

Budget Advisory Committee (BAC) Guide Sheet

These items are a dynamic list which will be updated as we move forward.

RAF Review:

The committee will be looking for the specific items..

Process:

1. Positions Description should be updated through HR.
2. RAF created and submitted to the BAC.
 - a. Cover Sheet (*Item 1*)
 - b. RAF
 - c. Updated Position Description
3. The BAC will review and either recommend approval or work with the director regarding feedback or suggestions.

RAF Review Criteria 2015:

1. Do responsibilities or workload differ depending on the season (summer/academic year)? Please explain.
2. What offices does this position collaborate with, inside and/or outside the Division?
3. Briefly describe how this position supports the mission of your office and the overall Division
4. With whom have you discussed the possibility of developing a shared services position? Please describe the outcome.
5. Are there any other opportunities in this role description to support other units in our division? If yes, how and which offices? | If no, please explain.
6. Are you increasing/decreasing the salary? If you are increasing, what is the funding source for the salary difference and non-health benefits (must be contributed to the benefits pool)?
7. New position: What is the funding strategy? (Salary/Full Benefits Pool Contribution)
8. Risk Assessment: If the funding for this position is reallocated, what is your strategy for the redistribution of duties?

Shared Services Model

The BAC will review appropriate positions for shared services potential. The criteria employed are as follows:

- Administrative Support
 - Provide frontline support for areas in promising locations.
- Accounting
 - Accounts payable and receivable processing (invoices, p-cards, travel, recharges)
 - Verifying monthly expenses and income
 - Generating financial reports and analyses

- Budgeting
 - Providing budget analysis and recommendations
 - Reviewing and updating salary budget adjustments
 - Entering annual budgets into online tool
- Information Technology
 - Providing helpdesk support
 - Providing network/software support
 - Providing program development creation and support
- Human resources
 - Payroll monitoring and changes (EPAFs)
 - Hiring search process support
- Procurement <\$25K

Search Committee Make-up:

Search committees are a good way to include others from outside the Division and outside our units. In light of this opportunity, search committees should be made up of the following:

Entry – Low Level Positions

1. Internal Unit Representative(s)
2. External to the unit, Division Representative(s)

Mid to High Level Positions or any position that collaborates with Division units and/or collaborates with other University entities.

1. Internal Unit Representative(s)
2. External to the unit, Division Representative(s)
3. External to the Division Representative(s)

Search committee membership must be completed.

Salary Differences:

The VPSS will ordinarily sweep 50% of any salary differences from positions being replaced by a lower salary. Directors have the option to request some or all of the remaining 50% by submitting a proposal to the BAC (Please be advised, requests above the 50% will be reviewed closely and critically and our assumption is the funding will be returned only on the basis of demonstrably extraordinary need). The proposal should be a one page description of the planned usage of the funds; which may include but is not limited to shared services, collaborative efforts in the Division, internal programs, or salary adjustments (any increased salary should include a plan for the increased contribution to the benefits pool for non-health benefits). If the request includes a new program or project, the director will need to include the description of the program/project, assessment plan, and exit strategy should the program/project fail to meet expectations.

Salary Adjustments/Post Retirement Review (Item 2, 3, 4)

Salary Adjustments

In order to address concerns by OCHE, HR has created a new process for Salary Adjustments (SAF). If your department would like to submit a salary adjustment, please submit the initial SAF to the BAC. The BAC will review and make necessary recommendations to the VPSS. We will be following all guidelines and guidance from HR on all SAFs; HR will work with departments to do the leg work on all SAFs.

Salary adjustments are appropriate when the changes to an employee's duties fit this category:

- The new duties exist outside the current scope and/or are at a higher level of responsibility.
- The duties are permanent to this position and these duties will not be included in the position description for the next employee.

The documentation for the BAC should include the justification for the salary increase and the funding strategy for the salary increase and the non-health benefits contribution to the benefits pool.

Post Retirements Contracts (PRC)

Post retirements are looked at very critically by OCHE, we will be following all guidelines and guidance from HR on these contracts. At this time, PRC will be a FYI for BAC.

Please contact Jen Joyce before you begin the process of a post-retirement.