



# **FAS Department Administrators' Meetings**

**October 9<sup>th</sup> – 11<sup>th</sup>  
2007**



# Agenda

Fiscal Year 2007 Year-End Results

Deena Giancotti

New Endowment Distribution Guidance

Deena Giancotti

FAS Budget Updates

- Enterprise Planning & Budgeting System Project
- FY09 Budget Planning

Eric Kopstain, Cathy Lloyd  
& Jason Shaffner  
Nissa Knight

Funding Vacation Payouts & the Historical Liability

Carolyn MacLeod

Revised FAS Spending Policy

Carolyn MacLeod

FAS Training News

Carolyn MacLeod

- Enhanced Financial Management
- International Office Informational Training
- FAS Finance Fundamentals Pilot Program
- Travel and Reimbursement Brown Bag

HR Updates

- New HUCTW Contract Highlights
- Paid Time Off Update
- Pre-Employment Screening
- Performance Management Update

Chris Kruegler  
Mary Straub



# Faculty of Arts and Sciences Summary of Fiscal Year 2007 Results

**Deena Giancotti**



# Increase in 2008 Endowment Payout

**Deena Giancotti**



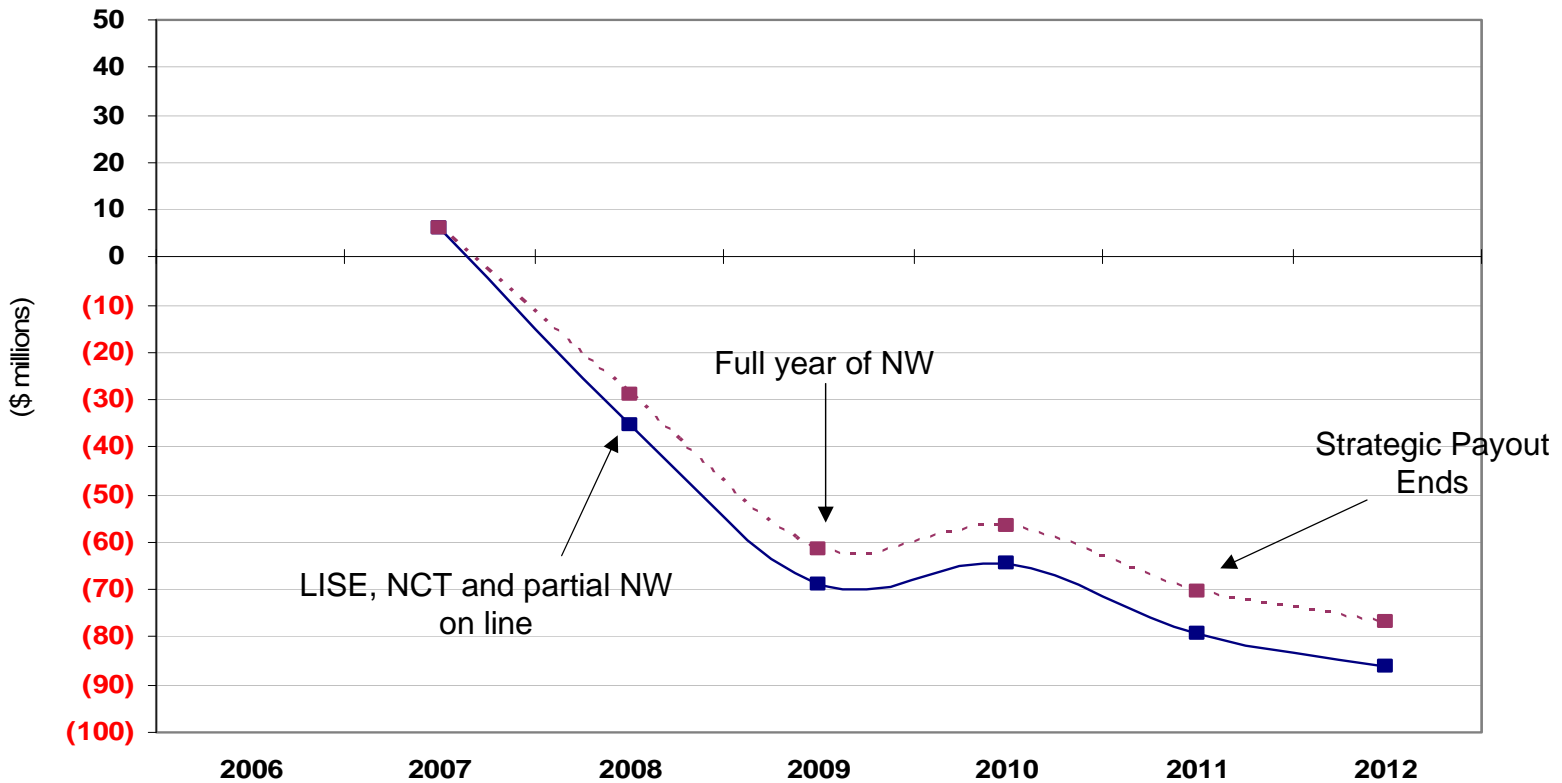
# FY08 Endowment Payout Increase

- The Corporation has decided to raise the FY08 endowment distribution increase as a result of strong investment returns in FY07
- Baseline distribution increase will grow by 6% over the prior year (versus 5% previously announced)
  - Baseline endowment income will grow from \$474.9M to \$479.5M, providing an additional \$4.6M of income across the FAS
  - Revised FY08 income distribution has already been posted to your endowment accounts
- Incremental distribution (or “strategic payout) increase will grow by 8% over the prior year (versus 7% previously announced)
  - Strategic payout will grow from \$58M to \$61.9M, providing \$3.9M of additional income
  - Most of this income provides budget relief to the FAS unrestricted budget



# Impact on Five year Projections

FAS Core Unrestricted: Total Revenues less Total Expenses  
Impact of FY08 Increase Endowment Payout



Excludes transfer of cash reserves to endowment of \$52.5 million in FY07.



**Harvard University**

**Enterprise Budgeting and Planning System Project**

**Catherine Lloyd**

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**FAS Department  
Administrators' Meetings**

October 2007



# Agenda

1

## **Project Background**

Goals and scope

2

## **Present Status**

Vendor Selection & Implementation Proposal Planning

3

## **Questions and Answers**



# Budget Process Review (BPR) Project

**Our Enterprise Budget and Planning System (EBPS) project was initiated in response to the recommendations of a University-wide assessment, known as the BPR project, conducted in the fall of 2006. This BPR project was charged with :**

- Documenting the University's business processes for the annual budgeting cycle as well as for long-range financial planning.
- Identifying "pain points" associated with these business processes.
- Identifying "best practices" within the University and among similarly structured peer institutions.
- Delivering a summary report with both short- and long-term recommendations to improve business processes.

**To compile the following findings and recommendations, the project team interviewed representatives of the following academic and service units:**

- Harvard Business School
- Harvard Graduate School of Design
- Harvard Medical School
- Kennedy School of Government
- Harvard Law School
- Radcliffe Institute for Advanced Study
- Harvard School of Public Health
- Harvard Graduate School of Education
- Harvard Divinity School
- Faculty of Arts and Sciences
- Harvard Real Estate Services
- University Operations Services
- University Information Services
- University Budget Office



# Key BPR Recommendations

Activity	Key Observations	Key Recommendations
Preparation of Budget Templates	Budget template development is the most time-consuming component of the budgeting process and adds the least amount of value.	<p style="text-align: center;"><u>Quick Wins</u></p> <ul style="list-style-type: none"> <li>• Optimize the use of Excel as a budget preparation &amp; consolidation tool by drawing on best practices.</li> <li>• Explore interim technologies at the local level that require few resources but effectively streamline processes.</li> <li>• Provide better training and more comprehensive educational materials both centrally and locally.</li> </ul> <p style="text-align: center;"><u>Longer-Term Solutions</u></p> <ul style="list-style-type: none"> <li>• Reduce the intensity of the budget cycle by adapting requests from UBO in light of a more permanent long-term financial and academic planning process.</li> <li>• <b>Implement enterprise technologies that enable more effective and efficient approaches to strategic financial planning, reporting and analysis.</b></li> </ul>
Local Budget Completion	Budget templates provide depts with a vehicle for budget submission but do not facilitate budget preparation. Depts would appreciate training and context for financial planning, as well as tools and techniques for mapping their more operational plans into the budget format.	
Local Budget Consolidation	Consolidation is overly clerical and time-intensive while adding little value to the budget completion process. Most Schools/Units have little visibility into (and opportunity to influence) the consolidated projection until late in the budget cycle.	
Consolidated Budget Submission	Schools/Units appreciate the emphasis on planning that is necessary to complete the narrative and metrics for the University Budget Office, but would like to see standardization in the types of requests and more automation in the collection of those data points.	
Analyze, Monitor, Report and Forecast	The current standard reports do not allow financial and non-financial data to be gathered and used effectively. Reports fall short for management reporting purposes; when combined with business practices that reduce transparency, senior leadership has limited visibility and/or opportunity to engage proactively.	
Planning and Budgeting Assumptions	The development of assumptions should be an opportunity to engage with tub academic leadership on near- and long-term resource prioritization. Instead, the TFO spends a disproportionate amount of time collecting/aggregating data, leaving less time for strategic discussions.	

**Though important Quick Wins were identified, the BPR Steering Committee considered it essential that, within a two-year horizon, the University undertake a more traditional evaluation of enterprise-wide technology that streamlines our budgeting process and facilitates a more robust approach to financial planning.**



# EBPS Phase I Project Objectives

## *Initial Scope*

- **Replacement of Fiscal Budget Tool is Primary:** The requirements gathering and vendor evaluation/selection will be focused on replacement of Excel and the University Fiscal Budget tool as the primary tools by which the University builds its annual operating budget.

## *Future Objectives*

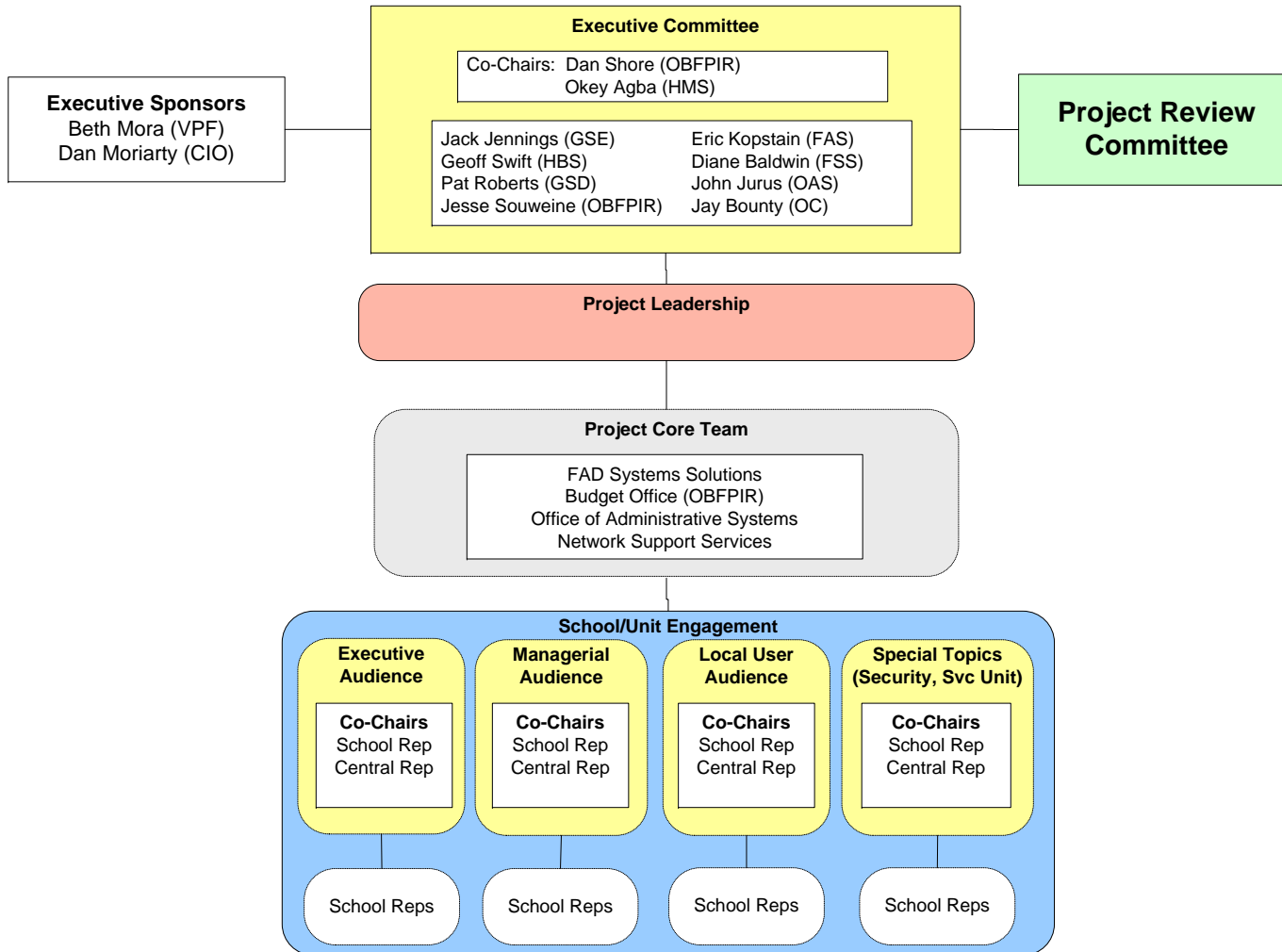
- **Capital Budgeting:** This project will not address requirements for either capital projects budgeting, though an impact assessment on current budgeting processes, along with any requirements for interfaces from or to applications housing the relevant data, will be included in the project deliverables.
- **Long-Range Planning Tools:** While the ability to interface with enterprise long-range financial modeling tools will be considered as part of this project's requirements definition and vendor evaluation/selection, no specific requirements will be documented for long-range planning tools themselves.

## *Not in This Scope*

- **Detail Sponsored Award Budgeting:** This project will not address requirements for detailed sponsored award budgeting, though an impact assessment on current budgeting processes, along with any requirements for interfaces from or to applications housing the relevant data, will be included in the project deliverables. Plans related to the Sponsored Budget Tool are under discussion.

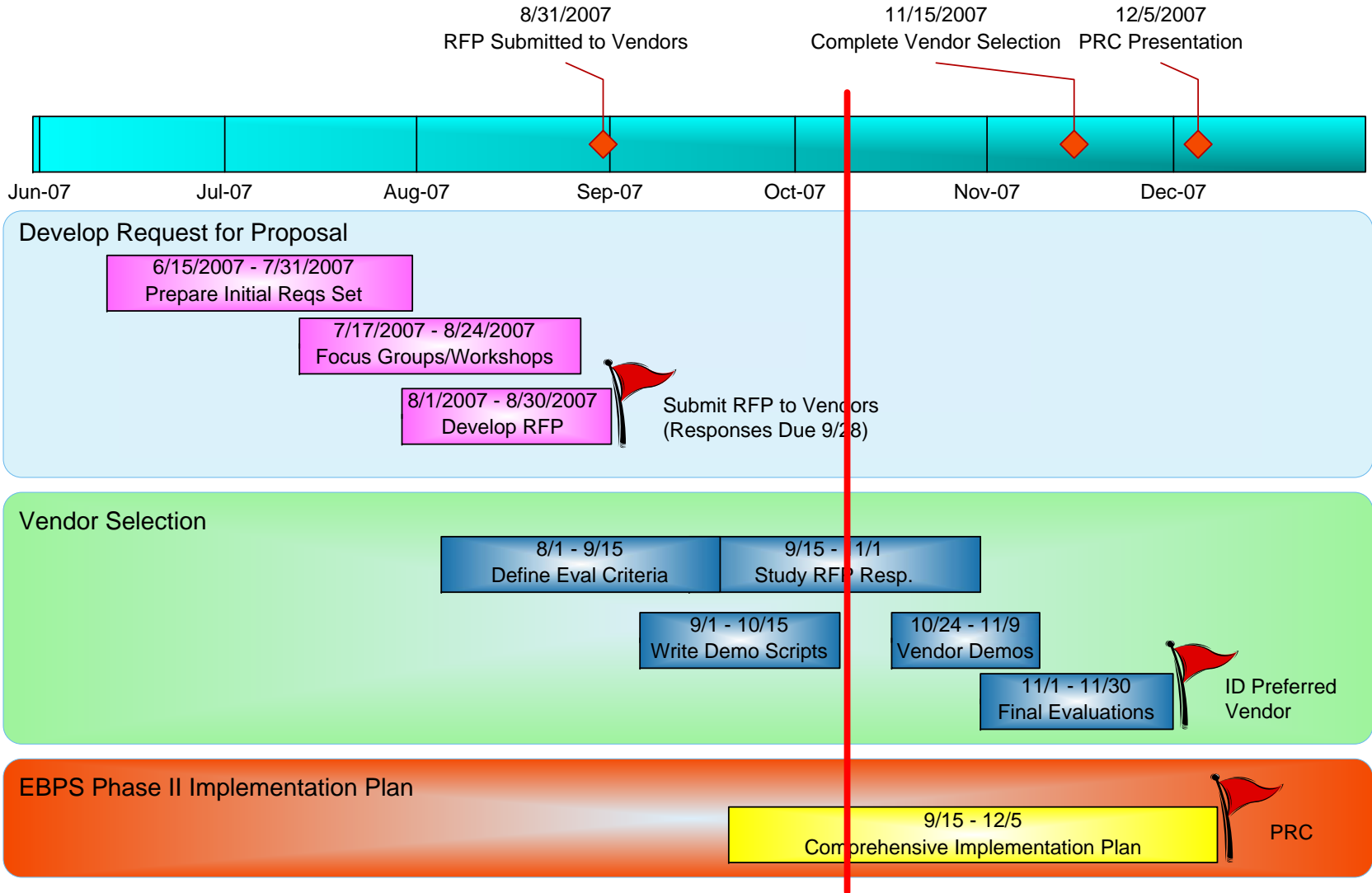


# EBPS Phase I Project Governance





# EBPS Phase I Project Timeline





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# Requirements Definition Phase Complete

- **15** Workshops Held
  - 3 Technical / Integration / Security
  - 3 Managerial Users
  - 3 Tub Leads
  - 2 Executive Users
  - 2 Local Users
  - 1 Service Units
  - 1 University Budget Office
- 68 Distinct Participants from 13 Schools / Units
- Detailed Request for Proposal (RFP) document was issued to the vendors on August 31<sup>st</sup>. Full document available on EBPS website.



# Results of Workshops

## Local Users

- Report on variance across budget or forecast types, and across time periods
- Built-in functionality to allocate annual budget across fiscal periods.
- Flexible forecast versioning and development features, including side-by-side comparisons.
- Ability to create subsidiary schedules & tie them to budget line

- Filter, sort, subtotal & view (forecast, budget, actuals, etc.) by CoA segments or attribute
- Import/upload and export/download (Excel, Access, etc.)
- Insert comments and save them from year to year
- Refresh actuals on a defined schedule
- Tag (assign an attribute) a given budget line (33-digit combination) with additional information above and beyond the accounting string.
- Define alternate aggregations based on any attribute of budget line, including the chart of accounts segment values and all other user-defined attributes.
- Excel-like user interface and functionality.
- Compensation budgeting functionality.
- Flexible assumptions definition tool, including security on which users/roles can override a given assumption or define new ones.
- Drill up or down a data hierarchy
- Secure salary detail data

## Managerial & Executive Users

- Create multiple types and numerous versions of the budget
- Configure the interface or choice of interfaces by security role
- Robust standard reporting features, including the capability to tailor the reports to tub and/or dept specifications.
- User-friendly, responsive
- Quick consolidation features
- Easy to change assumptions (cascade changes up/down)



# Upcoming Tasks: October – November 2007

## Vendor Evaluation & Selection:

- Harvard's requirements were sent to 5 vendors:
  - Business Objects (<http://www.businessobjects.com/>)
  - Cognos (<http://www.cognos.com/>)
  - Oracle/Hyperion ([www.hyperion.com](http://www.hyperion.com))
  - SAP/OutlookSoft ([www.outlooksoft.com](http://www.outlooksoft.com))
  - SAS ([www.sas.com](http://www.sas.com))
- Selected representatives from the budgeting community are currently reviewing and grading the vendors' responses.
- Vendors will conduct on-site demonstrations of their solutions from October 24 – November 9.
- Vendor selection complete by Thanksgiving.



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# Thank you to our FAS Partners!

Name	Affiliation	Project Role
Deena Giancotti	Associate Dean for Finance	Executive Requirements & Vendor Selection
Eric Kopstain	Assistant Dean for Budget	Project Exec Committee. Managerial Requirements & Vendor Selection
Tanya Sukharenko	Financial Analyst	Vendor Selection
Ellen Cohen	Director of Financial Svcs, Harvard College Library	Managerial Requirements & Vendor Selection
Christy Krant	Manager of Financial Operations, Athletics	Managerial Requirements
Catherine Cezeaux	Director of Administration and Finance, Peabody Mus	Local User Requirements & Vendor Selection
Becky Chetham	Director of Administration, OEB	Vendor Selection



# Questions?

## FAS Primary Contacts:

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FAS Central Finance Office  
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...or any one of the FAS EBPS Project representatives.



# More Information Available at EBPS iSite

<http://ebps.fad.harvard.edu/>

The screenshot displays the EBPS iSite homepage. On the left is a vertical navigation menu with the following items: HOME, EXECUTIVE COMMITTEE, PROJECT TEAM, REQUIREMENTS WORKSHOPS, and SITE ADMIN. The main content area is titled "Enterprise Budget & Planning System (EBPS) Project" and contains several boxes:

- ANNOUNCEMENTS**: A box titled "Request for Proposal Issued to Vendors" with a text paragraph: "Thanks to the efforts of the nearly 70 participants attending 15 Requirements Workshops over the summer, on Friday, August 31, 2007, the EBPS Project team issued a formal Request for Proposal (RFP) document to 5 market leaders offering robust enterprise budgeting & planning suites. The actual document and its appendices can be found on the EBPS iSite homepage below in the Request for Proposal (RFP) box."
- ABOUT THIS WEBSITE**: A box with a text paragraph: "Welcome. This website is designed to provide information to executive sponsors, project leadership, project team members and University stakeholders about a Harvard project to improve its enterprise budget systems."
- PHASE 1 (DISCOVERY) - MISSION**: A box titled "PHASE 1 (DISCOVERY) - MISSION" with the text "Working with key University stakeholders:" followed by a bulleted list:
  - document a common set of requirements for an enhanced enterprise budgeting application;
  - evaluate and identify a software vendor; and,
  - submit a comprehensive, phased implementation proposal for an enterprise budget application for approval by senior University leadership.
- PHASE 1 (DISCOVERY) - PROJECT SCOPE AND GOVERNANCE**: A box containing two links: "Project Scope and Governance" and "Project Calendar".
- REQUEST FOR PROPOSAL (RFP)**: A box containing a list of links: "EBPS Request for Proposal", "EBPS RFP Appendix C - Functional Reqs", "EBPS RFP Appendix D - Professional Svcs", "EBPS RFP Appendix E - Technical Reqs", "EBPS RFP Appendix F - Pricing Sched", "E-Mails to Vendors", and "Answers to RFP Vendor Questions".



# FY 2009 Budget Process Update

**Nissa Knight**



# Annual Budget Process Highlights

- A significant change was introduced to the budget process last year
  - The deadline for detailed budget submissions was moved up to late February
  - The goal was to submit a more accurate and complete budget to the Corporation in March
- The change was quite successful
  - The majority of FAS units met the deadlines of the new budget calendar
  - The entire FAS budget was submitted in detail in the spring
- The FY 2009 budget process will follow the same calendar as last year
- We look forward to another successful year and welcome any suggestions that might help improve the process



# High Level Calendar View

	November	December	January	February	March
FAS Financial Office shares Central Budget Letter with Tubs	End of November				
FY 2009 Budget Process Detail Discussed at Dept Admin Meetings		Early December			
Unrestricted Budget Targets Issued to Departments & Tubs			15-Jan-2008		
FY 2009 Budget Guidelines Issued to Departments and Tubs			15-Jan-2008		
Budget Tool Tips Sent to Department Administrators			15-Jan-2008		
Budget Tool Training with ASAP			EXACT DATES TBD		
Departments & Tubs Prepare 33-Digit Budget Detail for FY 2009			January 15 - February 29		
Deadline for Departments & Tubs to complete 33-digit Budget Detail for FY 2009				29-Feb-2008	
FAS Financial Office reviews Departmental Budget Submissions					March, 2008
FY 2009 FAS Consolidated Budget Submitted to Corporation					30-Mar-2008



# Overview of Due Dates & Deliverables

NO SIGNIFICANT CHANGES FROM LAST YEAR!

## December

- Detailed discussion of FY 2009 Budget Process with FAS Administrators at DA Meetings
- Solicit feedback from a selection of FAS Administrators on the proposed FY 2009 Departmental Budget letter content and details

## Early January

- Budget Letter and Overview Materials Distributed
- Budget Targets Distributed and Entered into Budget Tool
- Quick Tips on Budget Tool Distributed to Administrators
- Endowment Distribution & AEA entered into Budget Tool

## January/February

- Budget entry into system
- Budget Tool Trainings and Clinics offered by ASAP (dates tbd)
- Check-In by FAS Financial Office with Department Administrators on Status

## February 29

- Due Date for Completion of All Funds Budget for FY 2009
- The deadline is FAS-wide. However, if your Department/Centers faces special or extraordinary conditions, please notify your analyst and we will determine a workable game plan.



# Funding Vacation Payouts and the Historical Liability

**Carolyn MacLeod**



# Process for Vacation Payouts and Transfers

- Two types of vacation time – Regular & Longer Service
- Process differs depending upon which type & whether a Termination or Transfer
  - **Regular Vacation Time Payout**
    - **Termination/Retirement** :
      - Same process as before Absence Management
        - Submit termination paperwork through ASPerIN; include vacation balance from employee “Absence Balance” report in PeopleSoft
        - Payout will be charged to VAO – Vacation Payout earnings code
      - Reimbursed by vacation fringe pool but may trigger funding of historical liability\*
    - **Transfer to another HU Department** :
      - No longer to be journaled to the new department or tub
      - May trigger funding of the historical liability\*

\*To be reviewed in more detail later in presentation



# Process for Vacation Payouts and Transfers

## ▪ Longer Service Time Payout

### • Termination/retirement:

- Same process as before Absence Management

- ***Note - you must enter balance to be paid in “Longer Service Hours” in ASPerIN. Do not combine with the regular vacation balance.***

- Payout will be charged to LSO – Longer Service Vacation Payout earnings code.

- Not paid through the fringe pool - when an employee leaves, the payout will be charged to your department.

### • Transfer to another HU Department:

- The value of the Longer Service time must to be journaled to new department, using the regular earnings object code (6050/6070).



# Vacation Payouts - Related Object Codes

- **Regular Vacation payout:**
  - **Salary Portion (debit):**
    - 6205 (*Exempt Vac Payout^Nonpensionable Extra Comp*) for exempts
    - 6207 (*Nonexempt Vac Payout^Nonpensionable Extra Comp*) for nonexempts
  - **The related fringe (debit):**
    - 6321 (*Nonpensionable Extra Comp Fringe Assessment*) for both exempts and nonexempts
  - **The reimbursement from the Vacation Bank (credits):**
    - 6206 (*Exempt Vac Payout Reimbrsmt^Nonpensionable Extra Comp*) for exempts
    - 6208 (*Nonexempt Vac Payout Reimbrsmt^Nonpensionable Extra Comp*) for nonexempts
    - 6323 (*Nonpen Extra Comp Vac Payout Fringe Reimbrsmt*) for the fringe on the payout (both exempts and nonexempts)
  - Net effect of zero on department budget
- **Longer Service Payout:**
  - 6203 (*Nonpensionable Severance&Vac Payout^Nonpensionable Extra Comp*) for both exempts and nonexempts
  - 6321 (*Nonpensionable Extra Comp Fringe Assessment*) for fringe



# Historical Liability Funding Timeline and Process

- Historical Liability only exists for employees with vacation balances on June 30, 2007
- First round of funding for employees with triggering events\* through September 30 will be coming to you soon:
  - We will send you a spreadsheet that includes:
    - A list of employees for whom funding is required
    - The calculated amount of their liability
    - The coding associated with them
  - What we need you to do:
    - Confirm the coding or give us new coding if the person was on sponsored coding. **Note: the historical liability may not be charged to any sponsored funding, federal or nonfederal.**
    - Let us know (1) if anyone should not be on the list and (2) for whom you think calculated liability is incorrect.
  - When: Spreadsheets in mid-October and due back early November
  - Going forward, the process will occur on a quarterly basis

\*Termination of employment, retirement, change in HR Department code (including transfers), or change in employee class (from nonexempt to exempt, or vice versa) are the triggering events



# Historical Liability Funding

## How Is it Calculated?

- John Doe, a non-exempt employee, had 35 hours of regular vacation time at 6/30/07. He was paid \$30.00/hour at 6/30/07 but got a raise to \$31.00 as of 7/1/07. John Doe leaves Harvard on 7/31/07.
- The historical liability is calculated as follows:
  - 6/30 regular vacation balance in hours x rate of pay *at time of triggering event* = salary charge
  - Add fringe at the *regular* fringe rate (for change in employee class, it's the rate of the old class)
  - John Doe's calculation: 35 hours x \$31.00 = \$1,085 + \$458.96 (\$1,085 x 42.3%) = \$1,543.96 total historical liability to be funded



# Historical Liability Funding Related Object Codes

- The salary portion (debit):
  - 6055 (*Exempt Staff Vacation Salaries Historical Funding Chrg*) for exempts
  - 6075 (*Cler/Tech Nonexempt Vacation Salaries Historical Funding Chrg*) for nonexempts
- The related fringe (debit):
  - 6275 (*Exempt Staff Vacation Fringe Historical Funding Chg*) for exempts
  - 6285 (*Clerical/Tech Nonexempt Vacation Fringe Historical Funding Chg*) for nonexempts



# **FAS Revised Spending Policy for Travel, Business Meals and Entertainment**

**Carolyn MacLeod**



# Revised Spending Policy

- Last summer, we convened a committee of administrators to review the Spending Policy for Travel, Business Meals and Entertainment
- Committee was comprised of a selection of 14 administrators from tubs, academic departments, and research centers
- The purpose of the Committee was to:
  - ✓ Discuss local issues faced with current policy and procedures
  - ✓ Review existing FAS Guidelines and make recommendations for improvement
  - ✓ Provide feedback to FAS Financial Office on new FAS policies and procedures



# Revised Spending Policy

## Major changes to the policy include:

- ✓ Lodging rules/ options have been simplified and clarifications made in areas such as lodging per diems, staying at private residences
- ✓ Dinner, lunch, and reception spending limits increased
- ✓ Pre-approval of spending for large receptions and events
- ✓ Clarified areas of confusion (e.g., lowest available airfare)
- ✓ FAS policy updated to incorporate requirements & exception procedures for federally funded travel (Office of Sponsored Programs Policy)
- ✓ New policy format / defines roles and responsibilities (All policies to be reissued in consistent format)



# Airfare

## **Policies for air travel have not changed**

- ✓ Clarifies what is meant by “lowest available airfare” by providing criteria for selecting flight
  - Airport of choice
  - Desired time of travel
  - Non-stop flight if possible (circuitous routing and stopovers not required)
  
- ✓ Incorporates requirement that airline tickets funded by Federal Awards must be purchased using preferred travel agency



# Lodging

- ✓ Lodging Options are simplified
  - Travelers may choose Harvard preferred hotel, Corporate Travel Index, or Federal Per Diem Rate
  - Exception approval required when rates exceed 40% of Corporate Travel Index or Federal Per Diem Rate
- ✓ Basic Requirements Remain Unchanged
  - Non-Luxury Hotel (4 Stars or Less)
  - Standard Room
  - Location / Safety/ Amenities
- ✓ Use of Per Diems Clarified
  - Lodging per diems should be used only in special circumstances where receipts difficult to obtain (some foreign countries)
- ✓ Staying at Private Residences
  - Gifts of appreciation limited to \$75 per visit or meal per spending policy



# Meals – Travel, Business, and Entertainment

- ✓ Increased spending limits on meals and *include taxes and tip*
  - Lunch – up to \$45 per person
  - Dinner – up to \$100 per person
  
- ✓ Receptions spending
  - Limit increased to \$35 per person (food and beverages only)
  - Events exceeding \$5,000 in total must be approved in advance by FAS Office of Finance
  
- ✓ Defined Repetitive Food & Travel Expenses per IRS Regulations
  - Inappropriate to charge regular lunches, coffee breaks, etc.
  
- ✓ Spousal & Family Travel and Meals
  - Normally reportable income and taxable per IRS regulations
  - Requires FAS finance office prior approval



# Transportation

## ✓ Zip Car Accounts

- May be used for documented University business
- Must not be used by students
- New accounts require prior approval from FAS Finance Office
- Business purpose precluding use of public transportation/ savings
- Name(s) of employees using service
- Procedures for monitoring and approving trips

## ✓ Rail Service

- Business Class allowed on routes from Boston to New York City and Boston to Washington, DC



# Other Additions to Policy Document

- ✓ Expanded Car Rental Information (University Policy)
- ✓ Personal Car Usage (University Policy)
- ✓ Information on How to Calculate Mileage (University / IRS Policy)
- ✓ Emergency Travel Assistance Program Information (SOS)
- ✓ Quick Reference Guides & Helpful Tools
  - Guide for Air Travel
  - Guide for Lodging
  - Business Purpose for Meals – Examples of the 5 W's
  - Informational Letter for Incoming Visitors



# FAS Training News

**Carolyn MacLeod**



# FAS Training News

- Enhanced Financial Management
- International Office Informational Training
- FAS Finance Fundamentals Pilot Program
- Travel and Reimbursement Brown Bag



# Highlights of the 2007-2010 HU/HUCTW Contract

**Product of  
Interest-Based  
Bargaining**

**Chris Kruegler**



# Wage Increases

Date	Total	Progression Structure		Ranges (Min/Max)
7/01/2007	4.8%	2.2%	2.6%	3.5% / 4.5%
7/01/2008	4.4%	2.2%	2.2%	3.5% / 4.0%
7/01/2009	4.4%	2.2%	2.2%	3.5% / 4.0%

**Shift Differential:** Rates for HUCTW staff with regularly scheduled hours on weekends, nights, and evenings were adjusted for cost-of-living as follows.

Previous contract:	\$1.10/hr.
7/01/2007	\$1.25/hr.
7/01/2008	\$1.30/hr.
7/01/2009	\$1.35/hr.



# Benefits

- Tuition Assistance Program
  1. Employees eligible for all TAP benefits after completion of O&R period
  2. Non-Harvard courses now reimbursed at 90% of cost up to \$5,250
  3. TAP now covers certificate and licensing programs
- HUCTW Education Fund increased in each year by approx 5%
- Child Care Fellowships fund increased from \$525,000 to \$1,150,000 (pre-tax delivery being established)
- The parties agreed in principle to establish a program to allow all staff with at least ten years of service to roll over the value of a limited number of vacation days into a Tax Deferred Annuity account. Eligible staff would have this opportunity at five-year intervals.
- The parties agreed in principle to adjust the income tiers for health insurance premiums for cost-of-living



# Housing and Transportation

- Expanded the no-interest Rental Housing Transition Loan program to cover moving expenses for home owners and housing hardship situations. Loans are still through the Credit Union and are repaid through payroll deductions (\$2,500 for rental housing transition; \$1,000 for home owner moving expenses, \$2,500 for housing hardship).
- Created new Transportation Fund of \$30,000 to provide assistance to staff with extremely high commuting costs, including Longwood Area parking, private commuter bus lines, and parking in MBTA garages.



# Joint Governance

- New Joint Governance Coordinating Committee created
- Joint Activity and Training Fund increased
- New Joint “Pair” will assess and make recommendations regarding training opportunities extant



# Paid Time Off Update

**Mary Straub**

FAS Human Resources



# Paid Time Off Update

## September 2007:

- Release 18: fixes
- June 30 balance lockdown

## Future Plans:

- Releases 19 and 20: fixes and enhancements
- Reporting

## Tips:

- Enhancement Requests ([helpdesk@harvard.edu](mailto:helpdesk@harvard.edu))
- Partial day reporting



# Pre-Employment Screening

**Mary Straub**

FAS Human Resources



# Pre-Employment Screening

- To further promote the safety and security of the Harvard community, to minimize the potential risk of loss, and to promote uniformity in the hiring and screening process, the University will now require certain types of pre-employment screening.
- FAS will begin pre-employment screening as part of the hiring process using a phased approach over the next six months.
- Departments will be contacted as the process moves forward. More information to follow.
- If you have questions please contact Laurie Giannaros at X52730 or Gretchen Harrison at X55787.



# Performance Management Update

**Mary Straub**

FAS Human Resources



# Performance Management Update

- Every department should be on a cycle for annual reviews
- Reviews should be recorded timely in ASPerIN
- All performance reviews need to be completed before a department can use its FY08 bonus pool funds