The Office of Budgets and Personnel (OBP) provides operational and strategic financial and human resource expertise to the Division of Student Life, which comprises 15 units with distinct revenue sources and business needs. Key services provided by OBP include accounts payable and receivable; payroll, time and absence administration; PCard and cash reconciliation; departmental deposits; travel and expense reimbursement processing; coordinating the hiring process for new employees and student-workers from posting to onboarding; PCI compliance; budget management and financial planning; employee relations, performance management, compensation and classification consulting. A snapshot of services provided by the OBP team in FY18 include:

- created 351 purchase orders totaling over $3M
- reviewed and reconciled 1,036 PCard and employee expense reports totaling $458M
- identified and corrected 47 errors in 88 travel reimbursements
- processed 667 departmental deposits and 237 internal sales vouchers
- executed 69 step increases, 36 stability payments and 44 lump sum payments
- monitored 1,350 Commuter Meal program transactions and $773,550 in collections
- performed 100 journal entries
- managed recruiting and onboarding for 33 new employees and 540 student-workers
- leveraged $279,800 work-study dollars to supplement cost of 187 student-worker wages
- implemented new timekeeping system and coordinated trainings for staff and supervisors in Dining Services and Facilities Management
- developed tailored civility in the workplace training for an SL department

The OBP team upholds the core value of continuous improvement and possesses a shared orientation toward recognizing opportunity inherent in change, which enables us to go beyond merely weathering change, but embracing it enthusiastically. This perspective is the team’s greatest strength and forms the foundation for successful progress in advancing our goals and meeting our annual objectives.

In FY17 the OBP team practiced transitional resilience by responding and adapting to change with agility. In FY18, however, we made change. In select service areas, we effectively executed a proactive pivot away from responding toward initiating, from reacting to anticipating.
executive summary 2.0

what we did

evaluated & analyzed
challenged status quo
attended, coordinated & developed trainings
redistributed responsibilities

developed shared resources
stopped doing some things
implemented process improvements
enhanced efficiencies
built partnerships
expanded services
leveraged resources & opportunities

This pivot required taking a step back to observe the service landscape, reevaluate the purpose and value of the services we provide, and determine if they should be done differently- or at all- going forward. In a team culture where above, beyond and post-haste is the norm, allowing this pause and deciding to discontinue some practices was challenging at first, but the team realized that taking on more without letting some things go undermines success. That in order to do new and better things, we had to stop doing others.

Ultimately, we learned that practicing a more intentional, proactive approach, setting and enforcing parameters makes us more effective and efficient both at the team and individual level, which empowers us to provide higher quality value-add services to our customers.

learnings & strategic actions

* awareness emerged that team members spent an abundant amount of time each week responding to thematic payroll and absence-related inquiries, which prompted the development of a list of FAQs supervisors can reference to answer common questions. In Google Doc format, this dynamic shared resource enables consistent knowledge, communication and application of processes and allows for frequent content updates as new information and scenarios arise

* in acknowledgement that time is our scarcest resource, the OBP team implemented our FY18 objective to streamline the student hiring process by facilitating group onboarding sessions for student-workers, which has paid dividends in time management and productivity in addition to providing new development opportunities and cross-training for team members

* recognizing that the employee hiring process was disjointed with multiple points of contact, we established primary responsibility for posting job openings, managing the recruitment system, requesting background checks, and meeting with new employees to complete required paperwork, resulting in a more seamless experience for hiring managers

* we collectively identified a missed opportunity to fully leverage Google functionality so we participated in a team training and challenged ourselves by applying our newfound knowledge of using collaboration tools to compile data, ask and answer questions for this report!

* employee engagement survey results unanimously confirmed an effective environment of teamwork and cooperation based on trust, respect, and a shared drive to provide stellar service to our stakeholders. In addition, we’ve established a culture in which innovation is encouraged, expectations are clear, and OBP and Student Life goals and objectives are understood. As a team, we will determine ongoing ways to celebrate and maintain our strengths
guiding principles

mission

the Office of Budgets & Personnel supports the Division's mission by providing a conduit to the financial and HR resources necessary for Student Life staff to meet the needs of students.

vision

providing creative solutions and expertise to financial and personnel complexities

values

• student centered – we place students at the heart of all we do

excellence/high quality service – we provide high quality service and programs developed with creativity, innovation and a commitment to continuous improvement

• inclusiveness – we respect and celebrate the diversity of individuals, perspectives and ideas while promoting social justice

• learning – we support the engagement of students in opportunities that promote and support their growth, development and well-being

• collaboration – we foster partnerships and build community

• sustainability – we contribute toward a sustainable future and model sustainable practices

motto

“we get things done and make work fun!”
FY18 objectives

**goals**

**stellar service** –
provide expert human and financial resource support for Student Life programs in recognition that together we build a community that fosters the intellectual, emotional, cultural and physical development of our students

**maximize relationships** –
develop and sustain collaborative relationships within Student Life and beyond that improve the overall effectiveness of the processes leveraged to provide stellar service

**drive change** –
promote a shared sense of purpose, identifying opportunities for shared services that will result in increased efficiency, productivity and, ultimately, cost savings. advance wellness, diversity, and inclusion as we provide stellar service

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1. implement new payroll system- Kronos- for Dining Services
   - continue to assess functionality, working with payroll experts from Kronos and the Twin Cities and make system adjustments as needed
   - develop and deliver tailored group and individual hands-on trainings for Dining Services staff and supervisors on Kronos and swipe functionality
   
   **status: complete**

2. finalize development of comprehensive onboarding program and resources for new Student Life employees
   - incorporate activities of the Student Life Welcome Team

   **status: in progress**

3. evaluate dollar threshold required to research Freedom Pay credit card transaction history to reconcile imbalances

   **status: complete**

4. build content for OBP page on Student Life website
   - develop timeline of annual busy seasons and deadlines
   - revamp internal resource directory categorized by subject versus expert

   **status: in progress**

5. continue to redistribute responsibilities in alignment with roles and capacity
   - enhance transparency and knowledge-sharing within OBP to provide internal development opportunities
   - document processes and procedures for future transitions

   **status: ongoing**

6. streamline hiring process for student-workers; facilitate group onboarding

   **status: complete**

7. partner with Student Life leadership to identify and implement proactive internal human resource and financial process improvements
   - explore opportunities to adopt a shared services model

   **status: complete**
successes

team stats

8 award nominations

1 award winner

1 ILD graduate

94 total years at UMD

100% participation in Goal 2 learning opportunities

100% engagement survey participation

100% commitment & dedication

kronos –
collaborated extensively with UMD and Twin Cities payroll experts, Dining Services and Facilities Management (FM) leadership throughout implementation of the new time-keeping system. A brief chronology of the phases of this multi-year endeavor includes:

- student-worker pay rule development
- teamster pay rule design
- impact analysis working sessions
- testing environment configuration
- student-worker test group swiping in Kronos
- civil service and labor-represented test group assignment
- testing updates
- additional time clock installation
- time and labor communication plan for Dining employees
- system functionality training for supervisors and staff
- parallel system testing
- go live for civil service and labor-represented groups

Learnings from the Dining student-worker pilot in January 2018 provided ample opportunities to resolve unanticipated issues prior to rolling out to Dining and FM staff in June 2018, resulting in a smoother transition. In addition, the OBP project team:

- participated in 62 hours of time and labor meetings and 33 hours of system testing
- entered and approved time in secondary system for 75 Dining staff for entire year
- coordinated and attended 64 hours of formal training
- continues to provide one-on-one system support to supervisors and employees
- was praised by project partners for their flexibility, agility and cooperation

Reception has been mixed, but positive overall; some quirks and system limitations remain and efforts are underway to overcome them. Without doubt, the success of this project is attributable entirely to the conscientiousness and dedication of the project team!

commuter meals –
removed 1% and 10% charge options in register system, eliminating frequent mistakes and time spent daily reviewing 700 receipts, finding and correcting the errors and obtaining supervisor signature to authorize the adjustments

champ’s closet –
partnered with Career and Internship Services to promote Champ’s Closet, which provides business attire at no cost to students, at Dress for Success event with 300 students in attendance and experienced an uptick in clientele the following semester:

- in fall 2017, Champ’s Closet received 22 clients compared to 38 in spring 2018 for an annual total of 60 clients and 162 garments provisioned

student-worker onboarding –
streamlined student-worker hiring process by facilitating group onboarding, encouraging appointment sign-up, and implementing a fixed schedule of availability to assist walk-ins

freedom pay –
updated terminals and enhanced training greatly reduced credit card transaction errors, preventing double charges and minimizing time spent investigating and resolving them, as well as undercharges and associated revenue loss
Kronos Implementation
Duluth Pilot Phase

Business Team
- Develop Project Plan and Scope
- Develop Communication Plan
- Define Project Timeline
- Kick Off

Technical Team
- Identify Team
- Identify Tech Needs

Vision/Plan
- Develop Prototype
- Requirements and System Config

Design
- Functional Specifications
- Technical Specifications

Build
- Server Configuration
- Unit Testing
- UAT Testing

Implement
- Duluth Dining Services
- Duluth FM Onboard
- Onboard Remaining DS Employees
- Student Side by Side Testing (min 2 pay cycles)