RESOLUTION

concerning

RECLASSIFICATION OF POSITION

INTERNAL BUDGETING & CHRO COMPLIANCE SPECIALIST/ADMINISTRATOR II
to
ASSISTANT DIRECTOR OF FISCAL AFFAIRS/ADMINISTRATOR III

at
EASTERN CONNECTICUT STATE UNIVERSITY

June 15, 1990

RESOLVED, That the position of Internal Budgeting & CHRO Compliance Specialist/Administrator II at Eastern Connecticut State University be reclassified to Assistant Director of Fiscal Affairs/Administrator III effective June 15, 1990, in accordance with all provisions and expectations as set forth in the proposal dated January 19, 1990, which is attached as an addendum to this resolution.

A Certified True Copy:

[Signature]
Dallas K. Beal
President
To upgrade the position, Internal Budgeting and CHRO Compliance Specialist (Adm.2) to Assistant Director of Fiscal Affairs (Adm.3).

This position has expanded greatly in the past six months to the point where it encompasses all of the Fiscal Affairs area. Increasing internal and external budget requirements along with various compliance regulations make this upgrading necessary. A salary increase is requested commensurate with the increase in duties.

$3,016.00
Position Title: Assistant Director of Fiscal Affairs

Campus: Eastern Connecticut State University

Date: 2/15/90

**LEVEL 1.** Day 0 Campus DPA creates and presents package to Chapter level SUOAF/AFSCME designee for review. Attachments shall include the following items where applicable: 1) a copy of this sheet, 2) new and former position descriptions, 3) salary, rank, and rationale for PERC and the Board, and 4) any additional information required.

**INITIATING PRESIDENT OR DESIGNEE:** Michael Pernal, Executive Dean

**DATE PRESENTED TO CAMPUS SUOAF REPRESENTATIVE:** 2/15/90

**SUOAF/AFSCME CAMPUS REVIEW AND RECOMMENDATION BY:**

**DATE OF SUOAF CAMPUS REVIEW:** 2/26/90

The above-mentioned package has been forwarded to the local union by the campus DPA.

**LEVEL 2.** Not to exceed 10 working days after receipt Statewide SUOAF/AFSCME review occurs during this interval. Further negotiation may occur at this level prior to final Union approval. Upon such approval SUOAF shall return all materials to the initiating University DPA or his designee.

**SUOAF/AFSCME LOCAL PRESIDENT OR DESIGNEE:** Oliver R. Hayes

**DATE:** 2/26/90

**DISPOSITION AT SUOAF LOCAL LEVEL:**

( ) approve proposed rank and salary

Comments or Recommendations:

( ) disapprove proposed rank and salary

**RETURNED TO LOCAL DPA**

**LEVEL 3.** Not to exceed 70 working days after receipt Local DPA brings paperwork to statewide DPA's meeting for review. If no further issues arise, the document is signed by and remains with the Vice President for Personnel. The Vice President for Personnel also provides a signed copy to the SUOAF/AFSCME Local President. If significant changes are required, documents are returned at Level 1. Minor changes may be effected by appropriate phone consultation.

**DATE CONSIDERED BY DPA'S COUNCIL:** prior to 5/1/90

**DISPOSITION AT COUNCIL LEVEL:**

( ) approve submission to PERC

Comments or Recommendations:

( ) disapprove submission to PERC

**VICE PRESIDENT FOR PERSONNEL:**

**DATE:** 5/30/90

**LEVEL 4.** Vice President for Personnel submits package to PERC at its next scheduled meeting. Upon PERC action it is the responsibility of the Campus DPA to inform the campus and Local SUOAF/AFSCME representative and appropriate management officials of PERC disposition.

**DISPOSITION AT PERC LEVEL:**

( ) approved

( ) disapproved

**DATE**

**DATE OF BOARD APPROVAL**

**DATE OF BOARD DISAPPROVAL**

OVER FOR APPLICABLE POSITION DESCRIPTION
POSITION DESCRIPTION

TITLE: ASSISTANT DIRECTOR OF FISCAL AFFAIRS

ADMINISTRATIVE RANK: 3

INCUMBENT: Mary Calarese

Under the supervision of the Director of Fiscal Affairs, the incumbent supervises the Office of Fiscal Affairs in the absence of the Director and/or Associate Director, participates in the coordination of the University internal budgeting process and coordinates CHRO contract compliance and the Small Business Set-Aside Program. The incumbent also participates in the preparation and reporting of budget data to external agencies. Position responsibilities include:

1. Supervises the Office of Fiscal Affairs or sections thereof in the absence of the Director and/or Associate Director.

2. Participates in the design and distribution of budget request forms to departmental budget authorities and advises on the completion of such.

3. Reviews completed forms for thoroughness and accuracy (seeking clarification and corrections, if necessary) and prepares a summary.

4. Serves as a resource person for budget authorities including training and advising and answering specific questions, and as a resource person to senior management to assist in developing budget allocations.

5. Participates in the establishment and maintenance of an ongoing budget monitoring and reporting system for all funding sources.

6. Reviews departmental requisitions and contracts for conformance to budget plan and assists in the coding of such.

7. Participates with Fiscal Affairs personnel in the display of interim and final financial results for internal and external use, including specific components for which the incumbent may have complete responsibility.

8. Assists in compiling data and completing forms and surveys as required by external agencies such as DHE and OPM.

9. Insures that the University complies with CHRO policies and regulations with respect to all purchasing transactions and capital projects.

10. Coordinates the Small Business Set-Aside Program.
11. Prepares reports as required.

12. Performs other duties and responsibilities related to those enumerated above which do not alter the basic level of responsibility of the position.

QUALIFICATIONS

At least three years of experience in the administration of business services in a complex setting. Experience in administering a computerized budgeting system is required. Bachelor’s Degree required; Master’s preferred.

These qualifications may be waived for individuals with appropriate alternate experience.

[Signatures and dates]
TITLE: INTERNAL BUDGETING AND CHRO COMPLIANCE SPECIALIST

ADMINISTRATIVE RANK: 2

INCUMBENT: MARY CALARESE

Under the supervision of the Director of Fiscal Affairs, the incumbent assists with the coordination of the University internal budgeting process, and coordinates CHRO contract compliance, and the Small Business Set-Aside Program. The incumbent also assists in the preparation and reporting of budget data to external agencies. Position responsibilities include:

1. Helps design and distribute budget request forms to departmental budget authorities and advises on the completion of such.

2. Reviews completed forms for thoroughness and accuracy and prepares a summary.

3. Serves as a resource person for budget authorities and provides data to senior management to assist in developing budget allocations.

4. Helps establish and maintain an ongoing budget monitoring and reporting system for all funding sources.

5. Reviews department requisitions and contracts for conformance to budget plan and assists in the coding of such.

6. Advises and assists Fiscal Affairs personnel on closing end of year records.

7. Advises and assists accounting personnel on the display of final results on financial statements to the department level.

8. Assists in compiling data and completing forms and surveys as required by external agencies such as DHE and OPM.

9. Insures that the University complies with CHRO policies and regulations with respect to all purchasing transactions and capital projects.

10. Coordinates the Small Business Set-Aside Program.

11. Prepares reports as required.

12. Performs other duties and responsibilities related to those enumerated above which do not alter the basic level of responsibility of the position.

QUALIFICATIONS
At least two years of experience in the administration of business services in a complex setting. Experience in administering a computerized budgeting system is preferred. Bachelor's Degree required; Master’s preferred.

These qualifications may be waived for individuals with appropriate alternate experience.

For the University Date For the Union Date
12/2/88
EASTERN CONNECTICUT STATE UNIVERSITY
OFFICE OF FISCAL AFFAIRS

TABLE OF ORGANIZATION

Director of Fiscal Affairs
John Ferris

ACCOUNTING

GEAR, APPRO-
FINANCE, PREMION
VENUE & STUD-
ACTIVITIES

Principal
Howard Evers

Accountant
Anita Jean

Accountant 1
Karen Otero

University
Assistant
(19 hours)

PAYROLL

Design 1
MONITOR

BUDGET

ACQUISITIONS

Associate Director of Fiscal Affairs
Ned Bullard

TRAVEL

RECEIVING

ACCOUNTS

PURCHASES

STOREROOM

INVENTORY

SECRETARY

RECEIVING

SUPPLY SERVICE

OFFICE OF MURAL
ANCE.

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ASSISTANTS

2

(35.5 hours)

Senior 2 - Senior
Clerk
Katharina
Clerk
Katharina

Senior
Clerk
Clerk
Betty

Secret.
ary
2

All
Full Time & Two Half Time Positions.
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<thead>
<tr>
<th>Position</th>
<th>Name</th>
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<tbody>
<tr>
<td>Director of Fiscal Affairs</td>
<td>John Beckett</td>
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<tr>
<td>Associate Director of Fiscal Affairs</td>
<td>Hill Bullard</td>
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<tr>
<td>Principal</td>
<td>Howard Korsu</td>
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<tr>
<td>Accountant</td>
<td>Anita Jean</td>
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<td>Accountant 1</td>
<td>Pamela Carchidi</td>
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<td>Payroll Officer</td>
<td>Carol Wright</td>
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<tr>
<td>Accountant 2</td>
<td>Evelyn Leslie</td>
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<tr>
<td>Payroll Clerk</td>
<td>Jean Jones</td>
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<tr>
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<td>Mary Ann Coughlin</td>
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<tr>
<td>Financial Clerk</td>
<td>Shirley Audet</td>
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<td>BUDGET</td>
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<td>PAYROLL</td>
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<td>ACQUISITIONS</td>
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<td>PURCHasing Services Officer 1</td>
<td>Jane Mailhot</td>
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<td>TRENDY</td>
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<td>ASSISTANTS</td>
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<tr>
<td>Secretary 2</td>
<td>Blanche Auger</td>
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<td>Fiscal Assistant Paaela Carcenidi,</td>
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<td>Administrative Storage Phyllis Bessette,</td>
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<td>John Slowik</td>
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<td>University</td>
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<td>Assistsents 2</td>
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<td>(35.5 hours)</td>
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<td>Senior 2 - Senior 3</td>
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<tr>
<td>Clerk 1</td>
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<td>Katheryn</td>
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<td>Clerks</td>
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<td>Holly</td>
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<td>Financial Clerk</td>
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<td>Shirley Audet</td>
<td>Shirley Audet</td>
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<td>12/29/89</td>
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<tr>
<td>OUT STUDENT LABOR</td>
<td>FULL TIME &amp; TWO HALF TIME POSITIONS.</td>
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