



SANTA CLARA UNIVERSITY

Business Managers Meeting

September 29, 2011

Room 126 – Lucas Hall

2:30 - 4:00pm



Goals

Primary themes:

- Communication
- Coordination
- Accountability
- Customer focus

Share information across Departments

Work together to resolve issues

Identify business challenges and opportunities

Emphasize teamwork / customer focus

Keep a positive approach



Agenda

<u>Topic</u>	<u>Speaker</u>	<u>Time</u>
Introduction	Sam Florio	5
Contract Review	Bridget Colbert	5
Employment Categories	Eréndira Rubin	10
Risk Management / Compliance	Sam Florio	15
Consolidated Operating Budget Update	Dennis Roberts	15
FY 2011 Accomplishments		
FY 2012 Operating Budgets		
Open Discussion / Action Items		30



SANTA CLARA UNIVERSITY

Contract Review

Bridget Colbert
Assistant General Counsel

x2186



University Employment Categories

- **Regular Employees** - continuing positions
 - Full Time
 - Part Time
- **Academic Staff** - research, librarians, instructional staff, academic advisors
- **Union Staff** - collective bargaining agreement (CBA)
- **Fixed-Term** - renewed annually, dependent on funding
- **On-Call/Per Diem** - occasional, unpredictable schedule
- **Student employees** - 20 hr. limit when school in session



University Employment Categories

- **Other Categories – *Non-Employees***
 - **Temporary Workers - fill in for regular employee**
 - Temp agency hiring: Contact: [Li-Shan Feng, x4388](#)
 - **Independent Contractors - contracted by the University for specialized skills/expertise**
 - requires University Finance Office approval
 - paid through Accounts Payable
 - Contact: [Khanh Chau, x5497](#)

- **Employment Issues: [Eréndira Rubin, HR Legal Associate Ext. 5495](#)**



Compliance

- **Compliance is becoming an important part of daily university activity**
 - Trustees and University Administration want to emphasize compliance across campus
- **There are roughly 50 different compliance reporting requirements for institutions of higher education**
 - Include: Clery Act Campus Crime Statistics reporting, NCAA reporting, IRS Form reporting, student loan interest requirements, Controlled substances information, emergency and hazardous chemical inventory
- **Goal is to clarify how SCU is responding and make certain we are in compliance**



Compliance

- **My role will be to determine who on campus is responding and how we are responding**
 - If we are not responding properly, I will aid the department by helping provide resources to empower them to adequately respond

- **Contact: Sam Florio, University Risk Manager**
Ext. 4603



Consolidated Operating Budget

- FY 2011 Results / Lessons Learned
- FY 2012 Budget Set up
- Open Discussion



**Thank you to *Risk Management*
for hosting today's meeting!**

Upcoming Business Managers Meeting

- **Thursday, February 16, 2012**

(Host Needed)



SCU Business Managers

- Provost Office- Robin Reynolds
- Budget Office- Dennis Roberts, Lucy Sardinha
- Bursar- Denise Burt
- Registrar- Monica Augustin
- Controller- Sarah Gatenby, Ramona Sauter
- HR- Charlie Ambelang, Ingrid Williams
- Risk Management- Sam Florio
- Student Life- Matt Cameron, Jon Gray
- IT- Carl Fussell, John Bright, Sheila Krumm
- Business School- Liz Barron Silva
- Engineering School- Scott Andrews
- Law School- Jacqueline Wender, Ben Martin
- College of Arts and Science- Kathleen Schneider, Rafael Ulate
- Counseling Psychology Educ- Josephine Ishou
- DeSaisset Museum- Rebecca Schapp

Centers of Distinction:

- Markkula Center- Monica DeLong
- Science /Technology- Karen Ajluni
- Ignatian Center- Theresa Ladrigan-Whelpley
- Undergraduate Studies- Robert Covich
- International Studies- Lori Johnson
- Univ. Relations/ Development- Alma McChesney, Paul Neilan, Margaret Avritt
- Athletics: Jon Clough, Janice DeMonisi, Tim Hauser
- Financial Aid : Joel Putnam
- Undergraduate Admissions: Charity Garcia
- Univ. Support Services: Ed Merryman
- Auxiliary Services: Jane Barrantes
- Facilities: David Cajigas, Don Akerland
- Campus Ministry: Peggy Tritto



Appendix



University Employment Categories

- Regular
- Academic Staff
- Union Staff
- Fixed-Term
- On-Call/Per Diem
- Student employees



Regular Employees

- Positions that are expected to continue
- Includes full-time and part-time positions
- Full-time: Position scheduled for 30 or more hours per week
- Part-time: Position scheduled for 20 or fewer hours per week
- Employees working 20 or more hours per week are entitled to benefits
- Position scheduled for between 21 and 29 hours per week → hybrid benefits



Academic Staff

- **Non-faculty academic positions**
 - **Research Staff**
 - **Librarians**
 - **Instructional Staff**
 - **Academic Advisors**



Union Staff

- **Positions covered by a collective bargaining agreement**
- **SCU is party to CBAs with Local 715 SEIU, AFL-CIO/CLC & SEIU Local 265**
- **Union employees predominantly in Facilities and the Cemetery**
- **Terms and conditions of employment governed by the CBA**



Fixed Term

- Position that is expected to be for a fixed period greater than six months
- Often is co-terminous with funding
- Can be renewed for consecutive terms
- Examples:
 - Project managers
 - Scientists on particular contracts or grants



On-Call/Per Diem Employees

- **Positions for special work needs involving on-call scheduling**
- **Schedules are not regular and often not predictable from week to week**
- **Positions are typically fixed term**
- **On-Call employees should not be used repeatedly to fill work needs that have a regular or consistent schedule.**



Student Employees

- SCU student employees, including international students
- May work up to 20 hours per week while school is in session
- May work up to 40 hours per week during academic breaks
- Includes students receiving work-study
- For more information contact Liz Mireles x6444



Temporary Workers (non-employees)

- **Position for special project, temporarily meet additional workload, or temporarily filling in for a regular employee.**
- **Positions are for a fixed term of six months or less**
- **If seeking a temporary worker from a staffing agency please contact Li-Shan Feng, x4388**
- **Temporary workers are not University employees - they are employees of the staffing agency**



Independent Contractors (non-employees)

- Individuals contracted by the University for working using their specialized skills/expertise
- Not employees of the University
- Not performing work that is or could be done by an employee
- Departments must request approval to contract with an independent contractor / consultant from UFO
- For more information contact Sarah Gatenby, x4397