CALM: Centralized Accrued Leave Management Project

AAMG Update
June 9, 2011
Topics

• Background
• Goals
• Policies
• New Tracking System
• Upcoming Activities
• Contacts
Background

• Originated during budget reduction planning and adopted as a key SUMAR initiative

• Examine time off policies and practices, including:
  – Vacation
  – Sporadic absences
  – Optional holidays
  – Compelling reason time

• Steps
  – Review current policy administration and practices.
  – Evaluate and implement the appropriate technology.
Project Goals

• Develop and implement policies that are consistently, fairly, and equitably applied across campus

• Have accurate cost estimate of University’s paid time liability for financial stewardship, planning, and audited financial statements

• Track absences and balances efficiently

• Provide managers and staff with better tools to forecast and plan vacation time off
Project Team

Carolyn Ainslie, Project Sponsor
David Dobkin, Project Sponsor
Lianne Sullivan-Crowley, Project Sponsor

Steve Blechman, Project Manager
Karen Bredbenner and John Martin, Policy Leads

Staff from:
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Chemical and Biological Engineering, Department of
Dean of Campus Life, Office of the
Dean of the Faculty, Office of the
Executive Vice President, Office of the
Facilities Organization
Finance and Treasury, Office of

General Counsel, Office of
Human Resources, Office of
Information Technology, Office of
Molecular Biology, Department of
Physics, Department of
Provost, Office of the
University Services
Woodrow Wilson School
Employees Affected by Policy Updates

Included:

• Benefits-eligible staff

Note:

– Union employees follow contract provisions as appropriate
– Maintenance and service employees follow their current vacation accrual schedule
– Academic professionals (librarians, specialists, researchers) follow HR policy with some additional DoF guidelines

Not included:

• Faculty
• Visitors
Guiding Principles for Policy Development

- Promote consistency, equity, and fairness
- Deliver simplified, clearly-written policies
- Document and standardize practices
- Maintain appropriate level of management discretion
- Create central system of record in PeopleSoft for time off tracking and balances
- Become effective July 1, 2012
### Comparison of Vacation Policy

<table>
<thead>
<tr>
<th>Provision</th>
<th>Current</th>
<th>July 1, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accruals for Monthly-paid Staff</strong></td>
<td>24 days</td>
<td>24 days</td>
</tr>
<tr>
<td><strong>Accruals for Biweekly-paid Staff</strong></td>
<td>22 days</td>
<td>24 days, Incorporates compelling reason and marriage/civil union</td>
</tr>
<tr>
<td><strong>Usage</strong></td>
<td>Use days after accrued or with supervisory approval</td>
<td>Use days as they are accrued</td>
</tr>
<tr>
<td><strong>Probationary Period, Biweekly-paid Staff</strong></td>
<td>Days earned credited upon completion of probation</td>
<td>Accruals begin from date of hire; probationary provision eliminated</td>
</tr>
<tr>
<td><strong>Accrual Limits</strong></td>
<td>6-day carryover</td>
<td>48-day maximum</td>
</tr>
<tr>
<td><strong>Payout upon Termination or Unpaid Leave</strong></td>
<td>30 days</td>
<td>30 days, Employees cannot schedule time off during notice period</td>
</tr>
<tr>
<td><strong>Partial Month Credit</strong></td>
<td>Not specified</td>
<td>Clarified for new hires, employees terminating, or those beginning or returning from unpaid leave</td>
</tr>
</tbody>
</table>
# Highlights of Sporadic Absence Policy

<table>
<thead>
<tr>
<th>Provision</th>
<th>Current</th>
<th>July 1, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policy Title</strong></td>
<td>Sporadic Absences Because of Illness or Injury</td>
<td>Sick Time</td>
</tr>
<tr>
<td><strong>Probationary Period, Biweekly-paid Staff</strong></td>
<td>Allows two days</td>
<td>Probationary provision eliminated</td>
</tr>
<tr>
<td><strong>Partial Month Credit</strong></td>
<td>Not specified</td>
<td>Described clearly for new hires, employees terminating, or those beginning or returning from unpaid leave of absence</td>
</tr>
<tr>
<td><strong>Annual Allotment</strong></td>
<td>8 days with carryover of 8 days, or a total of 16 days</td>
<td>8 days with carryover of 8 days, or a total of 16 days</td>
</tr>
<tr>
<td><strong>Prorated Benefits for Part-time Employees</strong></td>
<td>Not specified</td>
<td>Time off prorated</td>
</tr>
</tbody>
</table>
# Highlights of Personal Time Policy

<table>
<thead>
<tr>
<th>Provision</th>
<th>Current</th>
<th>July 1, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy</td>
<td>2 optional holidays (in holiday policy)</td>
<td>2 personal days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Eliminates optional holiday provision from holiday policy, to be revised accordingly</td>
</tr>
<tr>
<td>Partial Year Credit</td>
<td>Specifies if hired before or after January</td>
<td>No change</td>
</tr>
<tr>
<td>Prorated Benefits for Part-time Employees</td>
<td>Not specified</td>
<td>Time off prorated</td>
</tr>
</tbody>
</table>
Absence Management Tracking System

• New PeopleSoft Absence Management System available next year to employees and managers through HR Self Service
• System to track time off, maintain balances
• Biweekly-paid employees: enter time in TCS, approved by managers; data to flow directly into system
• Monthly-paid employees: enter time off directly into system, approved by managers
• Roll out to departments from July 2012 through December 2012
Upcoming Activities

• **Summer 2011**—Review, comment, and collect data in departments

• **Early fall 2011**—Final policies posted on the HR website

• **FY2012**—Departments prepare for new policies
  – Establish tracking processes
  – Identify current balances

• **January 2012**—Begin PS Absence Management System module implementation

• **July 1, 2012**—New policies go into effect and system rollout to pilot departments and to all departments by December 2012.

• **July 1—December 31, 2012**—System rollout to pilot departments first, then to all departments by end of year
Questions?

Please contact your senior Human Resources manager:

<table>
<thead>
<tr>
<th>Senior HR Manager</th>
<th>E-mail</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
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