

Staff Council President's Report

October 14, 2009

Issues to Highlight

Compensation –

Board of Regents will be approving FY11 budget to send to legislature at upcoming 10/30 meeting in Fairbanks. Current budget has 3%

Paperless Job Project

This project moves staff from paper to paperless time sheets. (See Discovery Proposal Attached)

Cell Phone Policy (Draft Policy Attached)

New IRS rules affect use of cell phones

<http://www.irs.gov/govt/fslg/article/0,,id=167154,00.html>

Committee Meetings

Faculty Senate – October 12, 2009, Next Meeting November 9, 2009

<http://www.uaf.edu/uafgov/facultySenate.html>

Governance Coordinating Committee – Meeting Scheduled 10/26/09 Meets twice a semester

<http://www.uaf.edu/uafgov/coordcommittee.html>

Staff Alliance – Meeting Scheduled 10/13/09

<http://gov.alaska.edu/Staff/Agendas/>

HR Council Met October 1, 2009

JHCC

Still considering the possibility of a Dependant Audit, but have concerns about effectiveness, true savings and effort involved in completing the audit.

\$300 K in Wellness funds, discussion on how to spend.

Deluxe health care plan attracts those who have the most need for service. Premiums are not covering costs. M Humphrey expects rates will continue to rise on deluxe plan until it becomes price prohibitive.

New CD for Employees on benefits.

Training

Access to Skill soft training has been approved for volunteers and employees in layoff status.

Student Wages discussion (See Bus. council note)

Discussion regarding the need for conduction reference checks when considering hiring an employee previously employed at the university.

TOAD – replacement for data browser, HR staff is receiving training and finance staff will be receiving the training shortly.

UAFT -

Upper Division issue

Ongoing union issue regarding representation of faculty members that teach upper division courses. Extensive info at: <http://www.alaska.edu/labor/whats-new/>

Contract renewal negotiations have begun. Jim Mullen is UA's lead negotiator. Sessions are held in Anchorage.

Business Council Met October 6, 2009 –

Budget Fixed Costs

Discussion on prioritizing these costs for legislature

Student Wages

Proposal to raise student wages to have starting wage come up to minimum wage increase in January. Discussion regarding across the board increase. ASUAF recommended \$1.00 Business council agreed to propose increasing ATB by 25 cents for FY11 and to look at increasing wages by additional 25 cent amounts in future years.

Cell phone policy

Proposed draft cell phone policy needed to comply with IRS standards and to determine who authorizes cell phone allowances. Discussion on implementation and who approves. Action postponed until November meeting.

Evaluation Committee

This committee is meeting regularly working on developing a consistent performance evaluation tool to be used throughout UA. Currently working on performance factor definitions

Chancellor Pre-Staff October 12, 2009

Discussion of upcoming staff council

Other References

MacTaggart Report

<http://www.uaf.edu/chancellor/communications/AlaskaReport0809.pdf>

Information Technology Executive Council (ITEC)

<http://www.alaska.edu/itec/>

University of Alaska

ITEC Discovery Proposal for

Electronic Timesheets – Web Time Entry Using Banner Employee Self-Service (UA Online)

EXECUTIVE SUMMARY

This proposal explores the risks, resource needs, costs, impacts and collaborations necessary to implement the existing web-time entry module in Banner. Web time-entry has been available in Banner since 2004 through Banner Employee Self Service (BESS) which powers UA Online and is part of our current Banner package. This proposal recommends implementing web-time entry with a control group, such as MAU Administrative Services divisions, before implementing system-wide. This proposal is promulgated by UAF Vice-Chancellor for Administrative Services Pat Pitney.

- **Purpose**
 - *Please provide a clear purpose statement in a brief form. Refer to guidelines document for the evaluation criteria of proposals.*
 - *What will this project do for the university?*
 - *What are the intended outcomes of this project?*
 - *What are the existing problems that will be mitigated by this project?*
 - *What is the planned discovery phase completion date?*
 - *What is the planned project initiation date?*

This project will eliminate or substantially reduce our system-wide use of paper timesheets and theoretically will result in cost savings through reducing paper, eliminating staff and administrative time required to manually process paper timesheets, streamlining data-entry, freeing physical space which is used to store paper timesheets and eliminating our use of microfilm to preserve timesheets. The project will result in a “greener” University, greater efficiency and wiser use of resources.

This project, along with a companion project, grant-effort reporting, will eventually move UA faculty to exception reporting, which requires that faculty report only changes in percent of effort on a quarterly or bi-yearly basis, which contrasts with our present system that requires faculty to complete time sheets biweekly in order to certify effort.

Target discovery phase completion is 9.30.09. Planned initiation date is TBA.

- **Strategic Plan Alignment**

- *How does this project align with the following:*
- *UA and MAU Strategic Goals*
- *State Needs*
- *Educational Programs*
- *Technology & Facilities*
- *Students*
- *Research*
- *Faculty & Staff*
- *Alignment with Business Processes and IT*

The project frees up staff and administrative time to focus on the mission of research and educating students. The project aligns with sustainability goals by eliminating our yearly use of hundreds of thousands of pieces of paper which ultimately end up in the landfills. The project has desirable public relations outcomes by allowing the University to receive credit for its “green” efforts and efficiency measures. The project makes use of existing and available technology (Banner Employee Self Service which powers UA Online) and aligns with our goal to streamline business processes. The project moves University employees toward greater use of technology, which increases user acceptance and ultimately makes it easier to implement future technology changes such as grant effort reporting .

- **Risk**

- *Consider risk associated with doing the project and not doing the project.*

The risks of not doing the project are low from a functional standpoint; UA can continue with paper timesheets and manual data entry. At UAF, this process results in over 400 staff hours per month on timesheet printing, distributing, tracking, signing, alphabetizing, data-entering, filing and storing.

UAA presently does not require paper timesheets for exempt staff (non-grant funded) with no reportable leave. UAS and UAF require timesheets even if there is no reportable leave. UAF and UAS could adopt the UAA method and achieve some additional efficiency and reduction in paper and processing even without adopting electronic timesheets.

There are project risks which are briefly discussed below, along with proposed solutions and/or identification of needed input from a larger group to generate solutions. This list is not exhaustive and the project proponents expect other risks to be identified during discussion phases.

Project proponents believe that interfacing with other Universities who have adopted Banner’s web-time entry is important in implementing at UA. We should first visit, or invite in, other higher ed project managers who have successfully implemented to

help us identify challenges and adopt strategies that were successful. During proposal preparation, the project manager contacted several institutions who have implemented Banner web-time entry, including University of San Francisco, University of California system, Eastern Washington University (EWU), and others. Project manager reviewed numerous on-line tutorials, FAQs, communication plans and written documentation created by other Universities. All of these available resources serve to lower risk by providing existing models.

In no particular order, identified UA risks are:

- General risk inherent in any new technology. May be overcome by testing, and interfacing with Universities who have already adopted Banner's web-time entry. Recommend choosing a project manager who is willing to travel on-site to other Universities to discuss/review their challenges and their solutions.
- Employee resistance. May be overcome by "experimenting" on a target group to identify and fix bugs before rolling out a system-wide adoption; through effective, repetitive change communication; by training, by top-down advocacy for new system, i.e., our Chancellors and Vice-Chancellors urging adoption, by leveraging "green" aspects of electronic timesheets.
- Faculty resistance. Partially overcome by phasing implementation to address faculty groups last, which will allow perfection of systems, communication and processes before impacting faculty. Faculty may be timesheet approvers in some areas and will have to adopt, or proxy, approval. May be overcome by reassuring faculty that UA is automating a process that currently runs on paper; we are adding no greater faculty oversight measures than that which already exist through paper timesheets and manual data entry. May be overcome with training, communication, and identifying and leveraging faculty interests to increase acceptance. Since our paper timesheets are presently the only means of certifying faculty effort on sponsored projects, unless electronic timesheets can be modified to capture this same information, UA may not be able to implement faculty electronic timesheets without first perfecting grant-effort reporting. Requires Sungard and or internal expertise to further vet faculty adoption.
- Employees who are grant funded in whole or part. This group must also certify effort. Same challenges as faculty will apply.
- Local 6070-Crafts and Trades resistance. 6070 is an employee group that traditionally does not use, nor have access to, computers. This group may be less computer literate than other groups and thus have difficulty adopting an electronic timesheet system. EWU experienced this same issue. May be overcome initially by continuing paper timesheets for this group or by offering incentives and training to adopt new system. May be overcome in the long-run by requiring all new hires to possess the minimum computer skills required to operate the timesheet system. UA may facilitate adoption by providing accessible computers for 6070 use in-shops and by providing administrative personnel to sit with employees on timesheet day and perform one-on-one training sessions in real time until employee expertise is achieved (a process adopted by EWU during its implementation).
- Leave Approval Process Implementation. Banner Employee Self-Service ("BESS", which powers UA Online) provides a mechanism to process leave requests and populate approved leave into the electronic timesheet for employee

- acceptance or revision. This process may not be critical and should be examined for value-added. Adoption of this process may not work with faculty. There is a risk that web-time entry module must be adopted in whole. If UA cannot adopt web-time entry without leave approval, then the project may fail. The discovery project manager cannot determine this risk without the participation of Sungard, who was unable to meet project deadlines for a meeting prior to 9.30.09.
- Supervisor/Approver identification: UA presently has no easy mechanism to identify supervisors/timesheet approvers. There is a risk that we will not be able to effectively identify supervisors in order to implement. If we do identify supervisors/approvers, there is a risk that this group is not static and constant updating would have to occur. May be possible to leverage department input to identify and update supervisors/approvers. Need larger group discussion to identify sustainable solutions. Identifying supervisors has a benefit and usefulness system-wide for other purposes, such as training tracking and other applications beyond timesheet approvals.
 - **Funding Estimate**
 - *Total Cost of Ownership consists of Estimate of Development Cost, Implementation Cost, Operations and Maintenance Cost. Provide a complete and comprehensive estimate of the following.*
 - *Personnel*
 - *Development*
 - *Implementation*
 - *Operations & Maintenance*
 - *Source of Funds*

Personnel Required: TBD. Adoption of BESS web-time entry requires modification of existing Banner rule forms and establishing other parameters in Banner. Some of the rules will have to be identified and agreed upon by MAU HR Departments (i.e., deadlines for employee entry and notifications/actions to/by approvers, establishment of security classes, etc.) Many of these deadlines/rules already exist in the current manual procedure but identity of approvers will have to be captured. After agreement on rules/forms the data must be entered into Banner. This may be accomplished by IT or other programmers with access to modify Banner HRIS. Discovery project manager does not believe the actual entry requires HR expertise as that expertise is applied earlier by the working group. Cost of programming personnel depends on who is assigned to this task; cost of MAU HR experts to identify rules depends on who is assigned to this task.

Development Required: TBD, but existing technology eliminates need for much development; BESS web-time entry is available in the current Banner release. Development of a supervisor list in order to populate the “reports to” fields in Banner (to route timesheet approvals) is a development cost and would represent a significant investment of time and resources by campus HR offices and/or campus departments.

Implementation: TBD. Cost of implementation includes training, communication, departmental time devoted to these activities. Need larger group discussion to fully identify implementation costs by using information from other adopters as our model to fashion UA’s implementation plan and then to identify costs.

Operations and Maintenance: TBD. Need larger group discussion to identify ongoing costs of operation and maintenance. Expected to be minimal and/or absorbed in current operations and maintenance costs of Banner HRIS but will include possible frequent updating to account for supervisor/approver changes. Data for determining on-going ops and maintenance costs should be obtained from other University adopters in order to assess UA's possible costs.

Source of Funds: TBD

- **Make or Buy Analysis** (Internal vs. External Outsourcing)
 - *Address associate risks – if external identify point of transition and cost to user at transition*
 - *Are resources available*

Recommend using existing Banner technology.

- **Acquisition Plan**

No acquisition required.

- **ACAS Funding Transition Point**
 - *Identification of transition point from ACAS (Discovery) funding to user funded.*

TBD

- **Planning Phase Date**
 - *Planned discovery phase completion date or anticipated project initiation date.*
 - *If project is already executing when will it finish?*
 - *Attach a schedule, if appropriate, or explain how the planning dates provided above were derived.*

An initial discovery proposal will be finalized by 9/30/09. Project manager requires consultation with Sungard, IT and SWHR to complete specific areas of the discovery proposal regarding cost.

- **Functional Requirements**
 - *What must be done before this project can be implemented?*
 - *Is the underlying business process updated enough to support the project?*

The underlying business process is one of paper timesheets. It is adequately developed, calendared, regulated and updated to provide most of the needed functional information to switch to web-time entry.

Additional business intelligence required is the identity of supervisors and/or other timesheet approvers in order to implement.

Development by a working group will be required to identify other approvers, proxies, superusers and additional security issues.

- **Scope of Impact**

- *Who and what other functions will the project affect?*

All departments will be impacted by the need to switch to web-time entry and all employees will be impacted.

The project will impact MAU HR offices by requiring additional effort to capture current business processes and business intelligence which will require reallocating resources to address project needs.

The project will impact IT and programmers required to update Banner rules forms, etc. on advice and guidance from HR offices.

- **Competition**

- *What other projects might compete with the project?*

Anticipate this project competes with all other projects on the HR project list, as posted on the PMT website. However, project manager recommends that since many of the deadlines and information/business processes/business intelligence is already developed from our paper timesheets processes, that a small working MAU HR payroll group could assist in rapidly identifying information needs to activate BESS web-time entry and could facilitate implementation on a shorter timeline.

Project Manager needs larger discussion with IT regarding project competition with that group.

- **Interrelationships & Interfaces –**

- *What relationships are necessary?*
 - *Software/Hardware*
 - *Departmental*
 - *Process*
 - *Other MAU or agencies*

See above.

- **Has this proposal been reviewed by the appropriate system-wide Executive Council (e.g. SAC, BC, or RAC)?**

TBD, Project Manager currently has no knowledge of the discussions at/between other groups.

University of Alaska
Mobile Communication Devices
Policy and Procedures

Date issued: (Draft 10/5/09)

Purpose

This policy addresses the use of mobile communication devices for business purposes and methods for making such devices available to employees. Mobile communication devices are devices with mobile access plans for connection, such as cell phones, personal digital assistants (PDA's) or Blackberries.

Scope

University of Alaska System

Policy

This policy identifies three categories where the university will provide for the cost of mobile communication devices when used for business purposes:

- the university temporarily loans employer-owned devices to certain employees or groups that are required to have access
- the university provides a taxable allowance to approved employees for employee-owned devices
- the university reimburses the cost of infrequent business calls. This category does not include the employees identified in the other categories.

A. Employer-owned Devices

The university will temporarily loan a mobile communication device when required for business purposes. A university business purpose for having a mobile device is one where:

- the employee is responsible in emergency matters, such as police, fire, environmental health and safety, where they must be available 100% of the identified business period or,
- the employee does not have access to a landline or other communication device when doing a substantial portion of his or her job (defined as 75% of the business period) or,
- a group of employees, such as facilities, human resources, or information technology personnel, has the need for group or shared devices for purposes such as rotating on-call contact.

The business period is the time that the employee must be accessible by the institution.

Each department is responsible for acquiring, tracking and distributing mobile devices in accordance with this policy. The mobile device is university property and will be used by the employee for university business purposes only. Mobile devices are not to be used for personal purposes; any personal use should be limited to incidental or emergency situations.

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Mobile Communication Devices
Policy and Procedures

Departments are required to maintain adequate records that track use, such as name of employee, time out and time returned. In accordance with the Internal Revenue Code, the employee should keep a record of each call and its business purpose. If calls are itemized on a monthly statement, they should be identifiable as personal or business, and the employee should retain any supporting evidence of the business calls. This information should be submitted to the unit, who must maintain these records to support the exclusion of the device use from the employee's wages.

In the rare case that an employer-provided cell phone is used for personal use, the employee must reimburse the university for that use, subject to the following conditions:

1. The reimbursement rate shall be \$0.20 per minute for personal use, or the actual cost to the department, whichever is greater.
2. The reimbursement shall occur within 30 days after the department receives its communications bill.

B. Allowance Method for Employee-owned Devices

It may be necessary for some employees to use mobile devices to conduct university business on a regular basis. Under this method, the university provides a taxable, cash allowance to approved employees for the use of employee-owned devices. The university president or campus chancellor determines when an allowance is appropriate and approves all allowances. This authority may not be delegated.

A taxable allowance form (to be created) must be completed and approved. Taxes incurred are the responsibility of the employee and will not be reimbursed.

The monthly plan allowance should only cover the estimated business-related costs. In no cases may the amount exceed the cost of the employee's monthly service. The allowance is not expected to cover the full cost of the plan given that the device is expected to be used for business and personal purposes. Documentation showing the cost of the service plan must be submitted with the taxable allowance form. The allowance amount should be reevaluated annually or upon changes in the plan's cost.

C. Reimbursement of Infrequent Business Calls

Some employees may use their personal mobile device for business purposes on an irregular basis and incur an additional expense, but are not approved on the allowance method. Incremental costs to be reimbursed are those additional costs incurred due to business use, over the monthly plan cost. For example, if the employee is charged for 20 minutes in excess of plan minutes and 15 minutes of business calls are identified that month, the employee is reimbursed for the cost of 15 minutes. These reimbursement requests should be infrequent in nature (such that it would be more appropriate that a monthly allowance be established).

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The employee is responsible for presenting a bill that clearly demonstrates the charges incurred and documents the business purpose. The reimbursement must be approved by the vice president, dean, or director of the unit.

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