Agenda

10:30 – Welcome – Introduction
   Omnia Elgendy, Budget Analyst, oelgendy

10:35-10:50 – CHSS Development

10:50 – 11:20 - Finance & HR Team

11:20-12:15 - Small Group Discussion/Report Out
CHSS Strategic Priorities

1. Support enrollment growth and strategic curricular innovation

2. Address longstanding faculty and staff compensation and career development issues

3. Strengthen support for research and graduate education

4. Enhance PR for CHSS faculty, students and alumni achievements

5. Diversify the college’s development portfolio and enhance gift stewardship, alumni engagement, and alumni giving

6. Strengthen the college’s culture of shared governance
CHSS Financial Outlook - FY21

FY21 CHSS E&G Budget
Enrollment target = FY20 actual (this is set by OBP)
• Expenditure authority
  Original Budget - $72.7M
  Revised Budget - $68.6M (5.67% cut)

FY21 Projection
• Enrollment – down only 1% - well done by all, given the circumstances!
• Tuition Revenue – $4M under budget; growth in graduate enrollment tempered by large decrease in UG OOS (CHSS slightly larger decline than university)
• Expense – projected spending $71M

Projected use of fund balance ($20M) in FY21 - $6.4M ($2.4 overspend + $4.0 enrollment shortfall)
Human Resources

- Term multi-year appointment materials will be processed through Interfolio. Due date is August 26.

- Classified Staff/Faculty Separation Form – new Dynamic form on HR website. Employee completes Section 1.

- Search Committee Confidentiality Form now a Dynamic form.
Mason Gateway

- All Payment Request reimbursements and upcoming travel may be directly billed to Start-Up(Org. 103404) or Faculty Funding (Org. 103454).
  - If you are unsure that the expense is allowable, please contact Shirley Steppe prior to submission.

Summer Hiring

- Instructions for Summer instruction, Summer research and Faculty Summer Administrative positions have been sent to the units.
- All contracts for upload submission or Ez EPAF should be emailed in .pdf format to chssfin@gmu.edu
Policy Updates from OSP

1. **Policy 4009: Subrecipient Monitoring Policy**
   - PIs who have current subawards or may submit proposals with subawards should review.
   - Procedure document now included that more clearly outlines responsibilities of OSP teams, PI and department administrators (units).
   - We ask that administrators assist PIs in ensuring invoices received are reviewed for allowable charges.

2. **Policy 4012: Principal Investigators** (for sponsored projects and IRB)
   - PI Eligibility by Appointment (e.g. tenured, tenure-track, full time instructional/research faculty)
   - PI Eligibility by Exception (e.g. part time instructional/research faculty, post-doctoral fellow, adjunct, affiliate faculty)
     - New procedures and form required for exception requests.

New Resources

1. **Award Transfer Checklist** ([OSP Post Award](https://wwwosp.gmu.edu/post-award) website)
   - New faculty transferring awards into Mason
   - Faculty leaving Mason and transferring awards to a new institution

2. **New 2021 Salary Cap calculators** ([OSP Forms](https://wwwosp.gmu.edu/forms) website – DOJ, DHHS, USDA/NIFA)
The New CHSS Reconciliation Procedures for grants are finally here and will take effect on April 1, 2021.

The new procedures are based on the University Reconciliation Policy 2114 and include the following four major components:

1. **CHSS Reconciliation Procedures for Reconcilers (Grants) – Guide**
   - The new guide is specific to reconcilers and contains information about certification requirements, certification approval options, reconciler/approver/PI responsibilities, the timeline and a sample of the email certification template

2. **CHSS Guide for Principal Investigators – Guide**
   - The new guide is specific to PIs and comprises information about the importance of reconciliations, how frequently should grants be reconciled and responsibilities of the PIs

3. **CHSS Reconciliation Certification Form - New Dean’s Office Form**

4. **Reconciliation Completion Form Email Template – Dean’s Office Monthly Generic Email (sent from chssrsch@gmu.edu)**

***All reconciliation guides can also be accessed on the CHSS Research Administration Website at: [https://chss.gmu.edu/staff/research-administration](https://chss.gmu.edu/staff/research-administration)***
## Spring Calendar (tentative)

<table>
<thead>
<tr>
<th>Event</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year end AP (Accounts Payable) deadlines published</td>
<td>MAR</td>
</tr>
<tr>
<td>(contact CHSS Finance &amp; HR office if copy needed)</td>
<td></td>
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<tr>
<td>PT and GL budget transfers to departments and programs</td>
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<tr>
<td>BTS opens for Summer hiring 2021</td>
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<tr>
<td>Department/Program budget reports sent. Meetings upon request.</td>
<td>APR</td>
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<tr>
<td>Spring tuition waivers reconciled</td>
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<tr>
<td>Academic year 2022 tuition rates established by BOV (Board of Visitors)</td>
<td>MAY</td>
</tr>
<tr>
<td>BTS opens for Fall 2021 GA and PT assignments (May/June)</td>
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<tr>
<td>Fall Health Insurance eligible students list due to Provost’s Office – students begin enrolling for Fall 2021</td>
<td>JUL</td>
</tr>
</tbody>
</table>
Updates

• New OBP process: effective FY22, DE budget will be allocated using new BOV Expense Categories

<table>
<thead>
<tr>
<th>BOV Categories</th>
<th>Summary Accounts</th>
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<tbody>
<tr>
<td>Contractual Services</td>
<td>71100</td>
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<td>Travel</td>
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<tr>
<td>Supplies</td>
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<td>Equipment</td>
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<tr>
<td>Capital Outlay</td>
<td>77000</td>
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<tr>
<td>Scholarships &amp; Fellowships</td>
<td>78500</td>
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<tr>
<td>Continuous Charges (Utilities, Rental, Cap leases, etc)</td>
<td>74001</td>
</tr>
<tr>
<td>All Other Elements</td>
<td>70000</td>
</tr>
</tbody>
</table>
Outlook tips & tricks

Searching Outlook email using single or multiple targeted search criteria

CNTL-SHFT-F

Search by key word, phrase, sender or recipient. Exact phrases can be search for using double quotes, “graduate assistant”

*make sure to specify all search folder being searched using ‘Browse’ button and clicking personal folder and/or subfolders
Outlook tips & tricks (con’t)

Search by read/unread, emails with attachments, importance and flagged

*make sure to specify all search folder being searched using ‘Browse’ button and clicking personal folder and/or subfolders
Outlook tips & tricks (con’t)

Search by fields, including dates sent and received, etc.

*make sure to specify all search folder being searched using ‘Browse’ button and clicking personal folder and/or subfolders
Save the Dates

Fiscal Support and Connections Network (FSCN) Meetings 1pm-2pm
• Tuesday, April 20
• Tuesday, May 18
• Tuesday, June 15

Be on the lookout for:
• MicroStrategy training needs survey
• CHSS Inclusive Excellence Town Hall
Return to Campus - Small Group Discussion

1. How do you feel about coming back to campus Fall semester?

2. In Fall 2021, how many days/week do you plan to come to campus?

3. What will make the transition back/working in two places easier?
Thank you for joining us!