

## Budget Manager's Meeting Notes

March 21, 2013

3:00 pm, Aycock Hall, 2<sup>nd</sup> Floor Conference Room

### 1. EXCEL Review (standard item) –

None this month

### 2. Introductions (standard item)

None this month

### 3. Report from the Controller's Office - Randy Miller

Randy reviewed changes for prizes, awards, and promotions. The changes apply to all Mandatory Fees.

- Prizes are not to exceed \$100.
- Promotional item purchases not to exceed \$50.
- Awards cannot exceed \$500.

Year end deadlines were reviewed and may be found on the Controller's website.

### 4. Report from Human Resources/Payroll – Juanita Hicks

Working through discrepancies with the Mercer Study. Please note that reclasses are separate from the Mercer Study and are on a different timeline.

### 5. Mercer and Sibson Salary Adjustment Process

- FY2014 Adjustments
  - Salaries will be adjusted via Budget Development. PARs are not needed.
  - The Mercer and Sibson lists of adjustments from Human Resources and the Provost's Office are due to Budget Services by April 12, 2013.
    - Adjustments confirmed after that date, are not guaranteed to be in the FY14 Budget Book.
    - Will process through PARs and amendments.
  - Funding provided by the Vice Presidents.
  - Template for identifying the funding will be sent to the VPs today.
  - Template due back to Budget Services no later than April 5, 2013.
  - Depending on the funding sources offered will need to "fund swap" some expenditures.
  - Self-support funds need to support their own adjustments. This includes fund 10600 and all special tuition categories.
  - Funding will be provided for current, active vacant positions.
  - Any unneeded dollars will be returned to the division that provided the funds.
- FY2013 Adjustments
  - Mercer and Sibson salary adjustments will be implemented May 1, 2013.
  - Summer session pay based on the Sibson amounts.
  - Funding is assumed to be within divisions' current budget.
  - Resolution of any funding shortfalls determined by the VPs and President.
  - Will use final list to implement. No PARs needed.

- Self-support funds (10600, 12xxx, 13000, 14000, 15000, 16000, & 20000) need to support their own adjustments including all special tuition categories (10500).

## **6. FY14 Budget Development**

Thank you all for your timely responses and keeping us on track! For positions that may need to be inactivated:

- On the worksheets we asked if unused positions need to be inactivated.
- Analyst will contact you for clarification if needed.
- Want to cleanup before the March 27 data extract from ADP into PeopleSoft Budget Prep module.

## **7. Summer Revenue Adjustments**

Please refer to January meeting agenda for details. Primary focus is on fund 10500 and 10600 revenues. Other funds do not lapse at the end of the fiscal year.

- List of summer 2012 revenue will be sent to budget managers today and ask to adjust for changes in summer 2013.
- Due back to Budget Services on Thursday, **March 28, 2013**.
- Will distribute one-time funding that's available this year to Vice Presidents by Monday, **April 1, 2013**.

## **8. Roundtable**

- Renee Renfrow in ITS is retiring. Brenda Valcke will be the budget contact for now.
- April is Data Security month. A USG representative will be speaking at UWG on April 5<sup>th</sup>. Please reserve your seat!
- Nursing is scheduled to move into their new building on June 14 & 15.
- Staff Appreciation Day is May 2<sup>nd</sup>. HR needs volunteers to assist with activities.
- The F.D.R exhibit in the library has extended its time at UWG. If you thought you missed it, now's your chance!

## **Academic Affairs:**

### **1. Summer Faculty Payment Process – see handout**

Reviewed the attached handout. Need to follow up with Human Resources regarding if a FCA or PAR will be needed for eCore faculty and non-teaching, non-research faculty employed during the summer.

One change to note for summer 2013, the faculty salaries will be charged to the home department and the budget authority will be transferred from the Provost Office to the departments to cover the compensation.

Questions were asked regarding the implementation of the 2013 Sibson and Mercer increases. Juanita and Liz will follow up and report back at the April meeting regarding the May 1, 2013 implementation process.

Meeting Adjourned.

## **Processing Teaching/Research Faculty Hire Paperwork for Summer 2013**

Several improvements have been requested in the process for hiring faculty during the summer. The concerns expressed by constituents involved include:

### Academic Affairs:

- Needs to know the total salary earned during the summer for regular academic term full-time faculty
- Wants a simpler process with all salaries earned on one report
- Minimize the use of PARs and use one spreadsheet

### Office of Sponsored Programs:

- Need to approve any salaries paid from grant funds.

### Budget Services:

- Need to validate sufficient budget authority exist prior to hiring employees.

### Payroll needs to know if faculty:

- Is currently employed at UWG as full-time faculty
- Worked for UWG as a part-time faculty
- Currently employed as full-time faculty at another institution
- Which distribution code/earnings code to use for payroll processing

### **Proposed Procedure:**

The Payroll and Budget Services offices reviewed the requirements and are proposing the following process for hiring faculty only during the summer sessions.

1. An Excel template will be used to hire all employees hired in a teaching or research faculty position during the summer. The template will replace PARs used in previous years.
2. The Excel template will be prepared by Budget Services and posted on our website.
3. Each college will submit one file per session and each file will have 5 tabs/templates – regular FT faculty; PT faculty; grant faculty; All Other; and the summary.
  - a. Each template will include the following data elements provided by the department:
    - 1) Position Number
    - 2) Name
    - 3) ADP ID if currently or previously employed by USG school
    - 4) Employee Type during regular academic year – full-time or part-time faculty
    - 5) Session employed in
    - 6) Session pay amount
    - 7) Chart String Data
    - 8) Purpose of Employment – Instruction, Research (*grant-funded*), or Other.
  - b. The template will be printed on the 4-part PAR paper allowing for the department/college, provost office, budget office, and payroll office to all have a signed copy.

- c. Any PARS or FCA's that are required need to be submitted along with the signed template.
- d. Academic Affairs will verify if summer earnings are within allowable amounts and Provost will sign template.
- e. Budget Services will update the template to include:
  - 1) Distribution Code
  - 2) Earnings Code
- f. The paper copy of the template, PARs, and/or FCAs will be routed first to the Dean for signature, ORSP for grant funds, then to the Provost office for signature, then to Budget, and on to Payroll.
- g. The electronic file will be emailed to the Provost office by the dean's office. The Provost's office will email the electronic file to Budget who will email to Payroll with the hardcopy.

4. When changes are needed to the template, start with the original template or the latest revision, add a new date, revision #, and highlight the data that is changed. This will keep the summary tab in the file up-to-date. Same routing process is required as in 3.d - g above.

5. If a regular-term, FT faculty is hired during summer to do work other than teaching or research (grant-sponsored), a PAR must be submitted. Examples would be offering professional development services to the university business office or designing curricula.

- a. The PAR is prepared by the department hiring.
- b. The PAR is routed to the home-department, dean's office for approval and inclusion on the summer template, routed to Provost office for approval.

*NOTE: All graduate students and faculty hired for duties other than teaching and research are hired using a PAR. Joint Staffing Agreements require Faculty Contract Amendment in lieu of PAR.*

**\*\*\*DRAFT – NOT FINAL\*\*\***