Business Administrator Services (BAS) Forum
September 15
Lean Office Updates

Presented by
Holly Slocum, Senior Director of Process Evaluation and Improvement
The Lean Kent State Office

Process Evaluation and Improvement
Executive Steering Committee
Chaired by Dr. Mark Polatajko
University Wide Steering Committee
  Lean Leaders
  Lean Liaisons
  Lean Practitioners
University Community
The Lean Kent State Office
Role of the Lean Liaison

About the Role
The Lean Liaison is an integral role of a university wide effort to promote and support a Lean culture at Kent State University. A designated liaison from each division understands and communicates the value of Lean, serves as a connection to, and collaborates with the Lean Kent State Office.

Throughout Your Division
- Communicate what Lean is all about and how it’s making the university more efficient and effective through process improvement
- Communications might include:
  - How Lean is being used throughout the division
  - Success stories and measurable results
  - Training opportunities
  - Promoting and coordinating Lean certification of division staff (Lean Practitioner)
  - Publicly recognizing those individuals who are going beyond learning Lean and are using Lean to effect change and achieve results

With Your Division’s VP and Senior Staff
- Keep senior staff well-informed of Lean activities inside the division, in other divisions, and enterprise wide
- Promote lean training opportunities for staff development
- Provide guidance to ensure that Lean projects align with division/university goals
- Encourage leadership to recognize people who are putting Lean to work

With Internal Division Projects
- Guide the scoping process so that improvement projects are set up for success
- Ensure that projects are facilitated by Lean trained staff
- As projects unfold, answer questions relating to the improvement process, or find people who can
- After events, follow up with teams and attend update meetings to ensure implementation and sustained results

With Other Lean Liaisons and Lean Leaders
- Reach out to other liaisons with questions and calls for assistance
- Respond to their requests for assistance by providing info, suggestions, and help

With the Lean Office
- Serve as the link between the Lean Office and division
- Serve on the university wide Lean Steering Committee with the Lean Office and Lean Leaders
- Know what’s available from the Lean Office, and put those resources to use
- As needed, contact the Lean Office for help with planning, prioritizing, and implementation of Lean projects
- Submit key Lean-related division measures, which are used by the Lean Office to calculate university results
- Be an active member of the Lean Community of Practice

With Lean Practitioner Training
- Coordinate teams for training
- As part of the Lean Steering Committee ensure projects are actively being worked on and completed
- Provide needed support, especially when newly trained colleagues are working on their initial projects
LEAN LIAISONS

Diversity, Equity and Inclusion
Vacant

Academic Affairs
Jennifer Abate

Enrollment Management
Jennifer McDonough and Michealle Gabrovsek

Finance and Administration
Renee Romine

Intercollegiate Athletics
Matt Papatheodorou

Philanthropy and Alumni Engagement
Nick Starvaggi

Research and Sponsored Programs
Lori Burchard

Student Affairs
Vacant

System Integration
Vacant

University Relations
Lindsey Myers

https://www.kent.edu/lean
Eight Lean Wastes
Defects
Incomplete forms, errors, or rework

Overproduction
Creating more items/information than needed

Waiting
Waiting on information or another process

Non-Utilized Talent
Under-using talents, skills, and knowledge

Transportation
Unnecessary movement of items or information

Inventory
Extra goods or services that are unused

Motion
Unnecessary movement of people

Extra-Processing
Completing more steps than needed
Lean Community of Practice Updates

• Continue to grow – 120 members from all over the university
• Using the Microsoft Team to keep the community engaged
  • Sign up from the lean office website - https://www.kent.edu/lean/how-get-involved
• Recordings of previous sessions available
• Next session **Tuesday, October 19**th **from 2:00 - 3:00 pm**
  • Data handling guidelines
What to expect when you’re contracting: *Contracting Basics*

Presented by
Michael Pfahl, Associate Counsel
Disclaimer

The views and any legal opinions expressed or contained herein is not specific legal advice from its Office of General Counsel. This presentation is for the educational benefit of the participants and each participant should always consult the Office of General Counsel directly when faced with a legal issue – as each legal issue comes with it a particular set of facts and circumstances.
Contracting for the University

- Governed by the Ohio Administrative Code (3342-5-04, 3342-5-04.1 and 3342-5-04.2)
- Can only obligate the university if you a) have the authority by policy, or b) have the authority by letter of delegation.
  - Signing a contract without authority can be deemed as “outside the scope of employment”
  - If someone signs a contract outside the scope of employment, they could be personally liable for any damages. ORC 3.12.
- See also, 3342-7-12, and 3342-7-12.1 (Procurement)
What is a “contract”? 

• 3342-5-04.1(C)(1) – “all written agreements intending to have legal effect between two or more parties where Kent state university, or any department within the university, constitutes one of the contracting parties.”

• Basically, two parties agree to do or not to do something (offer and acceptance, mutual consent)
  • Does not have to involve money!
  • Does not have to involve any University resources!
  • Click-Through-Agreements are contracts!!

• The IC Agreement provided on the HR site is only to be used if the Contractor does not have their own agreement.
  • Contractor = “one that contracts and thus, has their own.”
Structure of a contract

- Who are the parties?
- What do they want to do?
- When do they want to do it?
- How much have they agreed to pay/receive for it?
- What are the specific terms?
- Who is responsible if something happens/doesn’t?
- Where can the parties be sued?
- How can the parties terminate the agreement?
Practices to avoid

• Not knowing what you are agreeing to
• Not knowing how long the term of the contract is
• Not ensuring that the services are actually provided
• Paying contractors for work not performed
• Paying contractors for expenses not provided for in the agreement
• Not obtaining a fully-executed copy of the contract
• Not cancelling when it is not working out
• TRYING TO GET A CONTRACT IN PLACE AFTER THE WORK HAS BEEN PERFORMED (i.e. because “Accounts payable needs it for payment.”)
Tips for contracting with individuals

• Ask for a contract (email back-and-forth is not a contract).
• If the individual does not have contract, contact our office for further advice (i.e. may have to engage HR, outside counsel, other areas).
• Consider:
  • Specific duties
  • Term
  • Payment
  • Termination
  • Data/Access issues
Contract Retention

• All contracts must be retained for “Active +5 years” (or relevant policy)
  • [http://www.kent.edu/generalcounsel/legal-records](http://www.kent.edu/generalcounsel/legal-records)
• Must follow the Record Retention/Destruction processes at [http://www.kent.edu/generalcounsel/record-retention-schedule](http://www.kent.edu/generalcounsel/record-retention-schedule)
• Where do you keep all that paper?!
• What about all those electronic files?!
• “Where did we put that contract?”
• Finally: DO YOU HAVE BOTH SIGNATURES?
Google data storage

Presented by
Jim Raber, Exec Dir, Info Technology
Mark Meszar, Team Leader, Information Tech
Updates Include

- New Telecommuting Policy 3342-6-01.3
- Employee Wellness Incentive for COVID-19 Vaccine and Survey Completion
- Open Enrollment for Jan. 1, 2022
Telecommuting Policy 3342-6-01.3

**Definition:** Telecommuting is an arrangement of **two weeks or longer** that involves the completion of a portion or all of the 40-hour workweek from off campus.

**Effective Date:** A telecommuting policy has been finalized and effective Sept. 7 with approved telecommuting agreements to commence **Oct. 4, 2021**

**Eligibility:** Full-time unclassified employees and full-time, non-represented classified employees on all Kent State University campuses*

*Any flexible work arrangements covering represented employees require further discussion between relevant administrators and union leadership.*
Guiding Principles for Telecommuting Requests

• Kent State is a residential and in-person living and learning university - most employees will be working in person at their on-campus worksite

• Any telecommuting arrangement must be guided by what is best for students and the campus community AND the operational needs of the university

• Telecommuting cannot materially change the duties of the position, adversely affect academic and administrative services, and must maintain the equivalence of a full-time work schedule

• Decisions are made based on the overall division/college/campus and not each unit
Guiding Principles for Telecommuting Requests

• To be eligible for telecommuting, employees must meet the following performance standards:
  • Successfully completed their probationary period if applicable, and
  • Based on the latest performance review, deemed satisfactory and such performance must continue to be deemed satisfactory thereafter

• Request will require multiple levels of approval as determined by each division

• Telecommuting arrangements shall be administered consistently within each area
Guiding Principles for Telecommuting Requests

• Not intended to be used to address health-related issues, or as an alternative to leave as provided for in Chapter 6 of Section 3342 of the Administrative Code and Policy Register (i.e. sick leave, vacation leave, FMLA, etc.)

• Arrangements that deal with child or elder care, jury duty, personal preference, or personal or family medical issues are typically dealt with through FMLA, flexible work arrangements, or other accommodation

• Any employee telecommuting is expected to be engaged in the duties of their position during normal business hours

• Telecommuting arrangements may be adjusted or discontinued at the discretion of the employee or supervisor
Guiding Principles for Telecommuting Requests

• Telecommuting arrangements **should be reviewed annually as part of the annual review process or more often as needed**

• Employees approved for a telecommuting arrangement may be required to attend **in-person meetings and activities – at their own commuting expense**

• If performance is maintained, a telecommuting arrangement shall not affect an employee’s eligibility for **recognition and promotion**
Requesting a Telecommuting Work Arrangement
Getting Ready for Telecommuting Requests

1. Divisions have established designated telecommuting liaisons

2. HR trains telecommuting liaisons (completed by Sept. 1)

3. Telecommuting liaisons explain policy and procedures to division employees and answer general questions (Sept. 1 – 15)
Two-Step Process

1. Informal - Proactive, Conversation (Sept. 1 – 15, 2021)
   - Liaison initiates the process informally through group meeting or email
   - Departments should have heard from liaisons as initial training by Telecommuting Liaisons targeted for completion by Sept. 15

2. Formal Application (through HR)  (Sept. 16 – Oct. 1)
   - This step only applies to individuals that may have been approved for some level of telecommuting. Formal link to DocuSign would be provided here to formalize the process through Human Resources
Two-Step Process

Formal Application Process (Continued)

• Employee and Supervisor together complete Appendix A, which includes general terms of agreement and a technology checklist

• A signed copy of Appendix A is retained by the department of the telecommuting employee

Telecommuting arrangements that have been fully approved (through department and signed DocuSign form) may commence week of Oct. 4, 2021
Telecommuting Request Process

A request for a telecommuting work arrangement is a collaborative process between employees and their supervisor and division leadership. It begins when an employee expresses interest in telecommuting.

Employee expresses interest in telecommuting via the "Telecommuting Interest Form"

Supervisor reviews "Interest Form" and conducts meeting with employee to discuss further

Supervisor submits recommendations to 2nd level approver for "approvals" as well as "denials"

Final level approvers review requests, make decisions, and notifies supervisors

If approved, formal Telecommuting Work Arrangement Form is completed via DocuSign with EE initiating and final sign off by direct supervisor.

Only approved telecommuting arrangements are formalized through DocuSign

Supervisor & Employee Complete Appendix A
One last thought…

If an approved telecommuting arrangement includes a change in starting/end time, change in duration of lunch (i.e. 30 min vs 60), and/or a compressed work schedule, the employee MUST complete a **Flexible Work Arrangement Request** form in accordance with the Flexible Work Arrangement (FWA) policy 3342-6-01.2. It is possible to have a Telecommuting Arrangement in conjunction with a Flexible Work Arrangement running concurrently.
Flexible Work Arrangements (Review)

Supervisors may consider other options to increase flexibility for employees:

• **Alternative arrival/departure time**
• **Compressed schedule**
• **Extended lunch duration**
• **Short-term flexible work requests** (less than two weeks in duration) - supervisors should remain flexible with short-term flexible work requests including flexibility for where (i.e. telecommuting) and when work is performed.
• **Seasonal work schedules** (June, July) – the summer months may provide an opportunity for more flexibility, including some telecommuting

*Included in Kent State’s current Flexible Work Arrangements Policy 3342-6-01.2
Resources

The following links will provide access to the fillable Telecommuting Interest Form and the Administrative Policy on Telecommuting:

- Telecommuting Interest Form
  https://www.kent.edu/hr/wellness/telecommuting-interest-form

- Administrative Policy on Telecommuting (6-01.3) https://www.kent.edu/policyreg/administrative-policy-regarding-telecommuting

- Appendix A. Telecommuting Agreement & Technology Checklist
  https://www.kent.edu/hr/wellness/appendix-telecommuting-agreement-technology-checklist
  - This form is completed in conjunction with the *formal* Telecommuting Work Arrangement Form (DocuSign). This is completed by telecommuting employee and supervisor and maintained in the department

**Note:** All employees should go through the entire training from the Telecommuting Liaison before considering application for a telecommuting work arrangement. This presentation is not the training in its entirety or explicit to nuances within a given college or division.
Resources (continued)

General questions regarding telecommuting can be discussed with your supervisor and unit leadership. In addition, you may contact the following for assistance:

**Contact information**

**Kim Hauge, Executive Director**  
Employee Benefits, Wellness and Health Promotion  
330-672-7505 or khauge@kent.edu

**Deanna Duffy, Assistant Manager**  
Employee Wellness & Health Promotion  
330-672-0392 or duffy8@kent.edu or wellness@kent.edu

**For information regarding:**

**Employee Leave Benefits:** Employee Benefits at 330-672-3107 or benefits@kent.edu

*Should technical assistance be needed for DocuSign, you may open a support ticket at tinyurl.com/FWAHelp*
Employee Wellness Incentive for COVID-19 Vaccination
What Am I Eligible to Win?

- **$200 Flash Your Arm Wellness Reward** as part of the Employee Wellness Program’s “Pop Up Wellness Offering” for 2021

- **100 Wellness Your Way bonus points for Tier 2 for 2022** (gets you that much closer to earning $200 in 2022!)

- **Opportunity to be selected as a winner** in our weekly prize drawings – 32 winners selected each week through October 2021 - $8,000 in cash prizes awarded weekly for 9 weeks!
Who is eligible for $200 cash incentive and prize drawings?

All faculty and staff on all Kent State campuses may participate if they meet the following conditions:

1. **Are in a current continuing or term assignment.** Part-time employees are eligible, but temporary employees are not eligible. Student employees are not eligible for this program but are eligible for the [student incentives program](#).

2. **Have received at least one dose of a COVID-19 vaccine.** To be eligible for the $200 Wellness Reward incentive, at least one dose must be administered by Oct. 31, 2021. If you have not yet been vaccinated, see the [vaccine webpage](#) for information about where to get a vaccine.

3. **Have reported their vaccination information at Med+Proctor.** Even those who were vaccinated at the DeWeese Health Center on the Kent Campus must complete the [employee survey regarding vaccination](#) and register with Med+Proctor in order to be eligible for these incentives. The vaccinated will be automatically directed to the Med+Proctor site to register their vaccine status.

Open Enrollment Season is Upon Us

Save the Dates – Final Year End Reminders
Save The Dates – Open Enrollment

• **Kick Off Presentation via Zoom Tuesday, Oct. 12, 2021**

9 – 11 a.m. via Zoom
[https://us06web.zoom.us/j/86208256310?pwd=MXpseVNkTXVydhFhmQIMxMXFwTlh2dz09](https://us06web.zoom.us/j/86208256310?pwd=MXpseVNkTXVydhFhmQIMxMXFwTlh2dz09)

• **Open Enrollment Election Period - Oct. 18 – Nov. 5, 2021**

More information to follow. Watch your emails from Employee Benefits, Fac/Staff News, and Flashline announcements for more details starting Sept. 28.
Flexible Spending Account Reminders

• Please note any final increases or decreases to your 2021 FSAs must be submitted by Sept. 30 for 2021. This will allow us to make final adjustments for year end.

• You may access the change form at https://www.kent.edu/hr/benefits/flexible-spending-account-and-health-savings-account.

• Remember, these are use or lose it accounts so make sure you have budgeted appropriately for 2021 to maximize your tax savings and make your final adjustments by Sept. 30. Change forms should be directed to benefits@kent.edu.
Make Sure You Login to Your Open Enrollment Portal
Open Enrollment Oct. 18 – Nov. 5

• We strongly encourage all benefits-eligible employees to login to the Open Enrollment portal each year. This very important step, allows you to:

  • View and compare your 2022 contributions for medical, dental and supplemental life benefits you have or may want to elect
  • Ensure the accuracy of coverage for any eligible dependents. Add/remove dependents as needed during this qualifying period
  • Make FSA elections for healthcare and/or dependent care accounts for 2022, if you choose to have one of these accounts (you must re-enroll each year – no automatic enrollment is permitted)
  • Elect your contribution amount to your Health Savings Account, if enrolled in a high deductible health plan (HDHP) for the upcoming year
  • Complete your Opt-Out election and annual verification
Quick reminders

• Link to today’s recordings will be available later today using the link in the agenda or by accessing this link https://www.kent.edu/bas/forum-information

• Provide your topic suggestions and feedback @ https://www.kent.edu/bas/forum-information

• Request to be added/removed from BAS listerve @ https://www.kent.edu/bas/forum-information

• Next BAS Forum – Feb. 16