

Budget Manager's Meeting Notes

October 22, 2020 (blue type indicates comments added during meeting)

1. Introductions (standard item)

2. Budget Development Worksheet Changes – *Kristin Smith*

All of you may have noticed a physical change to the Budget Development Worksheets for FY21. I wanted to walk through the actual sheets themselves to make sure everyone knows how to read them.

- Please note, none of the reorganizations were completed at the time of the worksheet creations.
- Some of the FY21 E&G Budget Reductions are reflected on the worksheets. Namely, the vacant position eliminations, operating budget reductions, and the travel budget reductions. The details for these reductions were provided by the VP offices earlier in FY20.
- Review of E&G BDW test file
 - Process Description: pooled together all E&G budgets, less eTuition, in accounts 600000 and 700000 to determine what percentage of that would equate to \$1M. The result was 11.74%, so each department took a 11.74% cut of their combined travel and supply budgets. We zeroed out travel regardless of amount, but made an adjustment to supplies to ensure the net cut between the two remained 11.74%.

If you have not received your Budget Development Worksheet, please contact your analyst and Kristin.

The 11.74% was a permanent reduction. Changes to that would have to come with additional resources and conversations with the executive admin council.

3. MSS/Careers Update – *Matt Paintin*

- We will start looking at position title and job code cleanups in the upcoming weeks. We will make you all aware of those cleanups as they impact your areas.

We are meeting with executive leadership next week to discuss process and get their feedback. We are developing an internal process and training which will be shared with everyone in the next few weeks.

Go live for MSS is January 18, 2021

Go live for Careers is January 25, 2021

4. Updates to Budget Amendment Form – *Kristin Smith*

The Budget Office is working with our internal ITS and the system office ITS departments to help create an automated Budget Amendment form. Our goal is to have that created, tested, and shared/trained by the end of January 2021.

- We held two focus groups last Friday to help guide us on the creation of the new form and workflow.

- Our meetings with our internal ITS department start this Friday. They are looking at building our form in Core Integrator since it has the most options for workflow tracking and levels of approval.
- We will also be meeting the ITS system office in the upcoming weeks to discuss the possibility of allowing users to enter their budget journals directly into PeopleSoft Financials.
- As we get more details in terms of the possibilities for the workflow and form itself, we will reach back out to this group for your opinions.
- The Budget Amendment form on the Budget Services website will be updated after this meeting to include a place for Reports To position and Supervisor Name for new position number requests.
[The change to the Budget Amendment Form is for when you are requesting a new position only. This change does not replace the Reports To-Supervisor Change Request form.](#)

5. Critical Hire Updates – *Terri Walthour*

Updated guidelines for the Critical Hire process have been finalized and will be on the HR website in the coming weeks. One of those documents is the ‘5 Things to Know’ document that is being shared here.

- 1) A Critical Hire form is required for all new or vacant staff and faculty administrative positions (full-time, regular), exempt or hourly, including all funding sources. Please submit one position, per form. Positions with an anticipated salary above \$40,000 will be submitted to the USG for system office approval.
- 2) All new or vacant positions require a 60-day waiting period. The 60-day waiting period may be waived upon President or Chief Business Officer approval (waiver request may be elected via the checked box on the critical hire form).
- 3) The Critical Hire Process also applies to reclassifications where a resulting pay grade is \$40,000 or higher. Reclassification is a reevaluation of a position that results in a title change and/or pay grade change (with or without a salary increase).
- 4) Promotions will also undergo the Critical Hire Process, except in the instance of career progression for positions in an established career path or structure (i.e., employee promotion/reclassification from an associate to intermediate grade).
 - a. Promotional increases above 10 percent may require additional justification and review and approval by Human Resources and the Chief Business Officer
 - b. Any transition from interim to permanent will undergo the Critical Hire process
 - c. A salary increase, which exceeds \$100,000 and exceeds the salary midpoint of the new or existing grade may require additional USG (Chancellor) approval, which the completion of the Critical Hire Process will satisfy.
- 5) UWG Internal Review: Human Resources has established an internal process to review and

validate institution position needs, as well as, personnel and pay actions that do not require USG approval or actions not permanent in nature. The Critical Hire form will serve as the primary document to review, manage and process all new and vacant position requests, reclassifications and promotions. HR may require additional forms to adhere to internal, established procedures such as in-range adjustments, supplemental pay requests, temporary or interim appointments, dual appointments, continuing education pay, etc.

Important Points

- The Critical Hire form should be initiated and completed by the appropriate administrator who is the immediate supervisor respective to the position/reclassification/promotion for consideration, and should be reviewed by the Divisional Vice President or Dean prior to submission.
- Supervisors should consult with department HR Business Partner for consultation regarding new or vacant positions, reclassification, promotions and other personnel actions prior to initiating the Critical Hire Process.
- For department or divisional reorganizations, an org chart is recommended to accompany the Critical Hire form submittal.
- For grant or contract funded positions, please submit the award letter and documentation that supports the requirements for personnel and the compensation rates that have been agreed to.
- The approval workflow has been updated to ensure appropriate CBO review prior to a final review and approval by the President (Divisional VP > Chief Business Officer > President) for all critical hire requests.
- All critical hire requests should be completed using the attached UPDATED form.
- Completed Critical Hire forms with all signed approvals should be submitted to crithire@westga.edu.
- Critical Hire requests submitted to UWG Human Resources by Monday at close of business each week may receive a response no later than Friday at 5 p.m. the same week.

For questions regarding critical hire, please contact any member of the HR/Talent Management team.

6. FY2022 Budget Process Updates – *Kristin Smith*

- Our FY21 FY2022 Budget Hearing Narrative and Budget Planning documents are all due to the Board Office on Wednesday, November 18th. All forms associated with these requests were already distributed to the VPs and the President for review. VPs have been asked to complete their divisional-specific request information by Thursday, October 30th.
- FY2021-2025 Business Plans have already been submitted out to most of the Mandatory Fee departments. These plans were shared in the same format as last year. Budget completed most of the financial information including fee projections. The official request and update forms have not been received from the system office yet.
- Initial meetings have been scheduled with our Mandatory Fee departments and the VP of Business & Fiscal Services to review the FY2021-2025 plans.
- The tuition and fee revenue projection models are being revised this year to rely more on data provided to us regarding student enrollment. We are also looking at ways to improve our projections for other self-support revenues as well (namely, course fees and sales & service revenues).

7. Fiscal Service Center Updates – *Kristin Smith*

- John Haven has already started the conversations for a Fiscal Services Center with Rick Sears and myself.
- John worked with all divisions to get a list of potential focus group members. Meetings have already been set up for these focus groups in the first few weeks of November. Follow-up focus group meetings will take place as we process in building our framework for this service center.
- We are currently in the preliminary stages of this center. We have no ideas in place for potential changes. The framework will be built after we gain more information from our focus groups. That framework will have to be vetted by various people before any changes are made. More to come!

Roundtable:

- [Kristin- for the next Budget Managers Meeting, we will bring in Bursar's office and/or Accounting to discuss revenue topics.](#)
- [Commencement ceremony has been scheduled for December 4th and they are currently looking for volunteers.](#)

Critical Hire Workflow October 2020

Initiator/
Manager

- For new or vacant staff positions, the Initiator/Manager will complete a Critical Hire form. Please note: This also applies for position reclassifications and promotions, resulting in a salary above \$40,000 and/or a change in job title and pay grade.

Human
Resources
Review

- Initiator/Manager submits critical hire form to HR Business Partner (HRBP) for position review. Human Resources completes position review and HRBP provides consultation of next steps.

Divisional
VP
Approval

- Human Resources recommends, Initiator/Manager consult with Budget Services to ensure appropriate funding. Submits critical hire form to the Divisional Vice President for review and signed approval.

CBO
Approval

- Divisional Vice President forwards critical hire form to the Chief Business Officer (CBO) for final budget review and signed approval.

VP, Admin
Services
Approval

- CBO forwards approved critical hire form to VP, Administrative Services for review and signed approval.

President
Approval

- VP, Administrative Services forwards to President for final review and signed approval.

HR
Business
Partner

- Upon receipt of required approvals, HR Business Partner notifies Initiator/Manager and advises of next steps. Please note: USG is the final approver of all critical hire requests for positions with an anticipated salary above \$40,000.



**University of West Georgia
Budget Amendment Request**

Date: 10/21/2020

REVENUE (Account Codes 4xxxx)											
Revenue Description	Ledger	Budget									Amendment Amount
		Year	Account	Fund	Dept.	Program	Class	Project			
	REVEST										
	REVEST										
	REVEST										
	REVEST										
										\$0.00	

PERSONAL SERVICES (Account Codes 5xx000)											
Department	Position Number	Employee Name	Ledger	Budget							Amendment Amount
				Year	Account	Fund	Dept.	Program	Class	Project	
			ORG_BD								
			ORG_BD								
			ORG_BD								
			ORG_BD								
			ORG_BD								
			ORG_BD								
HCM DBT Updated:	Processor		Date								\$0.00

NON-PERSONAL SERVICES (Account Codes 600000, 700000, 800000)											
Department	Ledger	Budget									Amendment Amount
		Year	Account	Fund	Dept.	Program	Class	Project			
	APPROP_BD										
	APPROP_BD										
	APPROP_BD										
	APPROP_BD										
	APPROP_BD										
	APPROP_BD										
										\$0.00	

PROJECT/GRANT											
Department	Position Number	Employee Name	Ledger	Budget							Amendment Amount
				Year	Account	Fund	Dept.	Program	Class	Project	
			PROJ_GR_BD								
			PROJ_GR_BD								
			PROJ_GR_BD								
			PROJ_GR_BD								
			PROJ_GR_BD								
			PROJ_GR_BD								
			PROJ_GR_BD								
HCM DBT Updated:	Processor		Date								\$0.00

Comments

For New Positions: Please specify which position number the new position will report to: (for more than one new position, please use the comments box) Reports To Position: 100 Reports To Manager Name: _____

Use for Funding Changes ONLY! Starting Effective Date: _____ Funding Source 1: _____ % from Source 1: _____
 Ending Effective Date: _____ Funding Source 2: _____ % from Source 2: _____
 (if necessary) Funding Source 3: _____ % from Source 3: _____

For split funding, only one position per amendment* **0.000%

Official Approver/PI _____ Date _____ Vice President (if required) _____ Date _____

Please check one box only:
 One-Time Budget Adjustment

Permanent Budget Adjustment
Permanent budget adjustments are carried forward into the next fiscal year.

Budget Mgr/Dean/Director/AVP _____ Date _____ Office of Budget Services _____ Date _____

Budget Office Use Only:

Action: _____

Date: _____ Processor: _____ # of Parts: _____

Journal ID: _____ / _____ / _____ Position Tracking Updated: _____

Ledger: _____ / _____ / _____

January 2019