

**Personnel, Payroll, and Employee Benefits
(Office of Finance and Administration)
Unit Annual Report
2002-03**

Personnel

Gary Strei – Senior Administrative Director for Finance and Administration

Sarah Mattson – Director of Human Resources

Randee Hokanson - Relocation Coordinator (20% time)

Mary Zosel - Payroll Coordinator

Jenny Quam – Senior Office Specialist

Amy Zagaros - Student Worker, academic year

Malinda Bergland - Student Worker, academic year

Purpose

The Office of Human Resources works in partnership with faculty and staff to ensure that the relationship between the University of Minnesota, Morris and its employees is respectful, fair and consistently supportive of the overall mission of the University.

Function

Human Resources/Benefits

1. To direct the human resource function at UMM. Liaison to U of M Office of Human Resources; serve as HR Pro. Administer and monitor policy and procedure, including union contracts and work agreements. Direct and monitor Academic Search Process and civil service and bargaining unit hiring. Assist with problem resolution
2. To direct the employee benefits function at UMM. Liaison to the U of M Office of Employee Benefits; serve as Designated Employee Benefits Contact Person (DEBCP). Assist all academic, Civil service, and bargaining unit staff on fringe benefit enrollment and participation. Facilitate Open Enrollment at UMM.
3. To direct the equal opportunity and affirmative action function at UMM. Serve as designated UMM liaison to the U of M Office of Equal Opportunity and Affirmative Action. Monitor and administer related policy, including sexual/racial harassment/discrimination.
4. To direct service and management training and employee development programs at UMM.
5. To direct the relocation function at UMM. Assist new faculty/staff with relocation to UMM community and offer assistance in finding opportunities for spouses/partners.

Payroll

1. To manage the payroll process at UMM. Liaison to the U of M Central Payroll Office; serve as designated Payroll Key Contact and Ace. Process all faculty and staff payroll and HR forms, process payroll. Assist with audit and management of payroll and fringe benefit budgets.
2. To maintain civil service and bargaining unit payroll files and vacation and sick leave records.
3. To manage the worker's compensation reporting process at UMM. Serve as UMM liaison to the U of M Office of Worker's Compensation. Monitor and administer related policy and activity.

Evaluation: Human Resources

The UMM Human Resource Office, including responsibility for equal opportunity has seen a dramatic increase in activity since it began in 1995. Much of this activity is a result of increased hiring, training and information at UMM. Our work with the web has allowed us to make human resource information easily accessible. Monthly meetings like the Meet and Confer with Teamster representatives and Labor Management Committee, the addition and development of the Relocation Coordinator position, and performance appraisal systems continue to be very effective.

This year the State of Minnesota imposed historic reductions in the University's budget. As a result, each area of the University was required to establish plans for reducing the operating costs of their area significantly. Chancellor Schuman assigned this task for UMM to a Budget Task Force. The Budget Task Force came up with a list of suggested reductions for the campus which included cutting administrative and overhead costs, resulting in reduced appointment percentages and lay offs. Reductions imposed by central administration will be increased health care costs and retirement incentive options.

Summary of significant issues for the past year:

The following summary of employee hiring and turnover during this past academic year does not include temporary and casual appointments. Hourly employees and those employees whose appointments are less than 25% time will not be included.

- **New Hires** – *regular appointments of 25% or more*

<u>Unit</u>	<u>Total Hires</u>	<u>New Positions</u>	<u>Part time / Full time</u>		<u>Internal / External</u>	
AFSCME	5	0	1	4	3	2
Teamster	6	4	2	4	4	2
Law Enforcement	1	0	0	1	0	1
Civil Service	0	0	0	0	0	0
Faculty*	25	2	2	23	1	24
P & A	15	2	8	7	4	11
Grand Total	52	8	13	39	12	40

*Additionally, there were four sabbatical replacements this academic year.

- **Terminations/Retirements** – *regular appointments of 25% or more*

<u>Unit</u>	<u>Retirement</u>	<u>Termination/Transfer</u>	<u>Layoff/Non Renewal</u>	<u>Total</u>
AFSCME	1	4	0	5
Teamster	0	1	2	3
Law Enforcement	0	0	0	0
Civil Service	1	1	0	2
Faculty	2	15	0	17
P & A	0	16	0	16
Grand Total	4	38	2	43

Job Evaluation Questionnaires:

<u>Unit</u>	<u># submitted</u>	<u># resulting in reclass</u>	<u># pending</u>
Civil Service	2	2	0
AFSCME	3	3	0
Teamster	0	0	0
Grand Total	5	5	0

Total increase in salary dollars as a result of higher reclassifications = \$11,428.

- **Supervisor Training**

- Compensatory Time Reporting
- MN Data Practices Act/Records Retention
- Performance Appraisals for Civil Service and Bargaining Unit Staff
- Family and Medical Leave Act
- Managing Human Resources during Challenging Times

- **Employee Programming**

- Labor Management Team monthly meetings / LMT Luncheon
- Teamster Meet and Confer monthly meetings
- FISH! Philosophy quality service training (Dining Services)
- Office of Residential Life, participated in Resident Advisor's Training
- Maintaining Personal Stability during Challenging Times
- USA Meetings
- Work/Life Focus groups
- Clerical Classification Study
- Anniversary greetings/gift for employees; card and beverage from Turtle Mountain Cafe
- Complementary U of M name tag for all new employees hired at 75% or greater

- **Relocation**

Relocation Program - the Relocation Coordinator at UMM has established this position as an excellent resource for those people moving to our community. The information and support provided has benefited numerous spouses and partners of UMM faculty and staff. Unfortunately, the relocation position fell victim to the budget reductions and found the time reduced from 20% to 10% for the year. As a result, Randee Hokanson resigned this position at the end of the academic year. The responsibility for relocation assistance will remain in the Office of Human Resources, with support from the division or department offices.

Equal Opportunity

The U of M Equal Opportunity Office booklet contains information about policy and procedure at the University. This booklet has been distributed to all employees and given to each new employee as they are hired. The UMM Equal Opportunity Office has prepared a brochure to accompany that booklet as a quick reference for UMM faculty, staff and students. Residence Hall Directors and Advisors received training about responding to, and reporting claims of discrimination, including harassment. The Equal Opportunity Officer is available to provide training to the UMM community. During this academic year, there were 23 reports of discrimination, including harassment, that were reported to the Equal Opportunity Office. Reports of assault were forwarded to Campus Police.

Evaluation: Employee Benefits

The UMM Benefit Office maintains its designation as UMM Designated Employee Benefit Contact Person (DEBCP) and will continue to arrange for UM Employee Benefit Representatives to visit the campus three times each year. All employees are offered the opportunity to meet with a representative at their request. The fall Open Enrollment meetings help employees determine which benefit changes they need or want to make in their employee benefit plans. Other training opportunities have been provided as indicated below.

Summary of significant issues for the past year:

- **Benefits as a percentage of fulltime salary for 02-03:**

Civil Service	30.90%
Academic	34.10%

- **Retirement Incentive Options**
 - Faculty 2 elections effective in 2003, 2 elections effective in 2004
 - P & A 0 elections effective in 2003, 1 election effective in 2004
 - Civil Service 0 elections effective in 2003, 1 election effective in 2004
 - Not available to bargaining unit staff until negotiated

- **Training**
 - Open Enrollment Meeting
 - Employee Benefits Counselor Meetings, Fall/Winter/Spring
 - Pre-Retirement Seminar for Faculty and P & A Staff
 - Optional Retirement Plan Informational Meetings
 - Employee Forums: Proposed changes for 2003 UPlan
 - Retirement Incentive Program information for affected employees

Evaluation: Payroll Services

Payroll has transitioned to the PeopleSoft system. Payroll costs continue to claim 73% of the UMM budget. Gross state-funded payroll costs for UMM during the 2002-03 year were approximately \$18,553,451 (salary + fringe).

Major changes recommended/Plans for 2002-03

- Budget reductions will require careful consideration of each hire or reclassification at UMM. Each hire or reclassification will be presented to the Chancellor and Vice Chancellor's group for approval, prior to the commencement of a search or assignment of new tasks. Quarterly updates of leave accrual, including compensatory time will be provided to the Chancellor and Vice Chancellors.
- Quality Service Training- The quality service mission of the University of Minnesota will continue at UMM.
- Supervisory Training Opportunities - Human Resources sees supervisory training, support and networking as areas to continue to focus great energy on in this coming year. Opportunities for discussion will continue to happen 2-3 times each academic year.
- Equal Opportunity and Affirmative Action - information is key to a good understanding of our organization's responsibility to equal opportunity. The new brochure to be a source of information for faculty, staff and students with regard to issues of discrimination.
- Retention - salary, benefits and training are important elements to our employee's satisfaction at work. We need to add "a sense of loyalty" to that list. So while we are selling our recruits on the opportunity to work at UMM, we need to re-sell our current faculty and staff. We should again consider the marketing strategies UMM is using in Admissions and Financial Aid or External Relations and use them to campaign to our current faculty and staff, and encourage and support them in playing a role in the University's success.
- The UMM Human Resource Office will assume the responsibilities of the Relocation Coordinator following the resignation of the Relocation Coordinator in June '03. We will work to provide information in the most efficient process possible and in conjunction with support and contributions of the hiring departments.
- The UMM Human Resource Office will assume responsibility for the UMM Wellness Program, as designated by the U of M Wellness Program.
- The UMM Human Resource Office will assume responsibility for the UMM Work/Life Program as designate by the U of M Work/Life Program.