', and 'Entry'. Below the menu bar, there are fields for 'Name' (Time Paid: 40 hours ST/ 4 hours OT), 'For' (Entire bargaining unit), 'Effective' (4/1/2017), 'End' (3/31/2021), 'Enter for' (Single employee), 'Changes' (checkbox), 'Hours entered per' (Week), and 'Days/week' (5). Below these fields, there is a 'Straight-time Multiples' section with 'OT' set to 1.5. A smaller dialog box titled 'Entry - Time Paid: 40 hours ST/ 4 hours OT' is open in front of the main window. This dialog box has 'Save' and 'Cancel' buttons and a table with the following data:

	Hrs Incl	ST	OT	Total
Regular	<input checked="" type="checkbox"/>	40	4	44
Shift	<input checked="" type="checkbox"/>	40		40

3. You have a current contract provision where you pay your employees for 2 weeks of vacation per year.

The image shows two overlapping software windows. The top window, titled 'Vacation Provision', has a menu bar with 'Open', 'Save', 'Add', 'New', 'Delete', 'Notes', and 'Entry'. It contains the following fields: 'Name:' with the value 'Vacation Provision: 2 Weeks Per Year'; 'For:' with a dropdown menu showing 'Entire bargaining unit'; 'Effective:' with a date field '4/1/2017' and 'End:' with a date field '3/31/2021'; a checkbox 'Changes' with a dropdown arrow; a checkbox 'Varies by' with a dropdown arrow; 'Time entered for:' with a dropdown menu showing 'Single employee'; 'Time entered as:' with a dropdown menu showing 'Weeks' and the text 'per Year'; and 'Time off away:' with a dropdown menu showing 'Paid'. The bottom window, titled 'Entry - Vacation Provision: 2 Weeks Per Year', has a menu bar with 'Save' and 'Cancel'. It contains a label 'Enter value:' followed by a text input field containing the number '2'.

Bargaining Power will derive the cost for the vacation provision based on your selection in Payment Includes.

If you choose...	Cost for vacation will include...
Base pay on straight-time hours only	10 employees x \$20.00 per hour x 80 vacation hours per year
Base pay on all hours	10 employees x \$20.00 per hour x 80 vacation hours per year + Average hourly overtime
All pay and benefits on straight-time hours only	10 employees x \$20.00 per hour + \$0.75 per hour x 80 vacation hours per year
All pay and benefits on all hours	10 employees x \$20.00 per hour + \$0.75 per hour x 80 hours per year + Average hourly overtime

Time Off Away From Work: Advanced Topic: How Time Off Away From Work Interacts with Time Paid

How Time Off Away From Work Provisions Interact with Time Paid

By default, it is assumed the hours you enter in a time off provision are included in the hours you entered in Time Paid in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). This means Bargaining Power will designate the time off hours entered in Time Paid as unproductive, but the total number of hours paid remains the same. For more information, see **Example : Time Off Hours Are Included in Time Paid.**

In the following example,

- You have a bargaining unit of 10 employees.
- Each employee receives \$10.00 per hour base pay.
- You pay your employees to work 2080 hours per year straight-time and 208 hours per year overtime.
- You have a current contract provision where pay your employees for 40 hours of vacation per year. Employees are paid their base pay on all hours for the vacation.

Example :Time Off Hours Are Included in Time Paid

1. You enter the total number of hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below.

The screenshot displays the 'Time Paid' software interface. The main window has a menu bar with 'Open', 'Save', 'Add', 'New', 'Delete', 'Notes', and 'Entry'. Below the menu, there are fields for 'Name' (Time Paid: 2080 Hours Per Year ST/ 208 OT), 'For' (Entire bargaining unit), 'Effective' (4/1/2017 to 3/31/2021), 'Enter for' (Single employee), and 'Hours entered per' (Year, 5 Days/week). A 'Straight-time Multiplier' field is set to 1.5. An 'Entry' dialog box is open, showing a table with columns 'Hrs Incl', 'ST', 'OT', and 'Total'. The 'Regular' row shows 2080 hours for ST and 208 hours for OT, totaling 2288 hours.

	Hrs Incl	ST	OT	Total
Regular		2080	208	2288

- You enter the 40 hours of vacation per employee in the Vacation Provision Entry dialog box, as shown below.

The image shows two overlapping software dialog boxes. The background box is titled 'Vacation Provision' and contains the following fields: 'Name' (Vacation Provision:40 Hours Per Year Per Employee), 'For' (Entire bargaining unit), 'Effective' (4/1/2017), 'End' (3/31/2021), 'Changes' (checkbox), 'Varies by' (checkbox), 'Time entered for' (Single employee), 'Time entered as' (Hours per Year), 'Time off away' (Paid), and 'Payment includes' (Base pay on all hours). The foreground box is titled 'Entry - Vacation Provision:40 Hours Per Year Per Employee' and contains a single field 'Enter value:' with the number '40' entered.

In this scenario, Bargaining Power considers 40 hours per year of regular, straight-time hours and 4 hours of overtime as unproductive, and 2036 hours per year as productive. The total number of hours paid remains the same.

The information that will appear in the Time Details section of your Base Cost report would be as follows:

Hours Paid	22,880 hours	10 employees x 2080 hours ST per year + 208 OT hours per year
Total Paid Time Off	440 hours	10 employees x 40 hours ST per year + 4 OT hours per year

How Time Off Away From Work Proposals Interact with Time Paid

By default, it is assumed the hours you enter in a time off proposal are included in the hours you entered in the Hours tab, in their appropriate matrix cells (i.e., included in regular time, hours-based differential time, overtime, and double time, as appropriate). This means Bargaining Power will designate the time off hours entered in Time Paid as unproductive, but the total number of hours paid remains the same. For more information, see **Example 1: Proposal to Decrease Time Off** and **Example 2: Proposal to Include Overtime**

The two examples that follow are cost against a base cost report that consists of the following data:

Current Contract Base Data

- You have a bargaining unit of 10 employees. Each employee receives \$10.00 per hour base pay.
 - You pay your employees to work 40 hours per week straight-time and 4 hours per week overtime.
 - You have a current contract provision where you pay your employees for 40 hours of vacation per year. Employees are paid their base pay on straight-time hours while on vacation.
1. You enter the total number of hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below.

Time Paid

Open Save Add New Delete Notes Entry

Name: Time Paid: 40 hours ST/ 4 hours OT

For: Entire bargaining unit

Effective: 4/1/2017 End: 3/31/2021

Enter for: Single employee

☐ Changes

Hours entered per: Week

Straight-time Multiplier: OT 1.5 DT 2

Entry - Time Paid: 40 hours ST/ 4 hours OT

Save Cancel

	Hrs Incl	ST	OT	Total
Regular	<input checked="" type="checkbox"/>	40	4	44

2. You enter the 40 hour vacation provision in the Vacation Provision Entry dialog box, as shown below. You select the ***Payment Includes*** option Base pay on straight-time hours only.

The image shows two overlapping software dialog boxes. The background box is titled "Vacation Provision" and contains the following fields: "Name:" with the value "Vacation Provision:40 Hours Per Year Per Employee"; "For:" with the value "Entire bargaining unit"; "Effective:" with "4/1/2017" and "End:" with "3/31/2021"; checkboxes for "Changes" and "Varies by" (both unchecked); "Time entered for:" with "Single employee"; "Time entered as:" with "Hours" and "per Year"; "Time off away:" with "Paid"; and "Payment includes:" with "Base pay on all hou...". The foreground box is titled "Entry - Vacation Provision:40 Hours Per Year Per Employee" and contains a single field "Enter value:" with the value "40".

In this scenario, Bargaining Power considers 40 hours per year of regular, straight time as unproductive and 2045 hours per year of regular, straight time as productive, per employee. The total number of hours paid remains the same.

The information that will appear in your Base Cost report would be as follows:

Vacation Provision	\$235,857	10 employees x 40 vacation hours per year x \$10.00 per hour x 40 hours per week x Weeks per year
Vacation Provision	400 hours	10 employees x 40 vacation hours per year
Hours Paid	22,943 hours	10 employees x 44 hours per week x Weeks per year

Example 1: Proposal to Increase Time Off

The screenshot shows a 'Vacation Proposal' application window. The 'Name' field contains 'Vacation Proposal: Increase to 45 hours'. The 'For' field is set to 'Entire bargaining unit'. The 'Effective' date is '4/1/2018' and the 'End' date is '3/31/2021'. There are checkboxes for 'Changes' and 'Varies by'. The 'Time entered for' is 'Single employee', 'Time entered as' is 'Hours per Year', and 'Time off away' is 'Paid'. The 'Payment includes' dropdown is set to 'Base pay on straight-time hours only'. A checkbox for 'Do not cost ch' is checked. An 'Entry' dialog box is open, showing 'Enter value:' with '45' entered.

If you enter a proposal to increase the number of vacation hours paid from 40 hours per year to 45, the total number of paid time off hours will increase, but the total number of hours paid will remain the same.

The information that will appear in your Base Cost report would be as follows:

Vacation Proposal	\$500	10 employees x 5 vacation hours x \$10.00 per hour x
Vacation Proposal	450 hours	10 employees x 45 vacation hours
Hours Paid	22,943 hours	10 employees x 44 hours per week x Weeks per year

Example 2: Proposal to Include Overtime If you enter a proposal to include the overtime hours when calculating the cost for the vacation by changing the **Payment Includes** option from Base pay on straight-time hours to Base pay on all hours, , the total number of hours paid will remain the same.

Vacation Provision

Open

Save

Add

New

Delete

Notes

Entry

Name:

Vacation Provision: 40 Hours Per Year Per Employee

For:

Entire bargaining unit

Effective:

4/1/2017

End:

3/31/2021

Changes

Varies by

Time entered for:

Single employee

Time entered as:

Hours

Time off away:

Paid

Payment includes:

Base pay on

Entry - Vacation Provision: 40 Hours Per Year Per Employee

Save

Cancel

Enter value:

40

The information that will appear in your Base Cost report would be as follows:

Vacation Proposal	\$400	10 employees x \$10.00 per hour 4 additional vacation hours
Vacation Proposal	440 hours	10 employees x 40 vacation hours + 4 additional vacation hours
Hours Paid	22,943 hours	10 employees x 45 hours per week x Weeks per year

10.3.1 Holidays

You can enter a Holiday provision and Bargaining Power will pay the employees that do NOT work the holidays based on your selection in ***Payment Includes***. In addition, if you check the ***Holidays are worked*** check box, the cost for the Holiday provision will also include the employees that do work on holidays based on your selection in ***Payments for holidays worked*** and the entries made in the Entry dialog box.

The costs or savings associated with worked holidays will be displayed on your report as a separate line item with the same name as the associated holiday provision or proposal. The hours associated with worked holidays also show up separately in Time Details.

The hours that comprise all unworked holidays should be included in the Time Paid matrix in the Hours tab, in their appropriate matrix cells. However, the hours that comprise worked holidays should not be included in the Time Paid matrix in the Hours tab. For more information, see the *Holidays Advanced Topic: Worked Holidays* in this section.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check ***Changes***. You may only select Annually. (See **Proposal Changes** located in Holiday Proposals.)

Days entered for single employee: Holidays can only be entered for a Single employee -- they cannot be entered for the Entire group, or as a Flat amount per group.

Payment includes: Select from the combo box whether holiday pay includes

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in ***Payment includes***, see Section 10.2, *Time Off At Work*.

Holidays are worked: Check this box if any employees in the selected group work any holidays you enter. Note that Bargaining Power assumes worked holidays have NOT been included in the Time Paid matrix, in the Hours tab. For more information see the *Holidays Advanced Topic: Worked Holidays* in this section.

Payments for holidays worked: If you selected the ***Holidays are worked*** check box, choose from the combo-box whether the payment for the time that holidays are worked include:

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in ***Payment includes***, see Section 10.2, *Time Off At Work*.

Holidays Entry

Enter information about holidays in the matrix created based on the information you provide in the description dialog box.

If you did not select the ***Holidays are worked*** box, the matrix will contain the following columns:

Holidays	Annual # of holidays
All Holidays	11

Holiday: Enter a name for the holiday, or group of holidays.

Annual # of holidays: Enter the number of days.

You may just want to enter a single row, so you may enter Paid Holidays in the first row of the Holidays column, and 11 in the Annual number of holidays worked, if that is the annual number of holidays for a single employee. On the other hand, you may want to enter a row for each holiday, in which case, you could name each holiday in the rows of the Holidays column, and enter the number 1 for each in the Annual # of holidays column. If, for example, you offer as holidays both New Year’s Day and half the day before, you could enter New Year’s as the Holiday, and 1.5 as the Annual # of holidays.

If you checked that ***Holidays are worked*** in the Holidays description dialog box, the matrix contains the following columns:

Holidays	Annual # of holidays	# of employees that work	ST multiple for holidays worked	Pyramiding
Major Holidays	5	800	2	None
Minor Holidays	6	1250	1.5	None

Holidays: Enter a name of the holiday, or group of holidays. In this case, you may want to group holidays in which the information in the following columns is the same.

Annual # of holidays: Enter the number of days for each holiday or holiday grouping.

of employees that work: Enter the number of employees that work per holiday.

ST (straight-time) multiple for holidays worked: Enter the straight-time multiple paid for worked holidays. This number is *in addition* to holiday pay. For example, if employees receive a day’s holiday pay plus time-and-a-half for working the holiday, enter 1.5 in this column.

Pyramiding: If you enter a straight-time multiple other than 1 in the ***ST multiple for holidays worked*** column, and you selected ***Payment for holidays worked*** includes All pay and benefits on all hours in the Holiday description dialog box, you must choose one of the following options from the combo-box:

- No pyramiding means that the pay for holidays worked will be calculated at the entered straight-time multiple for straight-time daily hours only.
- Single pyramiding means that the pay for holidays worked will be calculated at the entered straight-time multiple for all daily hours, including the average daily overtime, double-time or premium time hours you entered in the regular row of the Time Paid Entry matrix.
- Double pyramiding means the pay for holiday worked will be calculated at the entered straight-time multiple for all daily hours including the average daily overtime, double-time or premium time hours you entered in the regular row of the Time Paid Entry matrix. In addition, the straight-time multiple that you entered for holidays worked will be applied to the average daily overtime, double-time or premium time hours.

Holidays Advanced Topic: Worked Holidays

To derive the cost for a Holidays provision Bargaining Power will pay the employees that do NOT work the holidays based on your selection in ***Payment Includes***. In addition, if you check the ***Holidays are worked check box***, it will also pay the employees that work on holidays based on your selection in ***Payments for holidays worked*** and the entries made in the Entry dialog box.

Bargaining Power assumes the following:

- The hours that comprise all unworked holidays are assumed to be included in the hours you entered in the Time Paid Entry matrix in the Hours tab. Bargaining Power will treat these hours as it does for all other time off provisions. For more information, see **Example 1: Holidays are Not Worked**.
- The hours that comprise worked holidays are NOT included in the hours you entered in the Time Paid Entry matrix in the Hours tab. These hours will be added to the total number of hours paid as shown in Benchmark Statistics and the Time Details report. For more information see **Example 2: Worked Holidays**.

In the following examples,

- You have a bargaining unit with 10 employees.
- You pay your employees to work 2085 hours per year straight-time.
- You have a Holiday provision where all employees receive 9 holidays.

Example 1: Holidays are Not Worked

1. You enter all the hours you pay for in the Time Paid Entry matrix in the Hours tab, as shown below:

The screenshot shows the 'Time Paid' window with the following details:

- Name: Time Paid: 2085 Hours Per Year
- For: Entire bargaining unit
- Effective: 4/1/2017 to 3/31/2021
- Enter for: Single employee
- Hours entered per: Year, 5 Days/week
- OT: 1.5

The 'Entry - Time Paid: 2085 Hours Per Year' window shows the following table:

	Hrs Incl	ST	OT	Total
Regular		2085		2085

2. You enter a Holiday provision where all employees receive 9 holidays, but no one works on holidays.

In this scenario, the holiday hours are included in the total number of hours paid.

The screenshot shows the 'Holidays Provision' window with the following details:

- Name: 9 Holidays
- For: Entire bargaining unit
- Effective: 4/1/2017 to 3/31/2021
- Days entered for: Single employee
- Payment includes: Base pay on straight-time hours only
- Holidays are worked: (unchecked)

The 'Entry - 9 Holidays' window shows the following table:

Holidays	Annual # of holidays
All Holidays	9

The information that will appear in the Time Details section of your Base Cost report would be as follows:

Hours Paid	20,850 hours	10 employees x 2085 hours per year
Total Paid Time Off	720 hours	10 employees x 9 holidays x 8 hours per holiday

Example 2: Worked Holidays

- 1. You enter a Holiday provision where all employees receive 9 holidays and 2 of the 10 employees work on the holidays.

Holidays Proposal

OpenSaveAddNewDeleteProvisionsNotesEntry

Name:9 Holidays

For:Entire bargaining unit

Effective:8/1/2015End:7/31/2018

☐ Changes

Days entered for:Single employee

Payment includes:Base pay on straight-time hours only

☒ Holidays are worked

Payment for holidays worked:Base pay on straight-time hours only

Entry - 9 Holidays

SaveCancel

Holidays	Annual # of holidays	# of employees that work	ST multiple for holidays worked	Pyramiding
All Holidays	9	2	1.5	None

In this scenario, the holiday hours that are not worked are included in the total number of hours paid, but the worked holiday hours are added to the total number of hours paid.

The information that will appear in the Time Details section of your Base Cost report would be as follows:

Hours Paid	20,994 hours	10 employees x 2085 hours per year + 9 holidays x 8 hours per holiday x 2 employees
Total Paid Time Off	720 hours	10 employees x 9 holidays x 8 hours per holiday
Total Worked Holiday Time	144 hours	2 employees x 9 holidays x 8 hours per holiday

Proposals

Holiday proposals enable you to enter additional information that is not contained in current contract provision description entry screens. In addition, you can alter the number of holidays or holiday payment options over the duration of the contract period by utilizing the Effective and End Dates.

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal some cost, or, by entering a negative number, some savings, related to a loss or gain in productivity. Such a cost or savings might represent the impact of the increased or decreased productive time on revenues, or profits, or operational costs. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year. The cost that you enter is treated as a Flat amount per group even though you enter proposal data for a single employee.

Proposal Changes: If your proposal changes the actual number of annual holidays or the manner of payment during the settlement period in a way other than annually, you can enter the changes by utilizing the Effective and End dates. Enter the proposal beginning with the effective date of the settlement, and then enter the end date as the month prior to the first change. Enter the first change as a separate proposal, altering the effective date to the month of the change, and, if necessary, altering the end date to the month prior to the next change. If required, you can continue this as frequently as monthly throughout the settlement duration.

10.3.2 Bereavement

Bereavement leave, also called funeral pay, can only be entered for the Entire group. Therefore, you should enter the total number of days or hours you expect to be taken by the selected group.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes**. Annually appears in the combo-box. (See **Proposals Changes** located in Bereavement Proposals.)

Time entered for entire group: Bereavement time can only be entered for the entire selected group of employees -- which means it will automatically be changed if the employee count in the group changes. It cannot be entered for a single employee or as a flat amount per group.

Payment includes: Select from the combo box whether payment for bereavement leave includes:

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in **Payment includes**, see Section 10.2, *Time Off At Work*.

Annual number of: Choose from the combo box between hours and days.

Bereavement Entry

Depending on the choices you made in the Bereavement description dialog box, enter the annual bereavement leave in hours or days in the entry matrix. If you select ***Changes***, Annually, the years comprise the matrix columns.

Proposals

Bereavement proposals enable you to enter additional information that is not contained in current contract provision description entry screens. In addition, you can alter the Bereavement time or payment options over the duration of the contract period by utilizing the Effective and End Dates.

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal some cost, or, or by entering a negative number, some savings, related to a loss or gain in productivity. Such a cost or savings might represent the impact of the increased or decreased productive time on revenues, or profits, or operational costs. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year. The cost that you enter is treated as a flat amount per group even though you enter proposal data for the Entire group.

Proposal Changes: If your proposal changes the Bereavement leave time or the manner of payment during the settlement period in a way other than annually, you can enter the changes by utilizing the Effective and End dates. Enter the proposal beginning with the effective date of the settlement, and then enter the end date as the month prior to the first change. Enter the first change as a separate proposal, altering the effective date to the month of the change, and, if necessary, altering the end date to the month prior to the next change. If required, you can continue this as frequently as monthly throughout the settlement duration.

10.3.3 Jury Duty

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes**. You may only select Annually. (See **Proposal Changes** located in Jury Duty Proposals.)

Time entered for entire group: Jury duty time can only be entered for the entire selected group of employees -- which means it will automatically be changed if the employee count in the group changes. It cannot be entered for a single employee or as a flat amount per group. However, in the entry matrix, you enter both the number of hours or days per jury duty assignment per employee, as well as the number of incidences of jury duty for the entire group.

Payment includes: Select from the combo box whether payment for Jury Duty includes:

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in **Payment includes**, see Section 10.2, *Time Off At Work*.

Enter number of: Choose from the combo box between Hours and Days.

Pay difference between normal pay and jury duty pay: If you check this box, Bargaining Power will calculate the difference between the normal daily or hourly pay (as indicated by your selection in **Payment includes**) and jury duty pay that employees receive from the government.

Jury duty pay: If you check **Pay difference between normal pay and jury duty pay**, enter the jury duty pay (dollar amount) here and select Hour, Day or Week from the **per** combo box.

Jury Duty Entry

The entry matrix contains two rows:

- The average number of either days or hours (depending on what you selected in the description dialog box) for each incident of jury duty paid, and
- The annual number of jury duty incidences for the group per year. If you select ***Changes***, Annually, the years comprise the matrix columns.

Proposals

Jury Duty proposals enable you to enter additional information that is not contained in current contract provision description entry screens. In addition, you can alter the Jury Duty time or payment options over the duration of the contract period by utilizing the Effective and End Dates.

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal cost a cost, or (by entering a negative number, a savings) related to a loss or gain in productivity, or revenues, or some other effect of the proposal. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year.

Proposal Changes: If your proposal changes the Jury Duty leave time or the manner of payment during the settlement period in a way other than annually, you can enter the changes by utilizing the Effective and End dates. Enter the proposal beginning with the effective date of the settlement, and then enter the end date as the month prior to the first change. Enter the first change as a separate proposal, altering the effective date to the month of the change, and, if necessary, altering the end date to the month prior to the next change. If required, you can continue this as frequently as monthly throughout the settlement duration.

10.3.4 Other Time Off

The Other Time Off type allows you to define a Time Off provision or proposal that does not fit into any of the Time Off types Bargaining Power provides.

When you name and enter a Time Off type, it becomes available for selection in the Bargaining Power Time Off At Work or Time Off Away From Work menu. For information on how to create a user-defined benefit provision or proposal, see Section 8.12.1, *Creating User-Defined Provisions and Proposals*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes**. You may only select Annually. (See **Proposals Changes** located in Time Off Away From Work Proposals.)

Varies by: Check this box if Time Off Away from Work varies by a characteristic in your employee database, then select the characteristic from the combo box.

Time entered for: Select whether the provision or proposal amount you enter is for a Single employee or the Entire group of employees selected in For.

Time per year entered as: Select from the combo box whether you will enter days, weeks or months per year. Note that when you enter days or weeks, you imply a number of hours, and in the ***Payment includes*** combo box, you instruct Bargaining Power as to how to handle these implied hours.

Time off away: Select from the combo box whether Time Off Away From Work is paid or unpaid. Enter unpaid hours either if your current contract's Time Off Away From Work is unpaid and you expect to enter a proposal to pay for these hours or if you want the unpaid hours to be reported on in the Time Details section of your Cost reports. Unpaid hours should not be included in Time Paid scenarios or proposals.

Payment includes: Select from the combo box whether payment for Time Off Away From work includes:

- Base pay on straight-time hours only
- Base pay on all hours
- All pay and benefits on straight-time hours only
- All pay and benefits on all hours

For more information on the choices available in ***Payment includes***, see Section 10.2, *Time Off At Work*.

If you Time Off Away from Work provisions or proposals include allowances which are not always fully taken, enter the actual usage in the provision or proposal. However, if you offer payment for all or some of the allowed time that is not taken, you should alter the usage amount accordingly. For additional information, see the *Time Off Away From Work Advanced Topic: Allowance and Usage*

Time Off Away From Work Entry

Enter the amounts of Time Off Away From Work in the matrix created based on the information you provide in the description dialog box. Enter the time per year in the increment you selected (hours, days or weeks). If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, Annually, the years comprise the matrix columns.

Proposals

Time Off Away from Work proposals can include two pieces of information that are not contained in current contract provision description entry screens. Also, with proposals, you can alter the hours or payment options over the duration of the contract period by utilizing the Effective and End Dates.

Do not cost change in productive hours: Check this box to prevent Bargaining Power from calculating the imputed economic costs of the proposed change in productive hours. If you do not check this box Bargaining Power assumes that you want to value any change in productive hours at the cost of labor, and will include such costs as “Imputed Economic Costs” in your report. Your cash costs may not change since the employees are paid whether they are productive or not. However, Bargaining Power will redistribute costs from Pay and Benefit line items to time-off line items in the report to show the change in amounts for productive vs. unproductive time.

You may attach proposals to account for a change in hours or number of employees that will accompany a change in productive time. The costs shown for these would be real financial costs or savings. If you do not do this, you may see the imputed costs, or value of the lost or gained time in your report.

For more information, see Section 12.2.3, *Imputed Economic Costs*.

Other cost: If your productive hours change, you may want to include in a proposal some cost, or, by entering a negative number, some savings, related to a loss or gain in productivity. Such a cost or savings might represent the impact of the increased or decreased productive time on revenues, or profits, or operational costs. You can enter the amount here, and then indicate in the *per* combo box whether the cost you enter is per day, week, month or year. The cost that you enter is treated as a Flat amount per group even though you enter proposal data for a single employee.

Proposal Changes: If your proposal changes the actual Time Off Away from Work used, or the manner of payment during the settlement period in a way other than annually, you can enter the changes by utilizing the Effective and End dates. Enter the proposal beginning with the effective date of the settlement, and then enter the end date as the month prior to the first change. Enter the first change as a separate proposal, altering the effective date to the month of the change, and, if necessary, altering the end date to the month prior to the next change. If required, you can continue this as frequently as monthly throughout the settlement duration.

10.4 Time Paid Proposals

Time Paid proposals correspond to the Time Paid provisions in the Hours tab. For more information on entering Time Paid scenarios in the Hours tab, see *Chapter 4, Hours*. Here, you can enter proposals related to changes in operations or work rules that alter the number of hours paid. Marginal costs are automatically calculated compared to the Time Paid scenario.

You can create proposals in Time Paid to alter the data in Time Paid in the Hours tab only for the change in hours due to changes in hours worked. For changes in hours due to changes in Time Off, create Time Off proposals so that Bargaining Power can derive accurate Benchmark Statistics and Time Details data regarding productive versus non-productive time.

Days/week: If employees in the selected group do not work 5-day weeks, you can change the amount in the Days/week entry box in Time Paid or in the Preferences dialog box.

Straight-time Multiples: You can change the default straight-time multiples for Overtime (1.5), Double time (2), and Premium time (3).

Name: Enter a unique name for the proposal, up to 50 characters.

For: Click the Ellipsis button (...) to choose the Entire bargaining unit, or any sub-group.

Effective / End date: The default dates are the beginning and end of the settlement period, but you can override them and enter your own.

Changes: If the hours change over time, check this box, and select the timing of the change(s) from the combo box.

Enter for: From the combo box, select Entire group or Single employee.

Hours entered per: Using the combo box select from among Day, Week, Month or Year.

When you have completed filling in the Time Paid proposal dialog box, select Entry from the Toolbar.

Time Paid Proposals Entry

The Entry dialog box consists of a matrix tailored to match the information you entered in Classifications in the Employee Database tab and in the Time Paid proposal description dialog box.

The Time Paid matrix columns are made up of Straight Time, and the other earning types -- Overtime, Double time, and Other premium time (XT) -- for which the selected group is eligible.

Matrix rows begin with Regular and are followed by the hours-based differentials for which the selected group is eligible. As with the Time Paid Entry matrix in the Hours tab, hours entered for differentials may be unique, or may be included in the regular hours.

10.5 Workforce

Workforce includes:

- **Total number of employees:** Proposals to change the size or composition of the workforce from what is entered in the Total Number of Employees dialog box located in Workforce Dynamics tab.
- **Turnover:** Proposals to change the turnover of employees from what is entered in the Turnover dialog box in Workforce Dynamics tab.
- **Replacements:** Proposals to change the way replacements are made -- through new hires, layoffs, etc. -- from what is entered in the Replacements dialog box in Workforce Dynamics tab.
- **Retirees:** Proposals to change the size or composition of the retiree population -- by altering the percentage of attrition due to retirees or by altering the mortality rates of the retiree population as entered in the Retirees dialog box in Workforce Dynamics tab.
- **Classifications:** Proposals to take any of three actions:

Create classifications: Create new classifications and populate them either by expanding the current workforce via a Total Number of Employees proposal, or by moving existing employees into the new classification via a Replacements proposal.

Combine classifications: Combine classifications so that previously distinguished groups of employees receive the same pay, time or benefit provisions or proposals during the settlement period. You can also enter a Total Number of Employees proposal which changes the count of the new, combined classification from the sum of its components to another number.

Eliminate classifications: Eliminate classifications by terminating employees or transferring them to other classifications.

10.5.1 Total Number of Employees-Proposals

Enter proposals to change the Workforce Dynamics entered in the Workforce Dynamics tab.

Name: Enter a unique name for the proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Effective / End Dates: The default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Total number of employees as of [your Effective Date of Data]: This number is system-generated from Import or Manual Entry. It is shown for information only, and cannot be changed here.

Changes: If you expect the number of employees to change over time, check this box, and select the timing of the change(s) from the combo box.

Total Number of Employees Entry

Depending on the choices you make in the Total Number of Employees description dialog box, the Entry dialog box will contain either:

- A single row matrix; or
- If you selected **Changes** in the description dialog box your choices will comprise the columns.

10.5.2 Turnover-Proposals

Enter proposals to change the Workforce Dynamics entered in the Workforce Dynamics tab.

Name: Enter a unique name for the proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Note: There is no **Vary by** option in Turnover. If turnover varies by length of service, or age, or any other characteristic in your employee database, you can create the appropriate population in the **For** dialog box. For more information, see *Group Creation* in Section 5.1.1, *For*.

Effective / End Date: The default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Attrition/Retention: Select from the combo box whether turnover is expressed as Attrition, employees that leave or Retention, employees that stay.

Changes: If you expect the number of employees to change over time, check this box, and select from the combo box, the timing of the change(s).

Amount expressed as: Select from the combo box whether you will describe Attrition or Retention as a percentage or number.

per: Indicate whether the number or percentage you enter is a monthly or annual one.

Turnover Entry

Depending on the choices you make in the Turnover description dialog box, the Entry dialog box will contain either:

- A single row matrix; or
- If you selected **Changes** in the description dialog box your choices will comprise the columns.

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10.5.3 Replacements-Proposals

Enter proposals to change the Workforce Dynamics entered in the Workforce Dynamics tab.

Name: Enter a unique name for the proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Effective / End Date: The default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Decline in the total population is achieved through: Select whether you wish to achieve a decline in total population either through unreplaced attrition or through layoffs.

Unreplaced attrition only: If your labor agreement does not allow layoffs, check Unreplaced attrition only.

If this box is checked, any decline in the population that you entered in Total Number of Employees is treated as a goal to be reached as turnover allows. The Bargaining Power simulation model will not lay off employees to achieve the total number of employees. If you select this box, the Layoffs check box is grayed out and is not available for selection. See Section 7.3, *Replacements*, for additional information.

Layoffs: Check this box if a decline in the total population can be achieved through laying off employees in the group for which you are entering data. In the dropdown box, you can determine whether employees are laid off in reverse seniority or uniformly. Retirees-Proposals

Enter proposals to change the Workforce Dynamics in the Workforce Dynamics tab.

Costs of these proposals are calculated using either the Retiree Benefit contribution rates entered in the Current Contract tab, or the rates entered in a Retiree benefit proposal. The cost for the Retiree benefit proposal itself uses the retiree population described in the Retiree dialog box in the Workforce Dynamics tab...

Name: Enter a unique name for the proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subgroup.

Effective / End Date: The default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Total number of Retirees as of [your Effective date of data]: In this field, enter the number of retirees for whom benefit contributions are made as of the effective date of the data.

Mortality expressed per: From the combo box, select month or year to indicate how retirees' mortality rates will be entered.

Retirement and mortality changes: Check this box if you project that retirement as a percentage of turnover or retiree mortality rates will change over time. Select a change parameter from the combo box.

Retirees Entry

In the Entry dialog box, the columns represent the change factors. The rows define the following:

- **% of attrition:** This value indicates the percentage of employees that leave the workforce due to retirement. This information enables the Bargaining Power simulation to add new members to the retiree population over time.

- **Mortality %:** This value indicates the mortality rate of the total retiree population. This information enables the Bargaining Power simulation to reduce the number of retirees over time.

10.5.4 Create Classifications

This proposal enables you to create a new classification as you do for existing classifications in the Classifications dialog box, in the Employee Database tab.

It enables you to enter the Workforce Dynamics -- Total Number of Employees, Turnover, Replacements, and (optionally) Retirees -- for the newly created classification through additional proposals in each of those components of Time and Workforce that are effective in the same month as the Create Classification proposal. All proposals you enter for the created classification -- pay, benefits, time and legislated -- will be summed and displayed as the cost of the Create Classification proposal.

Note: The proposal cost will include current contract legislated provisions that are included in the base. Legislated proposals will use the workforce as it is comprised by all workforce proposals that are cost at the same time.

Once you have created a classification, you need to populate it by entering a Total Number of Employees proposal for it, indicating its count as of the effective date of its creation. You should also enter a Total Number of Employees proposal for the Entire bargaining unit, which increases that count by the count of the new classification.

You can change the turnover rates for classifications, via Turnover proposals effective on the same date as the creation. Combine these proposals with Replacement and/or Total Number of Employees proposals to effect the movement to and from the created classification.

Name: Enter a proposal name, up to 50 characters.

Effective date: The default effective date for the creation of the classification is the first day of the settlement. You can change this date to any date within the settlement period.

Create Classifications Entry

Name: This field is populated with the proposal name, but you can change it to a classification name if you want the two names to be different. Once the proposal is saved, the classification name, as entered in this field, will become available in all **For** menus, when you enter the Classification folder.

Work status: Use the combo box to indicate whether the classification is Full-time, Part-time, or Incentive only.

Payment: From the combo box, select either Salary or Hourly. If the classification is Incentive Only, **Payment** is not available for entry. If a classification is salaried but eligible for overtime or double time the software will derive an hourly rate based on the hours entered in Time Paid. Employees will then receive this hourly rate for any premium time hours associated with them.

Differentials: From the combo box, select one or more differentials. If you select more than one differential for the classification, the first appears, followed by an ellipsis (...).

To define a differential that does not appear in the combo box list, perform the following steps:

1. Position the cursor in the empty differential field.
2. Type the name of the differential.
3. Press the Enter key.
4. Bargaining Power inquires whether the differential is incidence based. Click Yes or No.

An incidence-based differential is one that is not paid based on hours. Hours based differentials appear as rows in the Time Paid Entry matrix, and you are required to enter the hours for which the differential is paid. For additional information, see Section 8.7, *Differentials* and Section 8.7.1, *Hours-Based Differentials*.

Incentives: Using the combo box, select one or more incentives. If more than one incentive is selected for the classification, the first appears, followed by an ellipsis (...).

To define an incentive that does not appear in the combo box list, perform the following steps:

1. Position the cursor in the empty incentive field.
2. Type the name of the incentive.
3. Press the Enter key.

Once you name an incentive for a classification, it becomes available in the combo box for all other classifications.

For employees classified as Incentive Only, you must select at least one incentive.

Earning types: These checkboxes allow you to define the categories of premium time for which the classification is eligible, in addition to Straight Time. Check one or more of the boxes.

10.5.5 Combine Classifications

This proposal component allows you to combine classifications, and to describe the characteristics of the combined classification as you do for existing classifications in Classifications dialog box in the Employee Database tab.

If you do not enter any Workforce Dynamic proposals for the classifications to be combined or for the newly-named combined classification itself, Bargaining Power will populate the combined classification with all members of the classifications you select to comprise it on the date of the combination, as though you had made the combined classification the Destination for 100% of its component classifications.

If you enter a Total Number of Employees proposal for the combined classification that is greater than the sum of its components, Bargaining Power will move in all component classification members and then either hire new employees or follow Replacement rules (promotion or demotion paths) you may enter for other classifications in the bargaining unit.

If you enter a Total Number of Employees proposal for the combined classification that is less than the sum of its components, Bargaining Power will proportionally assign members of the component classifications and lay off the rest, according to any Replacement rules that have been entered.

You can assure that Bargaining Power composes the combined classification exactly as you want by entering Turnover, Replacement and Total Number of Employees proposals for the combined classification and its components.

The cost for a Combine classification proposal will be the sum of all proposals you enter for the combined classification -- pay, benefits, time and legislated -- displayed as the marginal cost (or savings) over what the component classifications received.

Note: The proposal cost will include current contract legislated provisions that are included in the base. Legislated proposals will use the workforce as it is comprised by all workforce proposals that are cost at the same time.

Name: Enter a proposal name, up to 50 characters.

Effective date: The default effective date is the first day of the settlement. You can change this date to any date within the settlement period on which the classification is created.

Classifications to combine: Select the names of the classifications you wish to combine in order to create the new one. To select a classification, click on the name with your mouse pointer. To deselect a classification, click on the highlighted name with your mouse pointer.

Combine Classifications Entry

Name: This field is populated with the proposal name, but you can change it to a classification name if you want the two names to be different. Once the proposal is saved, the classification name, as entered in this field, will become available in all **For** menus, when you enter the Classification folder.

Work status: Use the combo box to indicate whether the classification is Full-time, Part-time, or Incentive only.

Payment: From the combo box, select either Salary or Hourly. If the classification is Incentive only, **Payment** is not available for entry. If a classification is salaried but eligible for overtime or double time the software will derive an hourly rate based on the hours entered in Time Paid. Employees will then receive this rate for any premium time hours associated with them. **Differentials:** From the combo box, select one or more differentials. If you select more than one differential for the classification, the first appears, followed by an ellipsis (...).

To define a differential that does not appear in the combo box list, perform the following steps:

1. Position the cursor in the empty differential field.
2. Type the name of the differential.
3. Press the Enter key.
4. Bargaining Power inquires whether the differential is incidence based. Click Yes or No.

An incidence-based differential is one that is not paid based on hours. Hours based differentials appear as rows in the Time Paid Entry matrix, and you are required to enter the hours for which the differential is paid. For more information, see Section 8.7, *Differentials* and Section 8.7.1, *Hours-Based Differentials*.

Incentives: Using the combo box, select one or more incentives. If more than one incentive is selected for the classification, the first appears, followed by an ellipsis (...).

To define an incentive that does not appear in the combo box list, perform the following steps:

1. Position the cursor in the empty incentive field.
2. Type the name of the incentive.
3. Press the Enter key.

Once you name an incentive for a classification, it becomes available in the combo box for all other classifications.

For employees classified as Incentive Only, you must select at least one incentive.

Earning types: These checkboxes allow you to define the categories of premium time for which the classification is eligible, in addition to Straight Time. Check one or more of the boxes.

10.5.6 Eliminate Classifications

The Eliminate Classifications dialog box enables you to select classifications to eliminate for a proposal.

Bargaining Power will then change the Total Number of Employees to zero to the selected classifications as of the effective date of the proposal. Replacement rules entered in the Workforce Dynamics tab will be followed for declines in the workforce (i.e., layoffs or unreplaced attrition only) unless you enter a Total Number of Employees Proposal for the Entire bargaining unit that reduces the population by the count of the classifications to be eliminated on the same date.

- If you have not checked ***Unreplaced attrition only*** in Replacements, and
- You do not change the Total Number of Employees for the Entire bargaining unit effective on the same date as you eliminate a classification by the same number.

Employees in the eliminated classification will be laid off and the remaining classifications will be proportionally increased by the count of the eliminated classification, according to applicable replacement rules.

Name: Enter a proposal name, up to 50 characters.

Effective date: The default effective date is the first day of the settlement. You can change this date to any date within the settlement period on which the classification is created.

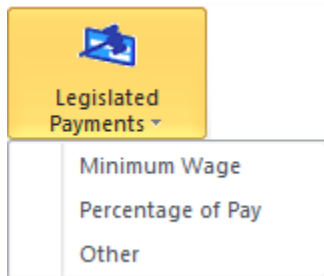
Classifications to eliminate: Select the names of the classifications you wish to eliminate. To select a classification, click on the name with your mouse pointer. To deselect a classification, click on the highlighted name with your mouse pointer.

The image shows two overlapping dialog boxes from a software application. The background dialog is titled 'Combine Classifications' and has a menu bar with 'Open', 'Save', 'Add', 'New', 'Delete', 'Negot', and 'Entry'. It contains a 'Name' field with the text 'Combine Clinical Nurse 2 and 3: Clinical Nurse 2A', an 'Effective' date field with '4/1/2018', and a list titled 'Classifications to combine'. The list contains 'Clinical Nurse 1', 'Clinical Nurse 2', 'Nurse Midwife', 'Staff/CR Nurse', and 'Clinical Nurse 3', with 'Clinical Nurse 2' and 'Clinical Nurse 3' highlighted in blue. The foreground dialog is titled 'Classification' and has a 'Save' button and a 'Cancel' button. It contains a 'Name' field with the same text as the background dialog, a 'Work status' dropdown menu set to 'Full-time', a 'Payment' dropdown menu set to 'Hourly', a 'Differential' dropdown menu set to 'Education', and an 'Incentives' section with a 'Learning Types' dropdown menu and three checkboxes: 'Overtime' (checked), 'Double time' (unchecked), and 'Premium time' (unchecked).

11 Legislated Payments

Legislated payments can be entered in order to see what impact proposed changes to your collective bargaining agreement, or projected changes in your workforce will have on payments you must make. In addition, you can use this section of Bargaining Power to project the economic impact of impending changes in the mandated payments themselves.

Bargaining Power's Legislated Section contains three types of provisions and proposals:



The image shows a software interface element. At the top is a yellow rectangular button with a blue icon of a document with a folded corner. Below the icon, the text 'Legislated Payments' is written in black, followed by a small downward-pointing arrow. Below this button is a white rectangular dropdown menu with a thin grey border. The menu is open, displaying three options in blue text: 'Minimum Wage', 'Percentage of Pay', and 'Other'.

Minimum Wage: Enter projected changes in the minimum wage laws, and how you adjust to them.

Percentage of Pay: Enter mandated payments such as FICA, FUTA, Medicare, SUTA, etc.

Other: Enter other legislated payments.

11.1 Minimum Wage

If you expect the Minimum Wage to change during the base or settlement period, you can enter information about the change and how you adapt to that change. You may select to raise all employees' pay rates to the minimum wage, or alternatively, you may choose to maintain pay differentials among employees. You do not have to enter the current Minimum Wage regulations under which you operate, since your pay practices reflect them.

If you are using a multi-year base, and you expect the minimum wage to change during the settlement period, enter a Minimum Wage provision that reflects your current contract's method of adapting to the change. The increased minimum wage cost is reflected in the multi-year base cost. You might enter a proposal with the same projected change in the minimum wage, but a different method of adapting to the change.

The Minimum Wage cost Bargaining Power calculates includes the effect of the minimum wage on all other provisions and proposals that you enter. It is assumed that the minimum wage alters the base pay, so the increased cost of all provisions and proposals that are a percentage of base pay are included in the cost of the Minimum Wage provision or proposal. The base pay as affected by a Minimum Wage provision is used in the calculation of legislated payments. The base pay as affected by a Minimum Wage proposal is used in the calculation of both the other Legislated payment proposals concurrently selected in a settlement or collection of proposals. If you enter a Minimum Wage provision, the marginal costs of pay proposals you enter will be calculated as the cost above the Current Contract pay as affected by the Minimum Wage provision.

If you enter a base pay proposal that results in a pay rate below a minimum wage provision you have entered for the same group of employees at the same time, during costing, Bargaining Power will issue an error message, and will not cost the proposal or a settlement that includes it until you correct the error.

Note that Minimum Wage Provisions or Proposals can only be applied to employees whose classifications are designated as paid hourly.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If you expect the Minimum Wage to change during the base or settlement period, check **Changes** and select the timing of the change(s) from the combo box.

Varies by: Check this box if Minimum Wages vary by a characteristic in your employee database, then select the characteristic from the combo box.

Maintain differentiation by: Select this checkbox if you wish to maintain pay differentiations among or within groups of employees. If you do not check this box, all employees are raised to the minimum wage without regard to any pay progressions or current differences among pay plans in effect (see “No maintenance of differentiation” in the *Minimum Wage: Example*). If you do check this option, you can choose to maintain differentiation by a \$ amount or % of pay.

Minimum Wage Entry

Enter the minimum wage amount(s) in the matrix created based on the information you provide in the description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

Minimum Wage Example

The table below shows how Bargaining Power treats the three Minimum wage options.

NOTE: the current help screen says \$5.00 below so please fix it in the help. The manual seems OK.

The example is based on a Minimum wage increase to \$8.00 per hour. The same result would be obtained if the rows represented pay rates for different classifications rather than pay for different anniversaries in a single pay progression.

Length of Service	Pay Progression In Effect	No Maintenance of Differentiation	Maintain \$ Differentiation	Maintain % Differentiation
0	7.25	8.00	8.00	8.00
6	7.45	8.00	8.20	8.22
9	7.65	8.00	8.40	8.44
12	7.85	8.00	8.60	8.66
18	8.05	8.05	8.80	8.88
24	8.25	8.25	9.00	9.10

11.2 Percentage of Pay

Percentage of Pay Legislated Payments can include FICA (Federal Insurance Contributions Act), Medicare, FUTA (Federal Unemployment Tax Act), SUTA (State Unemployment Tax Act), and other mandated payments that are calculated as a percentage of employee's earnings, frequently with maximums. As in Benefits, you enter only the organizational costs of the mandated payments. For example, you do not enter the employee contribution for FICA, since that is not a cost to your organization. Maximums are understood to be the maximum employee earnings to which the percentage payment is applied.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override these and enter your own effective and end dates.

Changes: If a Legislated Payment changes during the base or settlement period, check this box, and select the timing of the change(s) from the combo box.

Maximum per: Many legislated payments apply to earnings up to a maximum. Choose here whether you will express such earning maximums per year or per month.

Percentage of: Choose from the combo box which pay types are included in the base to which the Legislated Payment percentage is applied.

Percentage of Pay Entry

The Percentage of Pay Legislated entry matrix contains three columns, Type, Employer contribution %, and Maximum. If you leave the maximum column blank, Bargaining Power assumes there is no maximum payment -- in other words, the percentage entered is applied to all earnings. Bargaining Power provides four standard types, FICA, FUTA, Medicare, and SUTA. You can enter an unlimited number of additional types. For each that you use, enter the percentage of earnings in the second column, and the maximum earnings to which the percentage is applied in the third column. For example, in 2009, for FICA, you would enter 6.2 as the employer contribution percentage and \$106,800 as the annual maximum. For Medicare you would enter 1.45 as the employer contribution percentage, and leave the maximum blank.

Type	Employer contribution %	Maximum
FICA	6.2	106800
FUTA	.8	7000
Medicare	1.45	
SUTA	4.4	

If you selected the ***Changes*** check box in the Percentage of Pay description dialog box, the timing of the changes you selected will appear in the combo box on the upper left hand corner of window. If the Change parameter is Annually or Seasonally the years or seasons appear in the combo box.

If the Change is By date, fill in the combo box with the appropriate dates. The first date that appears in drop-down combo box is the effective date. To add a new date, perform the following steps:

1. Click New.
The New Date dialog box opens.
2. Enter the new date in MM/DD/YY format.
3. Click OK.

You return to the Entry dialog box. The date you entered appears in the drop-down combo box in date order.

To change an existing date, perform the following steps:

1. Select the appropriate date from the drop-down comb box list.
2. Click Modify.
The Modify Date dialog box opens.
3. Enter the new date in MM/DD/YY format.
4. Click OK.

To delete a date, select the appropriate date from the drop-down comb box list and click Delete.

Complete a matrix for each of the changes, and then return to the combo box to select the next change factor. Do not save the Entry dialog box until you have completed matrices for all of the changes.

If the bargaining unit operates in several states which have different mandated payments, such as different SUTA contribution amounts, you must enter multiple Percentage of Pay provisions or proposals, differentiating among the groups of employees in **For**. You cannot choose more than one Percentage of Pay Legislated provision or proposal for the same group of employees at the same time in the same base or settlement.

11.3 Other Legislated Payment Provisions

In this section, you can enter “other” legislated payment provisions and proposals that are not based on a percentage of pay -- such as Worker’s Compensation, or any other mandated payment.

The Other Legislated Payment type allows you to define a provision or proposal that does not fit into any of the Legislated Payment types Bargaining Power provides. When you name and enter a type, it becomes available for selection in the Bargaining Power Legislated Payment menu. For information on how to create a user-defined pay provision or proposal, see Section 8.12.1, *Creating User-Defined Provisions and Proposals*.

Name: Enter a unique name for the provision or proposal, up to 50 characters.

For: Click the Ellipsis button (...) to select the Entire Bargaining unit or any subset.

Effective / End Dates: For provisions, these are the beginning and end dates of the base period(s) you have selected and defined in the Bargaining Unit screen. They are displayed for your information, and cannot be changed here. For proposals, the default dates are the beginning and end of the settlement duration, but you can override them and enter your own Effective and End dates.

Changes: If the provision or proposal changes during the base or settlement period, check **Changes** and select the timing of the increases from the combo box.

Varies by: Check this box if the legislated payment amounts vary by a characteristic in your employee database, then select the characteristic from the combo box.

Enter for: Select whether the provision or proposal amount you enter is for a Single employee, the Entire Group of employees, or a Flat amount for the selected group of employees that does not change with employee count changes.

Enter: Select whether the provision or proposal is entered as a \$ amount or a % of pay from the combo box.

If you select \$ amount, choose the time period for the \$ amount from the *per* combo box.

If you select % of pay, choose the pay components included in the base from which the percentage will be taken.

Percentage of. If there are maximum earnings to which the percentage of pay is applied, enter the legislated payment in Legislated: Percentage of Pay, rather than in Other, because Other does not allow entry of a maximum.

Apply to: If you choose Hour in *Amount per*, the Time Paid matrix is displayed. Check the hours included in the provision or proposal.

Other Legislated Payment Entry

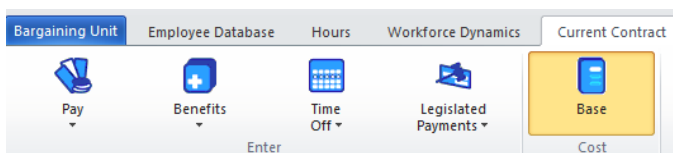
Enter the Legislated Payment amounts in the matrix created based on the information you provide in the description dialog box. If you select a ***Varies by*** characteristic, the rows comprise the values of the characteristic you choose, as displayed in the left-most, Eligibility, column. For alphanumeric characteristics, Bargaining Power enters the values; for numeric or date characteristics, you enter the values in the matrix. If you select ***Changes***, the timing of the changes comprises the matrix columns.

12 Designing and Running Reports

You can obtain costs and generate reports and keep track of your entries in the Current Contract and the Proposals tabs.

12.1 Base Costs: Overview

To design and run Base Cost reports go to the Current Contract tab and select Base.



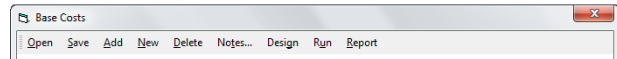
You can enter multiple Bases against which you want to cost proposals and settlements. These may vary by the scenarios you include for Time Paid or Workforce Dynamics; or they may vary by the level of detail in which you enter provisions, or the actual number of provisions you enter.

You can create a base for only some of the employees in the unit, or create one that does not include all the provisions you have entered.

If you omit differentials or incentives that you selected in Classifications employees receive, and you check Print Bargaining Power messages in Options, you will receive a message reminding you that named differentials or incentives are not included in the base.

If you create a base that does not include base pay for some employees, you will see an error message called No Base Pay that will name the groups for which no base pay has been entered.

The Base Costs Toolbar is shown below. For more information on any of the items on the toolbar, see the corresponding topic.



The sections in the Base Cost dialog box are described below.

Name: You may want to create multiple bases, with differing assumptions and forecasts of Time Paid, or workforce dynamics. For this reason, you name each base. Once named, the base is available for selection in Proposals and Settlements costing. When you select Open on the toolbar, all the names of bases you have created are displayed.

Current contract provisions and workforce dynamics: Here each category of the Current Contract Provisions section appears next to a plus sign. Scenarios you enter in Workforce Dynamics and Time Paid appear in the ***Time and Workforce*** section. The sections contain a list of all your named scenarios or provisions. To open a section you can either double-click on the name of the section or highlight the plus sign and press the Enter key. To open all of the sections at once click the Expand All button located at the bottom of the dialog box. All button located at the bottom of the dialog box. Select the provisions you want to cost and press the Select button or double-click the name to place it in the Provisions selected section. Or you can Select All. As you move provisions from the ***Current contract provisions and workforce dynamics section***, on the left hand side, to the ***Provisions selected*** section, on the right hand side, an asterisk appears next to each item you've selected.

This enables you to keep track of the items you have selected that will be included in the Base Cost report. Any item that does not have an asterisk next to it will not be included in the report.

Be sure to select scenarios for Total Number of Employees, Turnover and Replacements to enable Bargaining Power to run the dynamic workforce simulation. Also, if you are costing a pay provision, or any provision that is based on hours, be sure to select a Time Paid scenario.

Provisions in the base: Once selected, you can see provision and setup scenarios displayed in the right-hand section of the screen. Be sure to select scenarios for Total Number of Employees, Turnover and Replacements to enable Bargaining Power to run the dynamic workforce simulation.

Note that in a Base you cannot enter more than one provision of the same type for the same group of employees. This means you cannot cost more than one wage progression for the same group of employees, more than one shift differential, more than one % of pay legislated, etc. If you do the costing will be aborted and you will receive an error message.

12.1.1 Base Cost Report

For Base Costs Run is not activated until you have saved a base by using Add or Save on the Costing Toolbar.

When you click Run Bargaining Power begins the costing process. When it is complete the report will appear on your screen.

Each current contract provision selected will appear as a line item. Combined provisions appear with the name you assigned them.

Below the costs, any Notes you have attached to the report or to its component provisions are displayed followed by the Benchmark Statistics you requested.

With the exception of statistics related to employee pay, which are in dollars, Benchmark Statistics are displayed in the dollar multiple you select in Options.

You can use the standard Report Buttonbar located at the top of your report to:

- Print your report.
- View the report at different levels of magnification.
- Navigate through your report easily.
- Export your report.

For details, see Section 12.3, *Report Buttonbar*.

To scroll down the page of your report, use the scrollbar located on the right of the screen.

A sample Base Cost report.

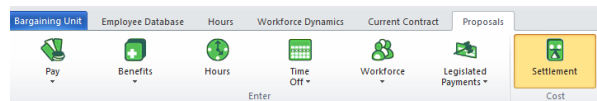
1.	Bargaining Power® Version 6.0	8/2/2012 12:32PM
2.	Current Terms and Conditions: Local 454	
3.	Single-Year Base	
4.	Annual Dollars in 1000's	
5.	Last Year	
	1. Base Pay	70,919
	2. Shift Differentials	3,001
	3. Health Plan Contributions	9,369
	4. Pension	9,546
	5. Sick Leave	1,350
	6. Vacation	5,652
	7. Personal Days	540
	8. 9 Holidays	2,434
	9. Jury Duty	22
	10. Bereavement Leave	29
	11. Legislated Payments	6,519
	Total	103,380
6.	Notes	
	Costing assumes no change in headcount and 8% attrition	
7.	Benchmark Statistics	
	1. Average pay rates	\$ 19.93
	2. Average cost per hour paid	\$ 20.58
	3. Average cost per productive hour	\$ 30.53
	4. Total number of hours paid	3,980,729
	5. Total number of productive hours	3,465,573
8.	Details For Time (Hours)	
	1. Total Hours	3,980,729
	2. Total Unpaid Time Off	0
	3. Total Paid Hours	3,980,729
	4. Jury Duty	1,120
	5. Bereavement Leave	1,500
	6. 9 Holidays	124,776
	7. Personal Days	27,760
	8. Vacation	290,600
	9. Sick Leave	69,400
	10. Total Paid Time Off	515,156
	11. Total Productive Hours	3,465,573
	12. Total Paid Straight Time	3,018,714
	13. Total Paid Overtime	361,871
	14. Total Paid Double Time	0
	15. Total Paid Premium Time	0
	16. Total Worked Holiday Time	144
	17. Total Hours Per Employee	2,294.4
	18. Productive Hours Per Employee	1,997.4
	19. ST Paid Hours Per Employee	2,085.7
	20. Average Number Of Employees	1,735

To follow is a description of the items that appear in your Base Cost report. The numbers to the left of the sample report correspond to the items below:

1. Date and time you last ran the report.
2. The name you gave the Base in the Base Cost dialog box and the Report Caption entered in the Options dialog box, if any. . For more information, see Section 12.4.4, *Options*.
3. The type of Base, Single-year, Multi-year or Single and Multi-year, as selected in the Options dialog box.

4. The unit of dollars as selected in the Options dialog box.
5. Annual cost of each provision contained in the base and the total cost.
6. Notes attached to the Base or any provisions, if any. For more information, see Section 4.1, *Notes*.
7. Benchmark Statistics, if any. For more information, see Section 12.4.1, *Benchmark Statistics*.
8. The Time Details report, if selected. For more information, see Section 12.4.5, *Time Details*.

12.2 Settlement Report: Overview



In the Proposals tab select Settlements to design and run reports. You can request reports that cost single proposals or collections of proposals that represent a total package or settlement. In Bargaining Power, all selected proposals interact, and they are cost taking the others in the Settlement into account. Settlement costs display the true cost of a package, or set of proposals, because the bottom-line costs include consideration of the interaction among all the proposals.

Note that Bargaining Power costs proposals in the order in which they appear in the report. So, for example, if you are costing three pay proposals and four time off proposals you will know which proposals include the effects of other proposals by their order. The time proposals take into account all the pay proposals, and each succeeding time proposal takes into account the ones before it

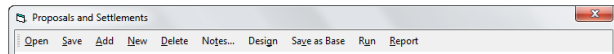
You can use Proposal and Settlement costs to:

- Trace movement at the table.

- Test the sensitivity of one proposal to another.
- See how a proposal's costs may change depending on the other proposals included in a settlement.

It is expected that you will build a library of settlements that reflect your thinking both during the preparation for bargaining, and during negotiations. For this reason you name each settlement so you may call it up later either to view its costs or to modify it to make a similar settlement -- adding or changing proposals at will. You can create any number of settlements for a single bargaining unit.

The Proposals and Settlements Toolbar is shown below. For more information on any of the items on the toolbar, see the corresponding topic.



The sections in the Proposal and Settlements dialog box are described below.

To change the base against which you want a proposal or settlement cost by, click the Ellipsis button (...) next to the **Base name** field, and select a named base. You specify whether you want the settlement cost against a single- or multi-year base by selecting Options and making a choice in the **Base cost method** combo box.

If you do not make a proposal to end a current contract provision contained in the Base associated with the Proposal or Settlement you cost, Bargaining Power assumes that the current contract provision continues throughout the settlement period. To indicate that a current contract provision does not continue into the settlement period, you can create a proposal that changes the current provision's values to zero, and include that proposal in the settlement.

Name: Name the Proposal or Settlement or open one you have already entered if you would like to view it, re-cost it, or modify it to create a new one.

Base Name: Click the Ellipsis button (...) to invoke a display of all the Bases you have created for the bargaining unit. Choose the one that you would like the Proposal or Settlement to be cost against.

The left hand section of the screen displays ***Proposals***. Here, each category of the Proposals section appears next to a plus sign. The sections contain a list of all the Names of Proposals you have entered. To open a section you can either double-click or highlight the plus sign and press the Enter key. Or you can Select All. To open all of the sections at once click the Expand All button located at the bottom of the dialog box. As you select proposals, their names appear in the right hand section of the screen, ***Proposals selected***. To remove a selection, highlight its name in the right hand section and choose Remove.

As you move proposals from the ***Proposals entered*** section, on the left hand side, to the ***Proposals selected*** section, on the right hand side, an asterisk appears next to each item you've selected. This enables you to keep track of the items you have selected that will be included in the Settlement report. Any item that does not have an asterisk next to it will not be included in the report.

Note that you cannot enter more than one proposal of the same type for the same group of employees in the same time period in a single settlement. This means you cannot cost more than one wage progression for the same group of employees, more than one shift differential, more than one % of pay legislated, etc. You can enter two proposals of the same type for the same group of employees if the effective and end dates do not overlap.

12.2.1 Proposals and Settlement Report

For Proposals and Settlements, Run is not activated until you have saved a settlement by using Add or Save on the Costing Toolbar.

When you select Run Bargaining Power begins the costing process. When it is complete the report will appear on your screen.

Each proposal selected will appear as a line item. Combined proposals appear with the name you assigned them.

The costs displayed in the report are marginal, by default. That is, they represent the costs or savings when compared to the costs of the associated provision, if there are any, in the base you select. You can display total costs for provisions and proposals. For more information, see Section 12.4.4, *Options*. Marginal costs are either:

- Over the base year -- if you choose the *single-year base* option; or
- Over the cost of continuing the provision in the corresponding year of the settlement period -- if you choose the *multi-year option*.

The Proposal and Settlement report displays all of the marginal costs of the provisions that are created due to changes incurred by proposals. These are the indirect effects of proposals on the continuing costs of current contract provisions that are not otherwise changed in the settlement. These costs appear in your report as an additional numbered item entitled Associated Marginal Cost by default. However, you can override the default title and provide your own title using the Combine Proposals dialog box. For more information, see Section 12.2.2, *Associated Marginal Costs*.

If you have included proposals to change time-off provisions and you are costing the change in productive time, Bargaining Power will include the value of the changes in productive time in your Settlement reports as a line item entitled Imputed Economic Costs. However, you can override the default title and provide your own title using the Combine Proposals dialog box. For more information, see Section 12.2.3, *Imputed Economic Costs*.

Below the costs, any Notes you have attached to the report or to its component provisions or proposals are displayed followed by the Benchmark Statistics you requested.

With the exception of statistics related to employee pay, which are in dollars, Benchmark Statistics are displayed in the dollar multiple you select in Options.

You can use the standard Report Buttonbar located at the top of your report to:

- Print your report.
- View the report at different levels of magnification.
- Navigate through your report easily.
- Export your report.

For details, see Section 12.3, *Report Buttonbar*.

To scroll down the page of your report, use the scrollbar located on the right of the screen.

A sample Proposal and Settlement report.

1.

2.

3.

4.

5.

6.

7.

8.

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Bargaining Power® Version 6.0		8/2/2012 12:21PM		
Offer 2/7 at 7:00 PM				
Response to Union Offer 1/31				
Single-Year Base		Current Terms and Conditions		
	Year 1	Year 2	Year 3	Total
Annual Dollars in 1000's				
1. General Pay Increase: 4% 3% 3%	2,924	5,989	9,164	18,078
2. Shift Differential Increase by \$0.10	162	162	162	486
3. Signing Bonus in Year 1: \$500	500	0	0	500
4. Health Plan: Increase by 5%	479	979	1,499	2,956
5. Pension: Reduction for New Hires	(62)	(158)	(231)	(451)
6. Vacation: Increase by 2 days	708	905	1,121	2,732
7. Associated Marginal Cost	180	895	1,618	2,693
Imputed Economic Cost				
8. Vacation: Increase by 2 days	708	905	1,121	2,732
Cost Of Proposals	5,963	9,677	14,453	30,093
Cost Summary				
1. Current Contract Cost	105,709	105,709	105,709	317,126
2. Plus: Incremental Base Cost	690	1,682	1,177	2,949
3. Economic Cost Of Proposals	5,963	9,677	14,453	30,093
4. Total Economic Settlement Cost	112,361	116,468	121,338	350,166
5. Plus: Imputed Economic Cost	(708)	(905)	(1,121)	(2,732)
6. Total Financial Settlement Cost	111,653	115,563	120,218	347,436
Notes	Costing assumes no change in headcount and 6% attrition			
Benchmark Statistics				
1. % change in labor costs over base	5.6%	9.3%	13.7%	226.7%
2. Annual % change in labor costs	5.6%	9.3%	4.0%	
3. Average pay rates	\$ 20.23	\$ 21.12	\$ 21.99	\$ 21.11
4. Average cost per hour paid	\$ 26.80	\$ 27.74	\$ 28.86	\$ 27.80
5. Average cost per productive hour	\$ 29.48	\$ 30.52	\$ 31.78	\$ 30.59
Details For Time (Hours)				
1. Total Hours	4,165,960	4,165,960	4,165,960	12,497,880
2. Total Unpaid Time Off	0	0	0	0
3. Total Paid Hours	4,165,960	4,165,960	4,165,960	12,497,880
4. Jury Duty	1,120	1,120	1,120	3,360
5. Bereavement Leave	1,500	1,500	1,500	4,500
6. Holidays	38,280	38,280	38,280	114,840
7. Personal Days	27,760	27,760	27,760	83,280
8. Vacation: Increase by 2 days	240,545	241,262	245,533	727,340
9. Sick Leave	69,400	69,400	69,400	208,200
10. Total Paid Time Off	378,605	379,323	383,593	1,141,520
11. Total Productive Hours	3,787,355	3,786,637	3,782,367	11,356,359
12. Total Paid Straight Time	3,618,716	3,618,714	3,618,714	10,856,143
13. Total Paid Overtime	373,311	373,311	373,311	1,119,934
14. Total Paid Double Time	46,864	46,864	46,864	139,992
15. Total Paid Premium Time	0	0	0	0
16. Total Worked Holiday Time	127,270	127,270	127,270	381,810

To follow is a description of the items that appear in your Proposal and Settlement report. The numbers to the left of the sample report correspond to the items below:

1. Date and time you last ran the report.
2. The name you gave the Settlement in the Proposals and Settlement dialog box and the Report Caption entered in the Options dialog box, if any.

3. The type of Base, Multi-year or Single-year, as selected in the Options dialog box and the name of the Base against which the Settlement is cost.
4. The unit of dollars as selected in the Options dialog box.
5. The annual costs or savings of each selected proposal.
6. Associated Marginal Costs, if any. For details see Section 12.2.2, *Associated Marginal Costs*.
7. Imputed Economic Costs, if any. For details, see Section 12.2.3, *Imputed Economic Costs*.
8. Total proposal costs or savings for each year of the Settlement and the total including Imputed Economic costs, if any.
9. Cost Summary. For details see Section 12.2.4, *Cost Summary*.
10. Notes attached to the Settlement and any provisions, if any. For more information, see Section 4.1, *Notes*.
11. Benchmark Statistics, if any. For more information, see Section 12.4.1, *Benchmark Statistics*.
12. The Time Details report, if selected. For more information, see Section 12.4.5, *Time Details*.

12.2.2 Associated Marginal Costs

Bargaining Power displays the costs or savings of each proposal you select in a settlement. However, the full cost of a settlement also includes associated marginal costs which you may refer to as Roll-up or Spin-off costs. These include the indirect effects of proposals on the continuing costs of current contract provisions.

For example, if in your base you have a pension provision that is a percentage of base pay, and you make a proposal to increase base pay, the proposal's effect on the pension is an associated marginal cost.

If a current contract provision contained in the base you select is affected by a proposal, the provision name is listed along with the indirect cost related to it. By default, the associated marginal costs appear individually in your report under a numbered proposal entitled "Associated Marginal Costs".

You can combine them into a single line item and rename it Roll-up, Spin-off or any term you prefer. For detailed instructions, see Section 12.4.3.1, *Combining Associated Marginal Costs*.

12.2.3 Imputed Economic Costs

In time-off proposals, Bargaining Power costs the change in productive hours by default. You can override the default by checking the ***Do not cost change in productive time*** check box located in every Time Off proposal description screen.

If you cost the change in productive time, Bargaining Power values any change in productive hours at the cost of labor and will include such costs in your Settlement reports as a line item entitled “Imputed Economic Costs.”

Imputed Economic Costs represent the value of the productive time that is lost or gained through time-off proposals.

The costs that appear in the body of the report for the proposal represent a redistribution of costs from Pay and Benefit provisions or proposals. For example, if a time-off proposal increases time off, the proposal’s line item cost in the body of the report will be offset by a decrease in appropriate Pay and Benefit line items displayed in Associated Marginal Costs.

The costs that appear in the Imputed Economic Costs line item are not financial costs but, instead, show the economic value of the time gained or lost.

In the Cost Summary, these costs are included in the Economic Total Cost of the Proposals to create the Total Economic Settlement Cost but are either added or subtracted to create the Total Financial Settlement cost. For more information, see Section 12.2.4, *Cost Summary*.

You can combine the Imputed Economic Costs into a single line item and rename it any term you prefer. For detailed instructions, see Section 12.4.3, *Combining Imputed Economic Costs*

12.2.4 Cost Summary

In your Settlement reports Bargaining Power displays a Cost Summary. A Cost Summary displays the following information:

Current Contract Cost: This is the total cost of the base you have chosen to cost the Settlement against.

Plus: Incremental Base Cost: Incremental base costs only appear in Settlements that are cost against a single-year base. They are the changes in your base costs that are not a result of the proposals but, rather, a result of the changes you entered in Workforce Dynamics. They show the increase in each settlement year over the last year of the current contract due to such Workforce Dynamics as employees moving up a pay progression, etc.

If you want to see which of the individual current contract provisions are increasing you can run the base as a multi-year base in Base Costs.

Plus: Cost of Proposals: This is the total cost of the proposals contained in the Settlement including the Imputed Economic Cost. This number matches the Total Cost of Proposals line that appears above the Cost Summary.









Total Economic Settlement Cost: This is the sum of the Current Contract Cost, the Incremental Base Cost, if any, and the Economic Cost of Proposals.

Plus: Imputed Economic Costs: Imputed Economic Cost only appears if you have entered proposals to change time off. They represent the value of the productive time that is lost or gained through proposals to change a time off provision. See Section 12.2.3, *Imputed Economic Costs* for details.

Total Financial Settlement Costs: This is the total cost of your Settlement. This number includes the cost of your base, plus the cost of your proposals, plus or minus your Imputed Economic Costs, if any.

12.3 Report Buttonbar

You can use the Report Buttonbar that appears at the top of your reports to perform the following functions.

	Close out of your report.
	Move to the first page of the report.
	Move to the previous page of the report.
	Move to the next page of the report.
	Move to the last page of the report.
	Print your report.
	Export your report to Microsoft Word, Adobe Acrobat, or Excel. See Section <i>Exporting Your Report</i> for details.
	View the report at different levels of magnification. Choose a magnification percentage from the drop-down list box.

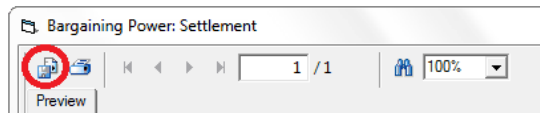
12.3.1 Exporting Your Report

After you have created and cost a report, you can export it so that it can be saved as a text file, an HTML file or read by any of the following applications:

- Microsoft Excel®
- Microsoft Word®
- Adobe Acrobat®

If you want to export a report to Microsoft Word®, Microsoft Excel, or as an Adobe Acrobat® file, perform the following steps:

1. From the report screen tool bar, as shown below, click the Export button:



2. The Export dialog box opens. Under Format choose the format you wish to save your report as from the list box and click the OK button.
3. The chosen application's Export Format Options screen appears. Make the appropriate selections and click OK.
4. The Select Export File dialog box opens. Type a report name, choose the drive and directory where you would like to save the report and click OK.

Note: When saving the report you have to delete or type over the default file name that appears in the screen.

12.4 Designing Your Report

In addition to displaying the cost and savings of your proposals you can include additional information on your reports, such as benchmark statistics. You can also change how the information is displayed in order to suit your audience. The Design menu includes:

- Benchmark Statistics
- Customize Report
- Options
- Time Details

12.4.1 Benchmark Statistics

Benchmark statistics provide information related to the costs you request that enable you to take different views of your labor costs, and the changes in your labor costs that you request in Proposal and Settlement costing.

Benchmark Statistics

Save Cancel

<input type="checkbox"/> Average pay rates	<input type="checkbox"/> Pay scatter
<input type="checkbox"/> Average cost per hour paid	<input type="checkbox"/> Total number of hours paid
<input type="checkbox"/> Average cost per productive hour	<input type="checkbox"/> Total number of productive hours
<input type="checkbox"/> % change in labor costs over base (annual \$'s only)	<input type="checkbox"/> Productive time as a % of total time paid
<input type="checkbox"/> % change in selected costs over all base costs	<input type="checkbox"/> Premium time as a % of total time paid
<input type="checkbox"/> % change in selected costs over base costs	<input type="checkbox"/> Benefit costs as a % of total labor costs
<input type="checkbox"/> Annual % change in labor costs	<input type="checkbox"/> Labor costs as a % of another cost
<input type="checkbox"/> % change in average pay rates over base	<input type="checkbox"/> Labor costs per unit
<input type="checkbox"/> Annual % change in average pay rates	<input type="checkbox"/> Net present value

Average pay rates: This statistic displays the average hourly base pay throughout the year for the entire bargaining unit. The base pay consists of either a pay progression or pay rate, combined with any applicable probation period increase or general pay increase. It does not include differentials, incentives, COLA's (unless the COLA is rolled into the base) or any other pay types. It is a nominal pay rate, without regard for the effect of overtime, double time, or other premium time multipliers on earnings. There is no weighting of full- or part-time status. The base pay rate for all employees counts equally in the calculation of the average.

Average cost per hour paid: This statistic divides the total labor costs by the total number of hours paid. Each hour is counted equally, whether it is for overtime double time or other premium time and whether it is for time worked or time off. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Average cost per productive hour: This statistic divides the total labor costs by the total number of hours paid LESS time off, whether time off at work or time off away from work. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

% change in labor costs over base (annual \$'s): The percentage that will be displayed is the increase or decrease in labor costs over the single-year or multi-year base. This option is available only available in Proposals and Settlements only, and it reflects the percentage change in annual dollars (even if your report is in costs per hour worked or paid or per employee).

% change in selected costs over all base costs: The percentage displayed is the increase or decrease in certain components of the settlement over the total labor costs in the single- or multi-year base. When you select this statistic, click the Ellipsis button (...) to enter a name to assign to this statistic. You may select all components of the four proposal sections (i.e., Pay, Benefits, Time, Legislated) or choose any proposal types (for example, Shift Differential, Meals, Health: Total Plan) you would like to compare to the total labor costs of the settlement you are costing. You can, for example choose to include in the statistic bonus proposals but not differential proposals -- both of which are in the Pay section. However, you cannot choose only some of the proposals of a single type. For example, if you have entered a bonus proposal for two different subsets, and both proposals are in the settlement you are costing, you cannot choose to have only one of them included in this statistic.

% change in selected costs over base costs: The percentage displayed is the increase or decrease in certain components of the settlement over their costs in the single- or multi-year base. When you select this statistic, click the Ellipsis button (...) to enter the name you would like to assign to this statistic. You may select the proposal types (for example, Shift Differential, Meals, Health: Total Plan) you would like to compare to their base costs. You can, for example choose to include in the statistic bonus proposals but not differential proposals -- both of which are in the Pay section. However, you cannot choose only some of the proposals of a single type. For example, if you have entered a bonus proposal for two different subsets, and both proposals are in the settlement you are costing, you cannot choose to have only one of them included in this statistic.

Annual % change in labor costs: The percentage displayed is the increase or decrease in labor costs over the previous year of the settlement. If you have chosen a single-year base, the first year percentage cost will be over the base year. If you have chosen a multi-year base, the first year cost will not appear. This option is available in Proposals and Settlements only, and it reflects the percentage change in annual dollars (even if your reports are in costs per hour worked or paid or per employee).

% change in average pay rates over base: This statistic shows the percentage change in average pay rates for each year of the settlement period either over the base year --if you are using a single-year base -- or over the corresponding settlement year in a multi-year base. For additional information, see **Average pay rates** in Section 12.4.1, *Benchmark Statistics*.

Annual % change in average pay rates: The percentage displayed is the increase or decrease in average pay rates over the previous year of the settlement. If you have chosen a single-year base, the first year percentage cost will be over the base year. If you have chosen a multi-year base, the first year cost will not appear. For additional information, see **Average pay rates** in Section 12.4.1, *Benchmark Statistics*.

Pay scatter: A pay scatter lists the unique pay for a selected group of employees as of a selected date, and shows the number of employees that earn each rate. When you select this statistic, click the Ellipsis button (...) to describe your request. In the window that appears you can select a population for which you want to see a pay scatter -- the entire bargaining unit or any subset. You can change the default effective date to any date you choose by editing the date field, and you can choose the time period for which you want the pay calculated -- hour, day, week, month or year. Choose which elements of pay you want included from the ***Pay rates per*** combo box. The scatter will then display on the report each unique pay amount, as you have defined pay and the number of employees who earn each amount on the date you select, as well as the total number of employees in the group you selected on the date you selected. Range allows you to change the number of rates that will be displayed in the pay scatter. The default is zero, which means the pay scatter will show each unique value. By setting the range above zero, the pay scatter will group employees based on the increment specified and display the number of employees that fall within that range.

Total number of hours paid: This statistic displays the total annual number of hours paid for the bargaining unit, whether for time worked, or time off. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Total number of productive hours: This statistic displays the total annual number of hours paid for the bargaining unit, LESS time off, whether time off at work or time off away from work. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Productive time as a % of total time paid: This statistic displays the total number of productive hours as a percentage of the total number of hours paid. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Premium time as a % of total time paid: This statistic displays the total number of overtime, double time and other premium time hours by the total number of hours paid. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Benefit costs as a % of total labor costs: When you select this statistic, click the Ellipsis button (...) to choose which benefit costs you would like to include in the calculation. The statistic displayed is the sum of the annual costs of all selected benefits as a percentage of total labor costs. It is calculated for each year of the base period in Base Costs and for each settlement year in Proposals and Settlements.

Labor costs as a % of another cost: This statistic allows you to view your annual labor costs as a percentage of another cost of interest to you. For example, sales, revenues, or profits. When you select this statistic, click the Ellipsis button (...) to enter the name of the cost to which you want to compare labor costs, and enter that cost for each year of the base period in Base Costs and for each year of the settlement period in Proposals and Settlements. The percentage displays total labor costs as a percentage of the annual costs you enter.

Labor costs per unit: This statistic allows you to view your annual labor costs per unit. For example, per unit of production. When you select this statistic, click the Ellipsis button (...) to enter the name of the unit to which you want the labor cost of, and enter that cost for each year of the base period in Base Cost, and for each year of the settlement period in Proposals and Settlements. The answer displays total labor costs per unit that you enter.

Net present value: You can obtain the net present value of a multi-year base or settlement. When you select this statistic, click the Ellipsis button (...) to enter the percentage discount rate. In a settlement report, you can choose whether you want to display the net present value of the Cost of Proposals cash flow, the Total Settlement Cost or both.

12.4.2 Customize Report – Base Costs

When you invoke this window, you are able to combine current provisions so their costs will be summed to comprise a single line item in a report. You can also create a group of provisions that will be subtotaled while also displaying each component provision's cost. In the report, these subtotaled groups of provisions will appear at the end.

Customize Report

Open Save New Delete

Name of the combined provision: Pension

☐ Display components and subtotal

Provisions selected:

- Pay *
- Benefits *
- Legislated Payments *

Provisions that are combined:

- Pension 5%*
- Pension for New Hires 5%*

Expand All Select >> Remove <<

Premium Time Costing

☐ Cost premium time separately

☐ Combine Name:

To combine provisions, perform the following steps:

1. Enter a name in the ***Name of the combined provision*** entry field. This name will appear in the report with the total amount of the provisions you have selected to combine.
2. The ***Provisions selected*** section, on the left-hand screen, contains the provisions in the current Base. In the ***Provisions selected*** section open the sections and select the provisions that you would like to combine. You can select them either by double-clicking on the provision or selecting the provision and clicking the Select button. The provisions move over to the

Provisions that are combined section on the right-hand side.

3. To have each component provision's cost displayed along with a subtotal, check the "Display components and subtotal" box.
4. Click Save.

In the Proposals and Settlements report option "Print Total Costs for Provisions and Proposals," you may want to combine provisions and proposals. If you do, you must create a Combined Provision name in the associated Base that is identical to a Combined Proposal name in the settlement. You must create these identical names even if there is only one provision and one proposal that you want to combine. (See **Print Total Costs for Provisions and Proposals** in Section 12.4.4, *Options*.)

Premium Time Costing: If you would like to see premium time (overtime, double time, premium time) displayed on a separate line item in your report, check Cost premium time separately. A line item will appear in the report with the same name as the provision/proposal to which the overtime is associated with a [1] symbol. There will be a note stating that these costs or savings are Associated Premium Time costs.

If you would like to combine all premium costs, check Combine. The report will then display a single line item that sums all premium time costs. If you would like to name these combined costs something other than "Associated Premium Time cost" you may enter a name of your choice in the field next to the Combine check box.

12.4.3 Customize Report – Proposals and Settlements

When you invoke this window, you are able to combine current proposals so their costs will be summed to comprise a single line item in a report. You can combine any number of proposals. You can also create a group of proposals that will be subtotaled while also displaying each component proposal's cost. In the report, these subtotaled groups of proposals will appear at the end.

Customize Report

Open Save New Delete

Name of the combined proposal: Pay Proposals

☐ Display components and subtotal

Proposals selected:

- = Pay
 - General Pay Increase *
 - General Pay Increase: 4% 3% 3%*
 - = Differentials *
 - = Shift*
 - Shift Differential: Increase by \$0.10*
 - = Bonus *
 - Signing Bonus: \$500*
- = Benefits *
- = Health: Total Plan *
- Health Plan: Increase by 5%*
- = Pension *
- Pension: Reduction for New Hires*
- = Time and Workforce *

Proposals that are combined:

- General Pay Increase: 4% 3% 3%*
- Shift Differential: Increase by \$0.10*

Expand All Select >> Remove <<

Premium Time Costing

☐ Cost premium time separately

☐ Combine Name:

Associated Marginal Cost

☒ Combine Name: Roll up

Imputed Economic Cost

☐ Combine Name:

To combine proposals, perform the following steps:

1. Enter a name in the ***Name of the combined proposal*** entry field. This name will appear in the report with the total amount of the proposals you have selected to combine.
2. The ***Proposals selected*** section, on the left-hand screen, contains the proposals in the current Settlement. In the ***Proposals selected***

section open the section and select the proposals that you would like to combine. You can select them either by double-clicking on the proposal or selecting the proposal and clicking the Select button. The proposals move over to the ***Proposals that are combined*** section on the right-hand side.

3. Click Save.

In the report option “Print Total Costs for Provisions and Proposals,” you may want to combine provisions and proposals. If you do, you must create a Combined Provision name in the associated Base that is identical to a Combined Proposal name in the settlement. You must create these identical names even if there is only one provision and one proposal that you want to combine. (See **Print Total Costs for Provisions and Proposals** in Section 12.4.4, *Options*.)

Premium Time Costing: If you would like to see premium time (overtime, double time, premium time) displayed on a separate line item in your report, check Cost premium time separately. A line item will appear in the report with the same name as the provision/proposal to which the overtime is associated with a [1] symbol. There will be a note stating that these costs or savings are Associated Premium Time costs.

If you would like to combine all premium costs, check Combine. The report will then display a single line item that sums all premium time costs. If you would like to name these combined costs something other than “Associated Premium Time cost” you may enter a name of your choice in the field next to the Combine check box.

12.4.3.1 Combining Associated Marginal Costs

If a current contract provision contained in the base you select is affected by a proposal, the provision name is listed along with the indirect cost related to it. By default, the associated marginal costs appear in your report as numbered items below the title “Associated Marginal Costs” with each affected provision’s name.

To combine them, check the Combine check box that appears in the Associated Marginal costs section. You also have the option to change the default title that will appear in your report by entering it in the Name entry field. For more information, see Section 12.2.2, *Associated Marginal Costs*.

12.4.3.2 Combining Imputed Economic Costs

If the Settlement contains a proposal to change time off with the default request to cost the change in productive hours, Imputed Economic Costs appear in your report as numbered items below the title “Imputed Economic Costs” with each time-off proposal’s name. You can combine the Imputed Economic Costs into a single line item and rename it any term you prefer.

To combine them, check the Combine check box that appears in the Imputed Economic Cost section. You also have the option to change the default title that will appear in your report by entering it in the Name entry field. For more information, see Section 12.2.3, *Imputed Economic Costs*.

12.4.4 Options

The Options window allows you to enter the following information:

Report Caption: Enter a title for the report. The caption will appear as a second title line, below the Base or Settlement name.

Base cost method: If you select both the Single-year and Multi-year base options in the Bargaining Unit dialog box, you can choose one to use the costing you are now requesting. In Base Costs, you can also choose “Single and multi-year base” to display the annual costs of both base options. This enables you to see at once the calculated costs of the final year of the current contract, as well as how those costs will change in each of the settlement years, either as a result of changes you have entered in provisions or in hours or workforce scenarios.

Show cost/savings: Select how you would like Bargaining Power to display your cost or savings. Your options include annual dollars, per hour paid, per hour worked, cents per hour paid, cents per hour worked, and dollars per employee. If you choose dollars per hour worked, dollars per hours paid, cents per hour paid or cents per hour worked you can change the number of decimal places. The default is 2.

Unit of dollars: If you choose to Show cost/savings in annual dollars, you can enter the unit of dollars that you would like to have costs displayed. Your options are ones (1), tens (10), hundreds (100), thousands (1000), ten-thousands (10000), hundred-thousands (100,000) or millions (1000000).

Display currency: You can choose to display the cost/savings on the report with in any of the available currency symbols.

Print Total Costs For Proposals: If you check this box, Bargaining Power will display the total cost of each proposal included in the Settlement you are costing. If you have entered a proposal that changes a current contract provision, the total cost of the proposal is the sum of the marginal cost of the proposal that appears as the line item on the Settlement report and the current contract provision cost. This will appear as a separate section of your settlement report entitled “Proposal Total Costs”. This option is only available in Proposals and Settlements.

Print Total Costs For Provisions and Proposals: If you check this box, Bargaining Power will display each of the provisions in the selected Base against which you are costing the settlement as well as each of the proposals in the settlement. If you have entered a proposal that changes a current contract provision, the total cost of the proposal is the sum of the marginal cost of the proposal that appears as the line item on the Settlement report and the current contract provision cost. If you want to combine the costs of provisions and proposals that are not of the same type, you must create a Combined Provision name in the associated Base that is identical to a Combined Proposal name in the settlement. You must create these identical names even if there is only one provision and one proposal that you want to combine.

Show Incremental Costs: If you check this box, Bargaining Power will display the annual change in cost over the prior year instead of over the base year. In Base Costs, Incremental Costs are not available if you select the single-year base option.

Print Time Details Report: If you check this box, Bargaining Power will display the Time Details report (see Section 12.4.5, *Time Details*).

Print Bargaining Power messages: If you check this box, Bargaining Power will display any errors, or warnings or messages about the set of provisions or proposals or base or settlement it costs.

12.4.5 Time Details

The screenshot shows a software window titled "Options" with a close button in the top right corner. Inside the window, there is a "Save" button and a "Cancel" button. The "Report caption:" field contains the text "Response to Union Offer 1/31". Below this, the "Base cost method:" is set to "Single-year base" and "Show cost/savings:" is set to "in annual dollars". There are five checkboxes: "Print Total Costs For Proposals" (unchecked), "Print Total Costs For Provisions and Proposals" (unchecked), "Show Incremental Costs" (unchecked), "Print Time Details Report" (checked), and "Print Bargaining Power Messages" (unchecked). To the right of the checkboxes, the "Unit of dollars:" is set to "1000" and the "Display currency:" is set to "\$".

Time Details displays information in the Base Cost and Proposal and Settlement reports related to the hours you entered in the Time Paid and Time Off sections. For information on how to hide or display Time Details, see Section 12.4.4, *Options*.

Total Hours: The total annual hours paid for the bargaining unit, including straight time, overtime and double time. Bargaining Power derives this number from the hours entered in the Time Paid dialog box.

Total Unpaid Time Off: The total annual number of unproductive hours that are not paid for the bargaining unit. The total number of hours entered for each individual unpaid provision or proposal is listed above.

Total Paid Hours: The total annual number of hours paid for the bargaining unit, whether for time worked, or time off. This number is calculated for each year of the base period in Base Costs, and for each settlement year in Proposals and Settlements.

Total Paid Time Off: The total annual number of unproductive hours that are paid for the bargaining unit. The total number of hours entered for each individual paid provision or proposal is listed above.

Total Productive Hours: The total annual number of hours paid for the bargaining unit, LESS time off, whether time off at work or time off away from work.

Total Paid Straight Time: The total annual number of straight time hours for the bargaining unit, whether worked or not.

Total Paid Overtime: The total annual number of overtime hours for the bargaining unit, whether worked or not.

Total Paid Double Time: The total annual number of double time hours for the bargaining unit, whether worked or not.

Total Paid Premium Time: The total annual number of premium time hours for the bargaining unit, whether worked or not.

Total Hours Per Employee: The total annual number of hours for the bargaining unit, including time worked and time off, divided by the average number of employees.

Productive Hours Per Employee: The total annual number of productive hours for the bargaining unit divided by the average number of employees.

Straight Time Paid Hours Per Employee: The average annual number of straight-time hours paid for per employee.

Average Number of Employees: The average annual number of employees in the bargaining unit. This number takes into account the effects of all workforce dynamic scenarios.

Change In Total Hours: The difference between the total annual hours paid for the bargaining unit in the Base Cost report and the total annual hours paid for in the Proposals and Settlement report. This includes straight time, overtime and double time. This item only appears in the Proposals and Settlement reports.

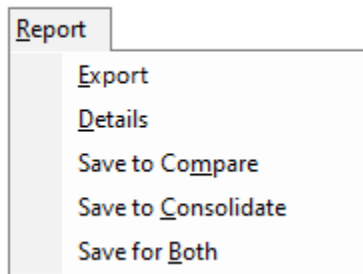
Employees To Maintain Total Hours: The number of employees needed to maintain the total number of annual hours paid for the bargaining unit. This number is derived by dividing the Total Hours Per Employee by the Change in Total Hours. This item only appears in the Proposals and Settlement reports.

Change In Productive Hours: The difference between the total annual productive hours for the bargaining unit in the Base Cost report and the total annual productive hours in the Proposals and Settlement report. This item only appears in the Proposals and Settlement reports.

Employees to Maintain Productive Hours: The number of employees needed to maintain the total annual number of productive hours. This number is derived by dividing the Total Productive Hours Per Employee by the Change in Productive Hours. This item only appears in the Proposals and Settlement reports.

12.5 Additional Report Features

After you've run your base cost or settlement report you can perform any of the following functions:



- **Export:** Enables you to export your report to Microsoft Excel, Microsoft Word, or Adobe Acrobat
- **Details:** List all the information entered in each of the description dialog boxes. See Section 12.5.2 for details.
- **Save to Compare:** Saves the report in order to compare the bottom-line results of multiple base cost reports or potential settlements or offers on a single report See 12.5.3, *Compare Reports*, for details.

- **Save to Consolidate:** Saves the report in order to sum the results of a set of Base Costs or a set of Proposals and Settlements across multiple bargaining units. See Section 12.5.4, *Consolidate Reports*, for details.
- **Save for Both:** Saves the report for Compare and Consolidate.

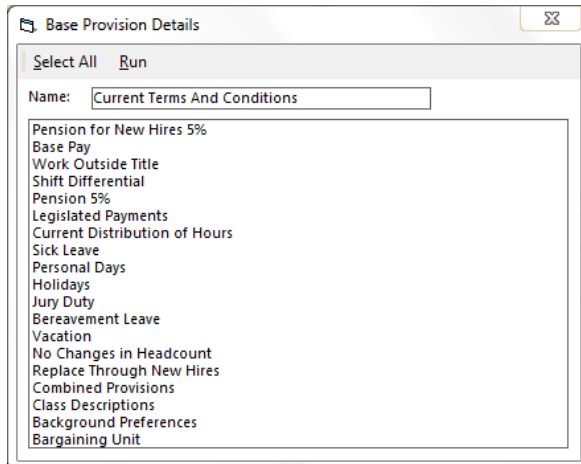
12.5.1 Details

Details enables you to create a report that lists all of the information that you entered in the description dialog box and entry dialog box for provisions, proposals or scenarios that are included in the active Base Cost or Proposals and Settlements report.

To generate a Details report, perform the following steps:

1. From either of the Report toolbars, click Details.

The Details dialog box opens.



2. If you would like your report to show the details for:
 - Every item, click Select All.
 - Selected items, click the individual items in the list box.
3. Click Run.

For details on exporting your report, see Section 12.3.1, *Exporting Your Report*.

The Details Report is generated and appears on your screen. You can use the standard Report Buttonbar located at the top of your report to:

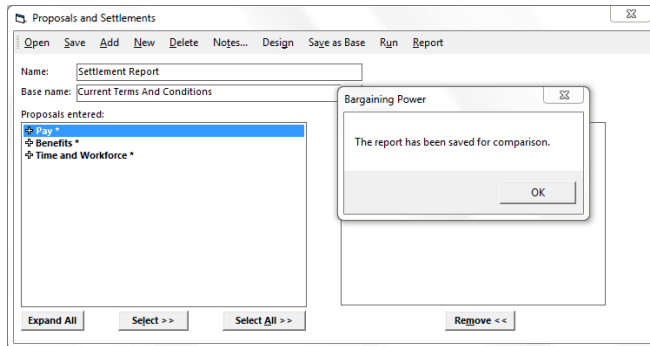
- Print your report.
- View the report at different levels of magnification.
- Navigate through your report easily.
- Export your report.

For details, see Section 12.3, *Report Buttonbar*.

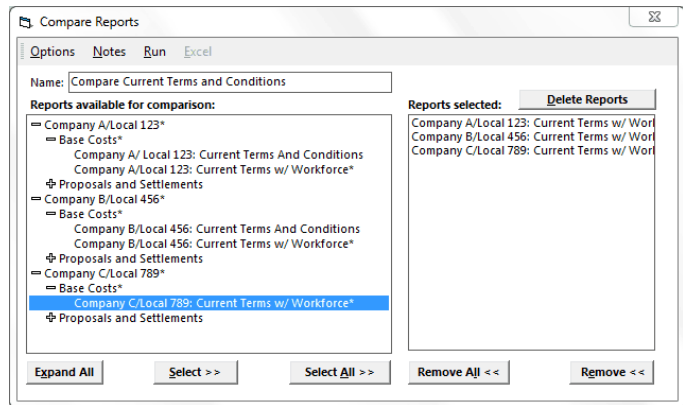
12.5.2 Compare Reports

You can compare the bottom-line results of multiple base cost, proposal or settlement on a single page. You can summarize reports related to a single bargaining unit, or to any and all units you have analyzed in the software. You can view at once a series of potential settlements for a single unit, or you can view all settlements you have made with a variety of unions, or you can view base cost projections for all your bargaining units at once.

In order to make a base cost or settlement report available for comparison, you must first run either the Base Cost or Settlement report and then select Save to Compare or Save for Both from Report on the toolbar. (Save for Both saves the report for Comparison and Consolidation. See Section xxx for more information on Save for Consolidation.) When you select Save to Compare, the message “The report has been saved for comparison” will appear.



All reports saved for Comparison appear in the Compare Reports window (see below), which you open by selecting Compare Reports from the Bargaining Unit tab.



To build a Comparison report, select report names from the section entitled ***Reports available for comparison*** and move them to the right, under ***Reports selected***. Enter a report name and select Run. You can compare both base cost and settlement reports. All reports chosen will appear on the same report as shown below:

Bargaining Power! Version 6.0

8/16/2012 12:13PM

Compare Current Terms and Settlements

	Last Year	Year 1	Year 2	Year 3	Total
Annual Dollars in 1000's					
Base Costs					
Company A/Local 123: Current Terms w/ Workforce	90,804	88,916	80,071	84,177	
Company B/Local 456: Current Terms w/ Workforce	80,655	80,759	74,923	69,264	
Company C/Local 789: Current Terms w/ Workforce	89,375	87,401	91,587	82,843	
Financial Settlement Costs					
Company A/ Local 123: Union Demands		95,253	91,070	88,385	274,714
Company A/ Local 123: Final Offer		94,211	90,798	87,817	272,733
Company B/Local 456: Proposals		83,272	78,650	71,537	233,464
Company B/Local 456: Final Offer		87,712	80,275	74,712	242,700
Company C/Local 789: Proposals		91,812	85,434	86,747	273,993
Company C/Local 789: Union Demands		92,317	97,149	88,288	277,754
Company C/Local 789: Final Offer		91,913	86,296	87,522	275,731
Notes					
Labor cost comparison for all eastern division union facilities.					

You can decide how the results on the comparison report are displayed by selecting Options from the Compare Reports toolbar. In options you can define a report caption, choose how to show the cost or savings, choose the currency. For more information on these selections see Section 12.4.4, Options. The selections in the Options dialog box in the Compare Reports screen overrides the selections made in the Options dialog box in the individual Base Cost and Settlement reports.

when comparing Proposal and Settlement reports you can display and compare the settlement report line items Cost of Proposals, the Total Financial Settlement, or the Total Economic Settlement lines. Select Options from the Compare Reports toolbar before running the report and choose which line item you want displayed on the comparison report.

When comparing Base Cost reports, the Base cost method chosen in the Options dialog box when the original report was built will be displayed on the Comparison Report. For example, if the report was saved for comparison as a single-year base only Last Year's results will appear on the Comparison Report.

You can use the standard Report Buttonbar located at the top of your report to:

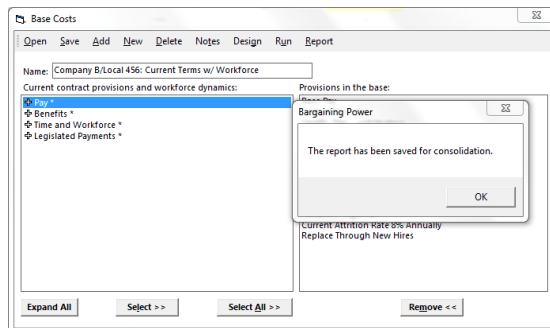
- Print your report.
- View the report at different levels of magnification.
- Navigate through your report easily.
- Export your report.

For details, see 12.3, *Report Buttonbar*.

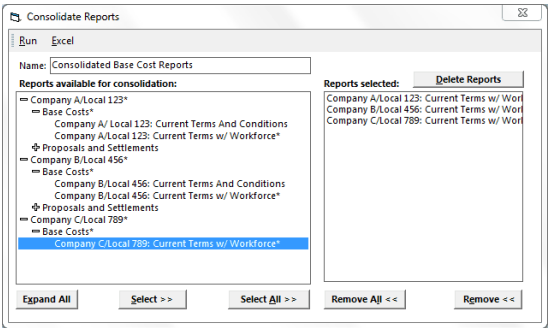
12.5.3 Consolidate Reports

To sum the results of a set of Base Costs or a set of Proposals and Settlements across multiple bargaining units, choose Consolidate Reports from the Bargaining Unit tab. All other options in the software will then be grayed out and unavailable for use.

In order to make a base cost or settlement report available for consolidation, you must first run either the Base Cost or Settlement report and then select Save for Consolidation or Save for Both from Report on the toolbar. Save for Both saves the report for Comparison and Consolidation. See Section 12.5.3 for more information on Save to Compare. When you select Save to Consolidate, the message “The report has been saved for Consolidation” will appear.



All reports saved for Consolidation appear in the Consolidated Reports window (see below).



To build a Consolidated report, select report names from the section entitled **Reports available for consolidation** and move them to the right, under **Reports selected**. Enter a report name and click Run. All provisions and proposals that have the same name and the same type will be summed and displayed as a single line item in the consolidated report. Those with different names will be displayed on their own line items even if they are of the same type.

Bargaining Power® Version 6.0 8/1/2012 1:05PM

Consolidated Base Cost Reports

Single and Multi-Year Base

	Last Year	Year 1	Year 2	Year 3
Annual Dollars in 1000's				
1. Base Pay	\$ 183,703	\$ 177,073	\$ 174,914	\$ 181,232
2. Shift Differential	982	911	845	785
3. Work Outside Title	137	139	129	126
4. Health Plan Contributions	25,096	23,992	22,941	21,939
5. Pension	3,116	3,057	3,251	2,872
6. Pension 3%	1,763	1,681	1,554	1,430
7. Pension 5%	3,048	2,954	2,855	2,768
8. Pension for New Hires 5%	0	41	40	38
9. Sick Leave	3,590	3,456	3,319	3,177
10. Vacation	7,439	6,789	7,087	7,340
11. Vacation Eligibility	3,508	3,386	3,272	3,221
12. Personal Days	1,436	1,383	1,327	1,271
13. Holidays	7,896	7,603	7,301	6,989
14. Holidays**	8,841	8,902	8,832	8,702
15. Bereavement Leave	62	59	56	53
16. Jury Duty	46	43	42	39
17. Legislated Payments	16,233	15,612	15,407	14,321
Total	\$ 266,894	\$ 257,076	\$ 253,181	\$ 236,304
**Pay for worked holiday				

In order to be consolidated, selected reports must use the same base-cost method. You cannot consolidate a base cost report with a proposal/settlement report.

You will receive an error message if you try to consolidate:

- one or more multi-year base cost reports with one or more single-year base costs reports;
- base and settlement reports;
- settlement reports that use different base-cost methods

Note: Benchmark Statistics are not currently available for Consolidation. If reports that are consolidated include Benchmark Statistics, they will not be displayed in the consolidated reports.

You can use the standard Report Buttonbar located at the top of your report to:

- Print your report.
- View the report at different levels of magnification.
- Navigate through your report easily.
- Export your report.

For details, see 12.3, *Report Buttonbar*.

12.6 Save As Base

Use the Save as Base feature to convert a settlement into a new base. Bargaining Power will convert the settlement's proposals to provisions in the new base, and you can then import a new employee database file.

When you click Save As Base, the following screen appears:

Fill in the Save Settlement as Base screen as follows:

New Bargaining Unit: Enter the name of the new bargaining unit file that you would like to create. The name can have up to 50 characters.

Next agreement: In this option, the software assumes the final year of the settlement you have created will become the new base year. The start date of the next agreement appears automatically as the day following the expiration of the settlement you are saving as a new base.

Other date: If you select this option you will be prompted to enter the date that begins the period of time you want to analyze. For example, this date may be the start of a new budget year, a new fiscal year, the date of some initiative you want to cost, or any period of time that follows the start date of the settlement you are saving as a new base. The date you enter must be the first day of a month.

Settlement/Analysis duration: Enter a whole number indicating the total length of the contract period. Use the combo box to select either years or months. The default is years.

Population data

Input method: Choose either manual entry or import. For additional information on importing data, see Section 3.1.3, *Database Mapping (Re-Import)*.

Effective date of data: This is the “as of” date of the employee database file you intend to import in to the newly-created bargaining unit. If you choose Single-year base (below) this date must be the year before the Next Agreement or Other Date. It can either be the last day of the month of that date, or the month after. If you choose Multi-year base, this date must be within a month of the Next Agreement or Other Date. For example, if the Next Agreement Date is 4/1/2015, the effective date of data can either be 3/31/2014 or 4/30/2014. If you choose multi-year base, it must be 3/31/2015 or 4/31/2015. If you enter an unacceptable date, the software will prompt you as to what the acceptable dates are. For additional information see Chapter 2, *Bargaining Unit*.

Base Costs

Save ONLY provisions, hours and workforce scenarios that are included in the named base:

“Base Cost Report Name”: Choose this option to copy the provisions and background scenarios from the named base to the new bargaining unit. The software will delete all provisions and background scenarios that are not included the named base if you select this option. You may want to save all background scenarios or provisions, even if they’re not in the named base, if, for example, you entered various scenarios for turnover or if you entered differing levels of detail that you want to maintain in group definition or payments for certain provision types.

EXCLUDE provisions, hours and workforce scenarios that are replaced by proposals included in the settlement “*Settlement Report Name*”:

Choose this option if you want the proposals in the named settlement to replace their corresponding provisions/background scenarios in the new bargaining unit. The software will delete all background scenarios and provisions that are replaced by proposals if you choose this option.

Proposals

Save proposals: Choose this option if you want to save all the proposals entered in this bargaining unit in to the new bargaining unit. All the proposals will appear in the new bargaining unit with a tilde (~) next to the name so you can easily identify them. When you click this option the following option appears:

EXCLUDE proposals that are included in the settlement “*Settlement Report Name*”: Choose this option if you do not want to save the proposals in the named settlement in the new bargaining unit. The proposals section will be blank in the new bargaining unit.

NOTE: If you do not select any of the options under Base Costs or Proposals the software will:

- Copy all the provisions and hours and workforce scenarios to the new bargaining unit file, whether they’re included in the named Base Cost report or not.
- Copy all the proposals to the new bargaining unit file and incorporate them in the Current Contract tab, whether they’re included in the named settlement or not.
- NOT copy any of the proposals from the current file to the new one. The Proposals tab will be blank.

Click Save to save the new bargaining unit. The following message will appear “The new bargaining unit has been saved”.

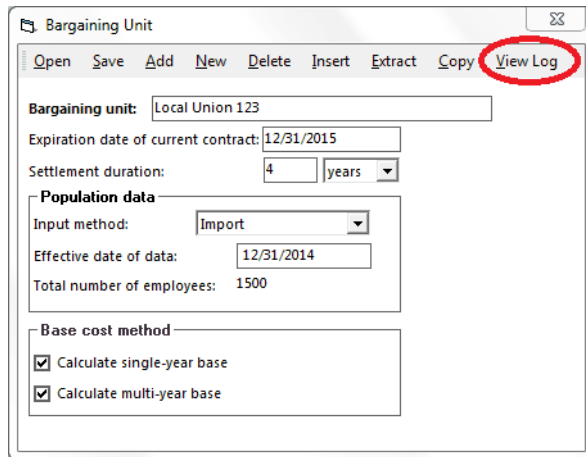
To open the new bargaining unit, go to the Bargaining Unit tab, select Open and double-click the name of the new bargaining unit file.

The software calls your attention to proposals that are saved in ways you may not expect. It generates a log to call your attention to these proposals or provisions in the bargaining unit it creates. To view the log click View Log on the Bargaining unit dialog box. See Section 12.7, *View Log*, for details.

NOTE: After the new bargaining unit has been created you must Import a new employee database file. For more information, see Section 3.1.3, *Database Mapping Re-import*.

12.7 View Log

When Bargaining Power is not able to save a proposal completely, or there is some ambiguity in the interaction between the saved proposals and the previous log is generated. The log is designed to call your attention to the provision screens you should view, and, in some cases, the log provides you with instructions.



The screenshot shows a software window titled "Bargaining Unit". It features a menu bar with the following options: Open, Save, Add, New, Delete, Insert, Extract, Copy, and View Log. The "View Log" button is circled in red. Below the menu bar, there are several input fields and sections:

- Bargaining unit:** Local Union 123
- Expiration date of current contract:** 12/31/2015
- Settlement duration:** 4 years
- Population data**
 - Input method:** Import
 - Effective date of data:** 12/31/2014
 - Total number of employees:** 1500
- Base cost method**
 - ☒ Calculate single-year base
 - ☒ Calculate multi-year base

The log is a two-column table. The left-hand side identifies the name and location of the scenario, provision or proposal of interest. The right-hand column notes the action the software took. An example appears below:

Bargaining Power® Version 6.0
8/1/2012 3:07:00PM

BARGAINING POWER LOG REPORT

Bargaining Unit Name:

<u>Navigation Path</u>	<u>Message</u>
Current Contract -> Pay -> Pay Progression -> Maintenance Mechanic Base Pay	The Entry screen is missing data for the base year. The general pay increase could not be applied to base pay provision entries.
Proposals -> General Pay Increase -> Pay Increase: Employees with 5+ years of service	The Entry screen is missing data for the base year. The general pay increase could not be applied to base pay provision entries.
Current Contract -> Pay -> Differentials -> Shift -> Shift Differential: Increase by \$0.10	All classifications have been made eligible for the new differential. Time Paid hours need to be entered.

Below is the complete list of notes the log may provide about a provision or proposal:

- The provision was not deleted.
- The Entry screen is missing data for the base year.
- The proposal saved as a provision may have incorrect effective or end dates.
- The saved proposal may have incorrect effective or end dates.
- The general pay increase could not be applied to base pay provision entries.
- The general pay increase proposal has only been applied to base pay provisions.
- All classifications have been made eligible for the new differential.
- All classifications have been made eligible for the new differential. Time Paid hours need to be entered.

12.8 Status Report

Status Report presents you with a complete list of all the hours and workforce scenarios, Current Contract Provisions, and Proposals you have entered for a bargaining unit. As you open each section, you can view the names you have assigned scenarios, provisions, and proposals, as well as the groups of employees to which you assigned them.

You can open each section individually or you can open all of the sections at once by selecting Expand All.

To print out your status report, simply click Print Report. Everything you entered for the bargaining unit will appear in the report.

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