### Committee Name

<table>
<thead>
<tr>
<th>Committee Name</th>
<th>Overall Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Life-Cycle</td>
<td>The purpose of the employee life-cycle subcommittee is to look at processes related to employees, from the recruitment process, through the payroll process, the promotion process, the distribution of salaries, through to retirement. Because so many issues fall within this committee’s realm, the work will be phased. The first phase will focus exclusively on payroll encumbrances and retro distribution changes. Subsequent phases will be defined as work and staffing levels permit.</td>
</tr>
<tr>
<td>Infrastructure (iStructure)</td>
<td>Look at infrastructure issues related to our process and Peoplesoft implementation. The group will have two primary areas of focus: the chart of accounts and PeopleSoft security. In the case of the chart of accounts, the group should consider ways to standardize use of the chart of accounts, to facilitate its use (considering tools and techniques to make the chart string easier to use as well as considering whether the chart string should be changed in any way), and to manage the appropriate introduction of new values. In its security focus, the group should look at ways of standardizing our security roles (including looking at any associated HR setup or processes that may need to change in support) as well as recommend associated security policies and procedures.</td>
</tr>
</tbody>
</table>
Procurement

The Procurement subcommittee (PSC) is a working group designated by the University Business Council (UBC) in partnership with Business Process Reengineering Team (BPRT). The UBC is looking at business policies and practices across the University Of Vermont. This Procurement subcommittee will focus on items related to procurement as well as travel & expense. Specifically, the subcommittee will consider the University’s existing policies and procedures as related to procurement activities, as well as the business process workflow both within the department of Procurement Services and requisitioning units. The Procurement subcommittee is co-chaired by members from both the UBC and the BPRT.

Budgeting and Reporting

The issues related to budgeting range from the timeliness of the posting of budgets, the inconsistency in budgeting processes for different funds, the level at which budgeting is done, the methodology for budget building (incremental versus based on expected expenditures), the ease of monitoring budget to actuals throughout the year, the level of education and training of those responsible for the monitoring of budgets, to questions about accountability and oversight. Our project scope as related to reporting will include an attempt to get to the bottom of the rather vaguely defined problems surrounding reporting. Only after that can we determine what can be done to resolve issues.

IPEDS

Ensure that changes to support IPEDs reporting and data gathering requirements are in place at UVM.
The purpose of this project is to improve the processes associated with the retroactive changes to employee salary distributions. Currently, the process flow is not well understood. There are too many retro changes (5,000 in FY08). Paperwork is routed inconsistently to various offices on campus and forms are not filled out completely or contain inaccuracies.

### Timeline
1. Completion of current process work flow by 2/12/09
2. Interim report to UBC on 2/17/09
3. Focus group review by 2/20/09
4. Process redesign by 3/31/09
5. Focus group review by 4/15/09
6. Process finalization and report to UBC by 4/3/09

### Phase I – Chart of Accounts
1. Define issues with chart fields and chart strings. We have begun conducting a series of interviews with various units / individuals around campus to assess what the specific issues are related to the chart of accounts.
2. Review information collected from interviews and determine categories of issues to address.
3. Continued discussion about how to standardize rules and procedures related to the various funds which are used at UVM.

TBD
The objective of the PSC is the overall review and analysis of the procurement process functions within the University. We will look at the entire process flow beginning with the department’s entering of requisitions through the internal verification and payment process to the point where checks are mailed to the vendor. Within this analysis, special attention and consideration will be placed on items and findings from the Deloitte & Touche audit, and UVM’s management response to those findings.

The objective of the BAR is the overall review, analysis and improvement of the Budgeting and Reporting functions within the University. We will look at the entire budget process flow from the beginning of the budget cycle through budget management and analysis via reporting. The Reporting aspect of this project will focus not so much on the development of new reports, but rather on the overall reporting strategy, ongoing report development methodology and on training, although some new reports may be created as we gather feedback. Note that the scope of the reporting part of this project is not restricted to budget-related reporting, but that it is focused on reporting on the information that is housed in PeopleSoft.

Project includes system changes for both Banner Student data and PeopleSoft HR information. It also includes data gathering and communications planning.

Reporting:
Feb 2009 - Reporting Strategy Doc completion
March/April 2009 - Information Gathering
Summer 2009 - Training
Ongoing - Report Modification/Development

Budgeting:
Feb 2009 - E-level account analysis & proposal
March 2009 - E-level changes ready for budget-building
June 2009 - E-level changes ready in Finance
Ongoing - roll-out of standard Excel budget analysis model
FY2010 - Changes for gift budgeting
FY2011 - Any other recommended changes for budgeting