

USM AOP General Meeting

Via Teams

March 16, 2021

- I. **Call to Order and Roll Call:** Meeting called to order at 12:02 p.m.

The following were in attendance:

- II. **Recognition of Guests:** *Andrea Phillips*

- I. Andrea presented on the role of the Controller's Office and provided a handout that is accessible using the following link- https://smтт-my.sharepoint.com/:w/g/personal/w945616_usm_edu1/EdEdH3pA5f9GrdEcVQXU2YYBbzGlvthW8SUWPRmlnVkenQ

[my.sharepoint.com/:w/g/personal/w945616_usm_edu1/EdEdH3pA5f9GrdEcVQXU2YYBbzGlvthW8SUWPRmlnVkenQ](https://smтт-my.sharepoint.com/:w/g/personal/w945616_usm_edu1/EdEdH3pA5f9GrdEcVQXU2YYBbzGlvthW8SUWPRmlnVkenQ)

- i. What they handle?
 - a. Payroll
 - i. Biweekly and monthly payroll processing
 - ii. Payment of various payroll taxes and deductions
 - Like BlueCross, dental and vision
 - iii. Issuance of annual W-2s
 - Contact them if you have not received
 - b. Tax Compliance- even though we are tax exempt
 - i. Processing of Personal Service Agreements (for independent contractors)
Remittance of Sales tax- to pay taxes on items we sell
 - ii. Review of awards, stipends and other payments to individuals to make sure no tax has to be withheld
 - iii. International vendor setup approval
 - iv. Approve payments to foreign nationals (individuals or companies- as there are tax withholdings and different tax forms)
 - Set up international vendors
 - Approve payments
 - c. Financial reporting
 - i. Any charges to budgets that are not for invoices
 - ii. General Accounting-any charges not for invoices (interdepartmental invoices, auxiliary)
 - iii. Loading and review of Monthly Detail Report
 - Contact them with MDR questions
 - iv. Issuance of annual financial statements
 - v. ACH receipts
- ii. What don't they handle? Receive questions for items do not handle- not a problem to contact them they will assist you in identifying who handles
 - a. Enter Direct Deposit information- done by HR- cannot pay people and oversee who receives payment
 - b. Employee addresses on W-2- maintained in Human Resources
 - c. Payments for invoices- processed by accounts payable
- iii. Who to call for specific needs?
 - a. One of these three listservs
 - i. Controller's Office- controllersoffice@usm.edu

- ii. Payroll- payroll@usm.edu received by Caitlin, Alison & Kim Brandon (Payroll Manager)
 - Caitlin Sumrall (6.4087 or Willa.Sumrall@usm.edu, who handles time entry and W-2 questions
 - Alison Robertson (6.4089 or Alison.Robertson@usm.edu who handles payroll data questions
 - iii. Tax Compliance- taxcompliance@usm.edu
 - Melody Duncan 6.6677 or Melody.R.Duncan@usm.edu
 - To submit PSA, send to psa@usm.edu
 - To submit sales tax reporting, send to salestax@usm.edu
 - b. For Accounting/Financial Reporting
 - Interdepartmental invoices can be sent to Joseph Steadman 6.5731 or Joseph.Steadman@usm.edu or to the controller's office
 - Send MDR questions to Melody Duncan at 6.6677 or Melody.R.Duncan@usmedu
 - For ACH Receipt questions- email Joseph Steadman 6.5731 or Joseph.Steadman@usm.edu
 - ii. We average 150 receipts a week- some state incoming wire so difficult for us to figure out who they should go to. However, can contact Joseph on look out for specific amount, and then ask him to deposit to this DE- do not have to have this done through the Business Office.
 - iii. They maintain a list of unclaimed deposits that they work through
 - They use this list to contact departments who they know are expecting ACH to track it down but could be difficult to identify.
 - iv. When reached out to other universities, none of them had a good grasp on how to handle ACH receipts- some returned money if could not identify while some deposited into holding account.
 - v. We hold them for 2 years, and after that move and retain.
- iv. Training-
 - a. we only have a handful of training sessions available so moved to videos, including SOARFIN (GL Combo Class) which includes how to run MDR and look up budget. Email Andrea.S.Phillips@usm.edu to get someone set up for videos. Currently working on getting this updated based on suggestions. Payroll training time entry recently changed and there is a time approval training class both approval in Canvas. Email Payoll@usm.edu to get you set up for those training classes. Working on video to address the ACH's (Automated Clearing Houses/electronic payments).

- b. If you are interested in a specific training session, they can set up separate training classes, but they need ideas. Please email ideas to Andrea to get new programs out there.
- III. **Adoption of Agenda:** (Motion-Linda Dorsey; Second Jennifer Lewis). All in favor.
- IV. **Approval of Minutes:** Already approved minutes by email vote (minutes from last year and latest minutes from January of this year).
- V. **Inspiration** Valerie Craig provided the inspiration on the topic of The Past Is In Your Head: The Future Is In Your Hands- https://smttt-my.sharepoint.com/:p:/g/personal/w305249_usm_edu1/Ea6AcSBZL_pIlzAYIY1EOd4B9JQz_NKVntXeQgDaAQutaw?e=BCEusX
 - I. You must think a few years down the road to set goals now.
 - II. Must take control of your own life.
 - III. Think about what is best for you and your family as well as yourself
 - IV. Think less about the needs and wants of others.
 - V. Worrying does not take away anything that happened in the past. Just takes the peace away that allows you to have the courage to do what you must do.
 - VI. Grit- the commitment and persistence to keep moving forward.
 - VII. Interested in having a second career- second life.
 - VIII. Make time for the things that are important to where you want to go because what you do today and the way that you think today will determine where you end up in the future.
 - IX. Protect your beliefs.
 - X. Sometimes people think where they are is where you should be.
 - XI. Remove those barriers or self-doubt.
 - XII. Must start doing and start believing before you are ready.
 - XIII. Most of the times we are all that we need to be and just need to start setting our personal goals which we break down into smaller and smaller targets of which you could do today to reach a long-term goal.
 - XIV. There is something that we can do each day to further our goals.
 - XV. Make goals SMART (Specific, Measurable, Attainable, Relevant, and Time-based)
- VI. **Communications-**
 - I. Created a newsletter in January.
 - II. Would like to begin working on another newsletter.
 - III. Send suggestions for next newsletter- containing info about things that are relevant or about which you would like to find out such as the type of info Andrea provided.
- VII. **Reports of Officers/Committee Chairs:**
 - I. **Officer Reports:**
 - i. **President** (Valerie Craig)-
 - a. Remember that dues for 2021 are \$10 annually to keep certain expenses afloat and to provide scholarships and opportunities.
 - b. If you have not paid your dues or not sure you have, talk to Cindy Walker (Treasurer) or to Mary Maner.
 - c. January Newsletter submitted to the National organization for their newsletter award.
 - ii. **President Elect** (Katie Kitchens)-
 - a. Not in attendance.
 - iii. **Vice President** (Mary Maner)
 - a. We are still holding and still accepting your membership fees.
 - b. Workshops are going well.

- c. As far as the Gulf Park campus, we have 5 more scheduled by the end of the Spring semester.
 - d. Email Mary if you have suggestions for the summer.
 - e. People are enjoying the topics and notably we are connecting more with our campus and overall community.
 - f. Valerie noted that use of Teams has created so much buzz around sessions as compared to lower turnout that occurred prior to the pandemic.
 - g. Highest turn out and attendance during last year.
 - h. Jennifer advised Mary that the recording of the last webinar did not stop recording.
- iv. **Secretary and Hospitality** (Jennifer Lewis)
- a. Contacted by William Polston of WDAM who saw our story about the AOP, Staff Council and Sigma Alpha Lambda and will be covering our current donation drive delivery on the news.
 - b. Posed question that the \$10 is for the July 1st, 2021 start date.
- v. **Treasurer's Report and Affiliations** (Cindy Walker)-
- a. Budget balances as of 2/28/21
 - b. USM Budget \$,2454.44
 - c. Bancorp South Checking Account \$1,855.62
 - d. Comcast funds \$3,022.00
 - e. Southern Miss Federal Credit Union \$1,182.17
 - f. Total Budget from all accounts \$8,514.23
- vi. **Immediate Past President's Report** (Melissa Coker)-
- a. No report.

II. Committee Reports:

- a. **Affiliations** (Treasurer) (Cindy Walker)- continuing to accept nominations for administrator and office employee of the year through May 1st.
- b. **Budget** (Treasurer) (Cindy Walker)- see previous
- c. **Community Service** (Jennifer Lewis)-
 - i. 23 bags donated to Fieldhouse for the Homeless.
 - ii. Ongoing Spring Forward to Help the Needy drive- Staff Council, Sigma Alpha Lambda and Mississippi Association of Educational Office Professionals (MAEOP). Have advertised this with digital resource boards (listserv), twitter, Facebook, and webpage. People have reached out with items to donate. Valerie noted that we can post it on USM Talk. Jennifer noted going out on USM Talk, AOP, GCRL and SAL listserv. Some items are small personal and grooming items.
 - iii. Evaluating an Easter Basket donation effort our international students who are always in need. Grab bags discontinued and Little Green Pantry not approved: this population needs some resources as they are struggling still with expenses. Jennifer will reach out to those that participated before for baked goods. President Craig noted that our international students do not have the resources that our local students do. The Pantry is only open select hours so difficult to obtain food from Pantry.
 - iv. Virtual Volunteering- On USM site- Volunteer. Usm. allows you to transcribe documents from Freedman's Bureau.
- d. **Gulf Coast** (Mary Maner)-Had 4 virtual workshops and have 5 left.
- e. **Hospitality** (Secretary) (Jennifer Lewis)- n/a
- f. **In-service** (Pres-Elect) (Katie Kitchens)-

- g. **Membership** (Vice Pres) (Mary Maner)- no additional info.
- h. **Publicity** (co-Chairs Jennifer Lewis & Troy Knight)-
 - i. New app within Twitter called Review-publishes a Twitter newsletter
 - ii. When we post pictures, we obtain an increase in engagement/views
 - iii. Asking for volunteers, COVID, and new technology were highest views posts
 - iv. Increase in viewers in Twitter
 - v. Added request into Revue (getreview.co) to download WoofTrax app and sign up so our steps would result in a donation to Hub City Humane Society (who supports dogs in from various counties including out of state dogs). Also added a list of affiliates including link to new updated MAEOP site. Link to Higher Ed Council website and NAEOP site. Also includes a thought of the week.
 - vi. Instagram-Jennifer asked for videos for members to record videos for our Instagram.
- i. **Ways and Means** (Vacant)-Pam Bullard is not sure if the Comcast Tournament will take place this year or not which matters to us because it is a way for us to raise money.
- j. **PSP Advisory Committee Update** (Chair) (Cory Williams)- Cory was not able to attend, but she is working on a presentation about how to earn PSPs. However, HR is working on performance management and staff compensation changes, which needs to be finalized to see how it fits in with our national association PSP process to be sure what people are doing benefits their career at the university and their certification path. President Craig asked Krystyna Varnado to present today, but the scheduling did not work they will be holding sessions. If we hear about HR education sessions will take place, President Craig will share.

VIII. Old Business-

IX. New Business-

- I.** Nominations and Elections- Joyce Powell will chair committee. Starting process of nominating individuals for board positions. We will be holding elections because of that we will have another meeting in April because of the Special Nominations and Elections to get the process started to be elected prior to the upcoming academic year. Joyce will reach out to folks about serving as committee members.
- II.** Constant Contact- \$20 a year for newsletters. This allows there to be an accessible framework. We have been using Canva for the newsletter. Publisher is not accessible. PDFs people tend not to read and sometimes they do not open at all or correctly. Many USM departments are all using Constant Contact which also tracks who is reading the newsletter. President Craig noted that the board would evaluate that for a future expense. If it is easy to do and create, maybe we can put out more newsletters with less content per newsletter.
- III.** Affiliate of the Year- NAEOP award- affiliate can submit. Certain criteria we would have to meet. This past year have done a lot of work with workshops and volunteering. We would like to gather up what we have done to submit. 2020-2021 we had almost all our data but not all to complete the award application for this year. President Craig noted we did a lot of good work in 2020 so we will apply for next year's award, which will probably give us a better chance to win.

X. Announcements-

Meeting Minutes

- I.** Good News to Share-
 - i.** President Craig celebrating 30th anniversary and planning nice trip. Congratulations to President Craig.
 - ii.** Webinar tomorrow about Establishing and Maintaining Health in 2021.
 - iii.** Vaccinations made available to us on campus through the 19th with vaccinations available every 15 minutes.
 - iv.** Twitter- we will send out additional newsletters including Title IX Webinar based on the book Sexual Citizens.
- XI. Adjournment-** Motion by Cindy Walker and Second by Linda Dorsey. Meeting is adjourned at 1:03 p.m.