

Business Administrator Meeting Recap Notes

Friday, April 14, 2023, at 10 a.m.

Bayou Building, Room 2230

Meeting Co-Facilitators: Mark Denney and Deja Sero; **Attendees:** Krista Buckminster, Robin Shannon, Darron Johnson, Rich Stebbins, April Felan-Butler, Becky (COE office), Andrea Sears, Debbie Carpenter, Leanne Howell, Cindy Saltzman, Abby Varela, Yolanda Edmond, Miriam Rouziek, Juan Olguin, Rhonda Warner, Dr. Sherry Hawn, Lea Black, Nicole Lenderman, Greg Haines, and DeAngel Bonilla (via Teams)

1. Deja: Introduction

Welcome to the Planning and Budget Office: Luisa Gallegos, Budget Analyst III (Starting April 17th)

2. Agenda Items:

1. Mark Denney – Admin and Finance Updates

- **CBMI 2023**

Thanks to all the C/DBAs who indicated their interest in attending CBMI this July. It will cost approximately \$20,000 for 10 UHCL C/DBAs to attend. Even though the costs will be a lot higher for all of these individuals to attend, Mark will not go back on his word. Mark will be following up with the Managers to confirm their support for their C/DBAs to attend and commit to the program for 3 years.

- **Budget Development**

This is crucial and it takes top priority.

- **The purpose of the Set Aside Budget**

The Set Aside Budget is for what we know will happen with our staff's pay and we must budget for all salary activities and events. We want to know what will occur between the middle of June and September 1st. It is meant for reclassifications and so we don't have to stop, go back and re-do budget authority (per UH System). It's not for whole departments to do re-orgs. If you do this, that will need to go through the Budget process, and have discussions with the VPs and with President Walker. It's also for when we hire replacements to previous positions, but due to a variety of events and to get an incumbent, we have to do an increase in pay. It is not for divisions and departments to use for new initiatives. It's for little things that may occur throughout the year. The Set Aside Budget has only been available for the last 2 years.

On the next Budget Cycle, we will likely (not definite) place Set Aside centrally in the University, and have each division identify things that come us (as they occur) to Planning & Budget who will pass the dollars out.

Question from DeAngel: If things are complete and compensation study for an entire department to bring them up to market, but the department does not have the funds, is that the appropriate use for Set Aside? Response from Mark: The Set Aside would likely not be that big to do Set Aside, but if the position is centrally funded and the goal is to bring the positions up to market, we will dedicate resources to do this and not use Set Aside for that purpose. A new Set Aside is given every fiscal year at 0.5%. It's not always a guarantee, but we will always do our best.

The real issue is that Set Aside dollars have been available and we have made equity adjustments, but due to market, we are not getting requests. We may see the front end and its improved, but on the back-end, we don't see when the person is hired and we do not see the actual salaries; we only see the range. We need C/DBAs to reach out and let us know about the actual amounts.

***Action item:** We will now ask all of the C/DBAs to let Planning and Budget know about their Set Aside funds on a monthly basis.

We don't budget by position, we budget by pool to help give managers flexibility to determine how to use their funds. You could choose to have one highly-paid employee or 2 or 3 to get the job done.

2. **Andrea Sears - CBMI registration and Travel forms.** Which cost center are we using?
 - a. Regular Registration deadline: 6/30/2023
 - b. CBMI Registration fee: \$675 (through 6/30/2023); \$725 (7/1-7/17/2023)
 - c. CBMI Registration website: <https://sacubo.memberclicks.net/2023-cbmi-registration>
 - d. The cost for C/DBAs to attend will be covered by A&F

***Action item:** Mark and Shirley will be handling communications and registration for all the C/DBAs who will be attending CBMI. It should be a combined total of approximately \$20,000 out of Mark's budget for all 10-11 C/DBAs to attend, but Mark is going to reach out to senior supervisors and ensure that participants are willing and able to commit to the program for the 3 years. Mark is funding it and will continue to fund it because he feels that this program is a priority to the university and it helps enhance campus operations. If anyone attends this year, but later decides not to or that it is not a priority, Mark will expect some funds to be returned to his cost center. However, if personal issues arise that prevent participants from returning, Mark will make an exception. Registration is expected to begin very soon.

3. Leanne Howell (on behalf of Rosie Pineda)– Copier PO Payment Training schedules

All of the new Canon copiers have been installed. During the last week of April (the 25th-27th), an invitation sent out to the attend one of the Copier PO Payment training sessions. ***Action item:** Leanne asked for all C/DBAs to send Rosie a list of all of their department contacts, which will be used for sending out the invitations. (Deja also asked April to make a note to find out how we will pay for the copiers). Mark has been working with Dr. Gaskins and Dr. Hawn to have a central single copier contract for the university. ***Action item:** Mark will be contacting DeAngel to create a planning group with Academic Affairs team members, as well. This would give us only one contract to manage, which would simplify and lower the costs substantially.

4. Deja Sero - Planning & Budget Updates

Budget Development reminders: Moving forward, starting 9/1, there will be a schedule for departments and cost centers and deadlines for Budget Development. These should have been completed before loading into Hyperion. The late entries have just increased the workload because manual entries will need to be completed. Krista and Deja will review the budget timeline and activities that it takes to address with UHS by April 30th and allow C/DBAs to go back into Hyperion after the institutional entries to make any pending changes for 1-2 weeks to finish workflow approval and Accounting.

For C/DBAs who have had Department Tree forms returned to them: we are also trying to conform the office names by eliminating the prefix "Office of..." Or "Department Of..." from all offices. These prefixes will only be reserved for the Vice Presidents' offices and for the Office of the President. This does not eliminate your leaders/managers from communicating the office title externally than what is in PeopleSoft. The name conformity is only for reporting purposes and they are furnished to the Board of Regents and to UHS, so this helps give it more of a polished look. Please submit them ASAP, especially since Accounting will have a lot of entries to complete.

Regarding enrollment projections and Tuition and Fee Adjustments, we are very unsure and cannot provide any information at this time. Deja is working on project updates for the fall and will provide preliminary information as soon as possible. Mark and Deja will be meeting in middle of May (approximately May 15th). It will be a headcount and it will be converted to SCH since not every student takes the same amount of credit hours in a given semester. We have been trying to partner with Student Enrollment Management and Student Success Initiatives. This is the first time we've really partnered in getting the numbers together.

Position and FTE Tool: Deja sent out this info and include info with Budgets and how they were all funded. It is simply a tool to see where they are funded and where there might be errors; no need to reconcile. It's just to track budget nodes and catch any potential errors or things that need to be fixed. This is to provide us with feedback and let us know if we missed anything. A lot was corrected before it was sent out. ***Action item:** Deja will send a list of the base journals prior to load #2 to different divisions and units. Our goal is 100% completion so there is no extra legwork to do on 9/1.

3. Meeting and Office Etiquette Tips (from the ASCEND Training Business Etiquette Session):

- a. Be on time
- b. Be prepared
- c. Respect others' speaking times
- d. Ask relevant questions
- e. Follow the Chain of Command
- f. Be positive
- g. Be present – avoid distractions (Ex. phone, laptop, etc.)
- h. Be mindful of the noise

The entire Planning & Budget team attended the Business Etiquette Ascend training session a few weeks ago and wanted to share takeaways from the session. Darron Johnson mentioned the tip to be more open and aware of our perception that we give off to others. For example, when out in the hallway, keep your head up and greet other fellow staff members. UHCL is more of a front-facing community and Darron mentioned that at UH, he primarily interacted with people from his office, but not much from the other departments. April Felan-Butler mentioned that her favorite takeaway from the course was about warm vs. cold transfers and how knowing the difference between the 2 can enhance office operations and eliminate having to repeat ourselves over and over. Deja mentioned the importance of avoiding “email ping pong” by picking up the phone to get a quick answer out of someone.

Next Business Administrator Meeting date:

- Friday, May 12th (Time and Location TBD)