

**CAS Finance and Operations Meeting  
March 21, 2018**

**FY 19 beginning budget (Sherri)**

Non-general fund beginning budget spreadsheets will be on the Business-Managers shared drive by the end of the day. Please complete these and let your divisional specialist know when you are finished. Deadline is April 4 so that CAS can meet BRP's deadline.

**Dreamer Ally training (Miriam)**

Managers are strongly encouraged to attend the Dreamer Ally training on April 18. The training has two parts. The first part will take place from 8:30 to 10:00 during our regular heads and managers meeting. You are invited to stay for the second part, which goes until 12:45 and includes lunch, if you're interested and able. More information has been distributed via the email digest and the cas-allempts listserv.

**Collaborative services updates (Miriam, Melissa Bowers, Marie Greig, Rebecca Roby)**

Melissa, Marie, and Rebecca shared information about their respective collaborative services projects.

Melissa has been working in OCIAS, English and Folklore since December 1. This pilot is based on an MOU that runs through June 30, 2018, at which point the parties will decide whether to extend the arrangement, cancel the arrangement, or make it permanent. Melissa shared what she has learned so far. Challenges include 1. Can't be in two places at once; 2. Level of response to English/Folklore (her original home units) has decreased a bit; 3. One person can't do two jobs, so level of staffing will have to be maintained or increased. Opportunities include: sharing and comparing practices to find what works the best; more varied tasks to offer staff and increase their specialization and ability to work on things that interest them. Some things managers do can be assigned to other staff, and enable the manager do more strategic/management work.

The Accounting Technician vacancy in OCIAS at the start of the pilot made the transition slightly more stressful for staff than it would otherwise have been. Faculty have noticed Melissa's physical absence when she is in the other unit, but she hasn't noted any strong reactions.

Rebecca (Psychology) has been collaborating with Linguistics since Linda Campbell's retirement and Mischelle Pennoyer's FTE reduction. Others, including Marie, have stepped in to complete various tasks in the interim before we hire a new manager to be housed in Linguistics. Rebecca said that the co-location makes collaboration fairly easy. Marie looked at the accounting structure and processes in place in Linguistics and presented a report to the Dean's Office. Rebecca believes a longer-term view will be important and she looks forward to roles being well defined.

**Announcements**

*Summer Term:* Summer term faculty teaching appointment packets (PRF, PAW, teaching appointment memo) are due to CAS on May 1. HR has extended their deadline, so we extended ours.

*HR pooled position process meeting:* If you are interested in helping HR streamline the pooled position recruitment and hiring process, please contact Talent Acquisition to let them know you would like to attend an upcoming meeting they are scheduling.

*Concur Travel:* is going live on Monday (update 3/28: not yet). We discussed various processes and workflows, but the takeaway is really that everyone should go to a “sandbox” training to get hands-on experience with the types of travel that occur in their unit.