CAS Finance and Operations Meeting
October 7, 2015

New Events Coordinator (Miriam)
Bethany Robinson is the new CAS Conference and Events Coordinator. She comes to us most recently from the Downtown Athletic Club, where she was the events coordinator. She has also worked in the UO College of Business. Please let Bethany know as soon as possible about any 2015-16 events so she can begin helping you. (bethany@uoregon.edu or 6-3001)

Managers' shared drive (Sherri N.)
The managers' shared drive is going to be restructured so that security is set at the department/program level. That way, individual documents will not need to be password protected. The Dean's Office will notify you when this has been done, and let you know whether you need to do anything.

Working groups (Sherri N.)
We formed the working groups with some key goals in mind:
- Networking and learning from each other
- Fixing problems that are within CAS's scope
- Getting feedback from managers on new processes (both CAS and central)
- Providing an opportunity for interaction in a smaller group setting.

Based on attendance patterns, it seems that the working groups are useful to some of you, and not as much to others. We will distribute a survey for your feedback on the working groups and their future.

Managers' Advisory Committee (MAC) (Sherri N.)
The following managers received the most nominations, and have agreed to serve on the committee:

Natural Sciences: Shelley Elliott, Anni Elling
Social Sciences: Kristina Mollman, Jared Lindman
Humanities: Linda Campbell, Lisa Gillis
Admin: Jessica Ference.

Retreat breakout session feedback (Miriam)
Miriam distributed a summary of the feedback from our breakout activity at last month's retreat (attached). Key points addressed were:

Classified hiring pools (Shari P.): The hiring pools that CAS maintains for Office Specialist 1, Office Specialist 2, and Accounting Technician are on pause for retooling. The Dean's Office will be conducting initial reviews for minimum qualifications and specialized skills. Testing and supplemental questionnaires may be used to further narrow the pool. The attempt will be to identify the best-qualified candidates ahead of time so that when units have vacancies, the turnaround will be quick. The group noted several issues that should be kept in mind, including:

- It should be clear to applicants that this is how CAS makes all hires for these classifications; that this isn't "just a pool" (assuming we go in this direction);
- Ads should be updated regularly to state which departments are hiring.
- Care should be taken to assure proper consideration for veterans and confidentiality for internal candidates.

Volunteers to serve on interview committees are welcome.

Electronic Content Management System (ECMS) (Gordon): The RFP committee has selected Perceptive as the vendor. Central UO administration is waiting to make a funding decision until a "state of IT" memo has been released.

Budget update (Sherri N.)

The divisional specialists have entered budget changes based on personnel budget updates we are aware of so far. See the budget documents on the managers' shared drive for detail. The budget changes will post in period 3.

See tentative dates for FY 17 budgeting, in the CASweb process titled "General Operating Fund Budget Development" at https://casweb.uoregon.edu/general-operating-fund-budget-development (or do a keyword search/drilldown/find in A-Z index).

International hires (Jennifer Doreen – International Employment Specialist, HR and Kate Comiskey – International Scholar Advisor, International Affairs)

Jennifer Doreen is the new International Employment Specialist in HR. Her job is 50% labor certifications and 50% support for UO employees working overseas. Jennifer and Kate are working to integrate their functions more and automate processes. They discussed the difference between various types of visas, and various permanent residency processes. Please contact them with questions on international hire processes.

Question 1: **What HR and personnel related issues (searches, hiring, onboarding, performance management, progressive discipline, training, etc.) do you need the most support from CAS Administration to address? What does a successful supportive CAS HR unit look like to you?**

CAS "HR specialist"/Communication

- Someone who will advocate/get answers/follow up (4)
- Timely responses to inquiries (2)
- Divisional Specialist is great step towards the successful supportive CAS HR unit
- CAS HR should not duplicate central HR

Classified Pools/Pool hires

- Update the pool! Too many people, too outdated/aged, skills required don't match job needs (e.g. no emphasis on attention to detail but high need for that skill) (3)
- Market pool differently/make more specific so applicants know what they're applying for (2)
- Better communication with HR to avoid hiring delays. Make sure everyone is on the same page from beginning of search/hiring process (2)
- Acquisition specialist in Dean's office who keeps the pool updated, verifies minimum qualifications are met, vets candidates and makes the 4-5 person selection for interviews. The hiring department would then review the documents and either schedule interviews or ask for more candidates. Basically have someone in the Dean's office do the mechanics and the hiring department just work with finalist and interviews

Document Tracking/Paperwork Processing

- Timeliness of processing paperwork (contracts, searches, offers, etc.)/more sense of urgency (6)
- Transparent document tracking (3)
- Need someone in CAS to help push paperwork along/be advocate (2)
- Update from HR about NAPO status was very appreciated
- Background checks should be initiated by HR, for example HR should provide a cover letter to go along with the form the new EE has to sign so it appears the University is requesting the check not the individual or dept.
- NAPO forms should have all the elements necessary to complete an RTO, example – contract/faculty type codes
- Who does what with changes in Dean's Office?

International Hires

- Too many people/units involved. Should be central (3)

- International hire process page for CASweb. Periodically check with other offices to ensure up-to-date.
- Tie into diversity

Training/Onboarding

- Divvy up onboarding responsibilities (2)
- Unaware of when to send employees to training/want a list of recommended trainings (2)
- More training/onboarding (4)
- Unaware of how/when Dean's Office can support (4)
- Onboarding when not new (e.g. switching departments)
- Advocate in CAS for foundation training/foundation issues

Miscellaneous

- Knowledgeable
- Problem solving
- CASweb is going to help
- Sometimes there are emergency things but there is no mechanism
- Get PIs to do reviews or evaluations that they are responsible for (how can dean's office help?)
- HR has changed a lot
- Don't want to add another layer of approvals. Don't replicate what UO HR already does.
- Performance issues
- Student staff
    o health insurance/fees
    o Oversight of benefits – make sure everyone is getting what they are eligible for
- Someone who can give help with issues
- Budget clarification is key!
- FMLA, WC, Progressive discipline
    o More support/connection between CAS & HR with regard to process
- CAS support depends on how well HR is functioning
- Progressive discipline, advocate in Dean's office who can assist with small issues that have not arisen to actual progressive discipline as well as the steps in an actual progressive discipline situation. Managers expressed they are not prepared and find they have done something wrong after already engaged in the process.
- Coverage for when people are out

Question 2: **What is the most pressing issue or challenge you face? If we were to create a solution, what would it look like?**

Communication/Relationships

- Lack of communication/relationship between managers and DH/unsure of who is responsible (examples below) (4)
  - **Solution:** CAS defining relationship between manager and DH
  - **Solution:** Communication in general from CAS about who is responsible. Is it a team?
  - **Solution:** Make sure manager and DH are both viewing "final" product before it's submitted to CAS
- CASbdgmgr distribution list that managers can access
- Coordinated message or centralized posting place to reduce emails
- **Example:** Often work is sent to the head with a cc to managers and depending on the department it varies as to who actually does the work.
- **Example:** the TTF work load project currently underway. 2 managers said they assumed the DH was working on it and in the final days suddenly the DH asked the manger what the status was i.e. if the manager had completed the project. This was a running theme.
- **Example:** DH's will sometimes get requests for policy/procedure from CAS and they return it without checking with the manager. Often there are errors in what the DH thinks is happening.

Document Tracking/Paperwork Processing

- Paperwork tracking/slow processing (3)
  - **Solution:** fund ECMS
  - **Solution:** transparent document tracking so they don't have to keep checking where things are in the process
  - **Solution:** Create a document tracking system, could be housed on CASweb, can only access own department information
  - Compress timelines for benefit and pay

International Hires

- Need more HELP with international hires
  - **SOLUTION:** Gordon said HR is hiring an international hire specialist. Much needed!!!

Onboarding

- Most pressing issue: **Faculty Onboarding (3)**
  - **Solution:** Better onboarding—have checklists during training (2)
  - **Solution:** More collaborating/better understanding of interconnectivity of DH/managers/unit (2)
  - **Solution:** Better communication at all levels (2)
  - **Solution:** Business managers kept in the loop on hiring issues

Policies/Procedures

- Conflicting policies/too many exceptions to policies (2)
  - **Solution:** Comprehensive policy "tree" or web that shows how policies relate to each other and the authority of each policy as well as related current procedures
- Proactive communication for change in policy & procedure (2)

o   How to know if policies are current

Space

- People spread all over/no sense of collegiality (2)
- Grad students can't hold office hours
- **Solution:** Use space database
- **Solution:** Look at how departments are using space they have; reallocate
- **Solution:** Add a place on RTO to put where the person is going to be housed (office/building) then the space database could be updated with that info

Staffing/Workload/Expectations

- Increase in responsibilities/workload/expected to know & do too much (7)
  - o   **Solution:** workload assessment
  - o   **Solution:** Checklists for managers
  - o   **Solution:** everyone shares their to-do list (Shelley Elliot actually shared her annual calendar of "to-dos" with us about a year ago) with us and we compile a list of everything they might need to keep an eye out for. We could make available a sharable calendar or spreadsheet all managers could access and add items to that way we could avoid a lot of duplication.
- Overtime is required (4)
- Desire for shared services/help with mundane tasks (3)
  - o   **Solution:** Dean's office provides a SHARED worker that works in multiple departments.
- Most pressing issue: **staffing**
  - o   **Solution:** Specialists in CAS: HR, Travel, combining smaller offices and have one person act as CAS Dean Specialist, etc. (2)
  - o   Allow for administrative staff to be hired: one person offices
  - o   Keep size in the factor: make sure the bigger departments don't gobble up all the resources
- HR tasks take a lot of time and add a layer of review (2)
- Overlapping/conflicting deadlines within or outside of CAS
  - o   **Solution:** improved communication within the Dean's office as well as with outside units to "coordinate deadlines"; give more lead time
- Save money and add faculty—fear of cuts to staff

Miscellaneous

- Most pressing issue: **budget spent on phones**
  - o   Virtual phones
  - o   CAS could come up with a solution or a set of solutions for solving the phone stuff
  - o   Make sure in compliance with CBA
- OA Contract Renewals

- o   Department heads should not be last word on contract renewals
- o   **Solution:** Have an evaluation system where a person outside the department head gives input
  - ▪   Divisional specialists?
  - ▪   Tenure case model?
- Grants, travel, etc have grown
  - o   Number of students and number of fees have gone up
- HR needs to focus on solution, not the problem
- Anna's RTO checklist is awesome
- Moving approval—nice expedited process
- Help with all types of contracts.
  - o   **SOLUTION:** Call me, if I don't know I'll do my best to figure it out.
- Be able to move positions within CAS e.g. internal recruiting first
- Fall term RTO & GTFs—may not be CAS issue
- Retention/archival email annually
- Interdepartmental fund transfers
  - o   Time consuming
  - o   Departments handle differently
  - o   Standardize process