



SUPERVISOR ORIENTATION

Manage Smart.

Office of Human Resources and Strategic Talent Management

October 25, 2023

Welcome Back!

- Re-cap of First Day
- Share Joy



Agenda

- Welcome Back!
- Employee Engagement and Labor Relations
- Managing for Optimal Performance
- Procurement 101: Understanding the Procurement Process
- Budget Overview for Supervisors
- Navigating EAP
- Managing Life in the Workplace
- Managing Ethically and with Integrity

Employee Engagement & Labor Relations (EELR)

Meet the EELR Team



Carol
Kliever

Director,
Employee
Engagement
and Labor
Relations



Theresa
Julien

Human
Resources
Manager



Grecia
Coughlin

HR Specialist II
Employee
Engagement &
Labor Relations
Specialist



Christopher
Standing

HR Specialist II
Employee
Engagement &
Labor Relations
Specialist

EELR email address is:

EmployeeRelations@montgomerycollege.edu

Employee Engagement & Labor Relations (EELR)

Meet the EELR Team



Rowena
D'Souza

Risk Management
HIPPA Privacy



Teresa
Natera

Human
Resources
Leave Specialist



Carla
Ammerman

Human
Resources
Manager



Elaine
Doong

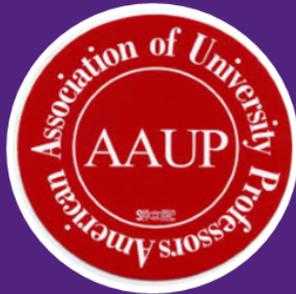
Human
Resource
Specialist II

EELR email address is:
EmployeeRelations@montgomerycollege.edu

Employee and Labor Relations

- Collective Bargaining Agreements at MC
- Policy & Procedure
- Complaint and Grievance Resolution
- Disciplinary and PIP Processes
- Internal Investigations
- Exit Process/Off Boarding

Three Unions at MC



American Association of University Professors (AAUP): **full-time faculty union** established in the late 1970's



American Federation of State, County, and Municipal Employees, AFL-CIO, Council 67, Local 2380 (AFSCME): **staff union** established in 1998



Service Employees International Union, Local 500, (SEIU): **part-time faculty union** established in 2008



Policies and Procedures

- **Policies** at Montgomery College are adopted by the Board of Trustees.
- **Procedures** are issued by the College President.
- Our official policies and procedures are segmented into seven chapters which can be found on our MC website.

- Chapter I - Board of Trustees
- Chapter II - Organization
- Chapter III - Personnel
- Chapter IV - Student Affairs
- Chapter V - Educational Program
- Chapter VI - Fiscal and Administrative Affairs
- Chapter VII - Facilities

- Policy and procedure modifications.

What do employees want in a supervisor?

- Communication
- Recognition (verbally or in writing)
- Leadership
- Coaching and Training
- Safe space for failure
- Accountability

Managing in a Union Environment

Bargaining Employees

- The CBA is a legally binding document that governs how the College interacts with unionized employees.
- CBA's allow some employees to be designated as “shop stewards,” people who are available on shift to advise and assist their fellow union members.
- While supervisors may disagree with the shop stewards on specific issues, it is important to always deal honestly and fairly with them. Treat others as you want to be treated.
- In a unionized setting, an employee has the right to request the presence of a union (shop) steward whenever an employee is subject to an investigatory interview, which might lead to discipline. The shop steward does not have the right to be disruptive or argue on behalf of the employee.
- Grievances filed should demonstrate a violation of an Article or Section of the CBA.
- Follow the Grievance process and timeline based on the CBA.

Ways We Can Help

- The College's Employee Engagement and Labor Relations (EELR) team is here to support healthy and productive work relationships that promote the mission of the College.
- We provide guidance and strategies to prevent, de-escalate & resolve workplace conflicts. Clear and open channels of communication between employees and managers are basic principles of sound employee relations for managers and supervisors.
- On occasion, employees and managers differ in their perceptions regarding answers to important questions or employment policies. When that happens, guidelines and procedures have been established to provide employees and managers with tools to help evaluate and resolve the problem.

Grievance Resolution

- ***What is a grievance for a non-bargaining employee?***

A grievance is an alleged violation of policy and/or procedures. (See P&P 34101)

- ***What is a grievance for a bargaining employee?***

A grievance is an alleged violation of the CBA provision by Management.

Conflict Resolution Tips for Your Toolbelt

- Address concerns and issues in a timely fashion as they arise.
- Actively listen (recognize any potential biases).
- Use an even professional tone.
- Practice empathy.
- Focus on the behaviors/situation being discussed-separate from the individual.
- Know when to involve the HRIC or EELR.
- **Document** and recap the discussion with the employee(s) and any goals/outcomes/next steps discussed.
- Meet with your employees regularly to touch base.

Disciplinary Process

The disciplinary process should reflect the nature and gravity of the offense. This process includes:

- verbal reprimand
- written reprimand
- suspension
- termination

The Job Aid link for Disciplinary Action is on the MC website under- Disciplinary Action Workday Job Aid for Managers

Non-bargaining Employees

- 34002 Disciplinary Action and Suspension

The general purpose of disciplinary action is to correct improper performance or behavior, to provide clear notification when improvement is needed, and to hold employees accountable for their impact on the workplace. Employees whose behavior, actions or inactions are unacceptable are subject to disciplinary action.

- Reasons for Disciplinary Action

Internal Investigations

- **Violation of Policy or Procedure**

Some of the items that EELR typically investigates are: Title VI, Title VII, and Title IX allegations. In addition to those, we also investigate fraud/waste/abuse of resources, harassment, and retaliation.

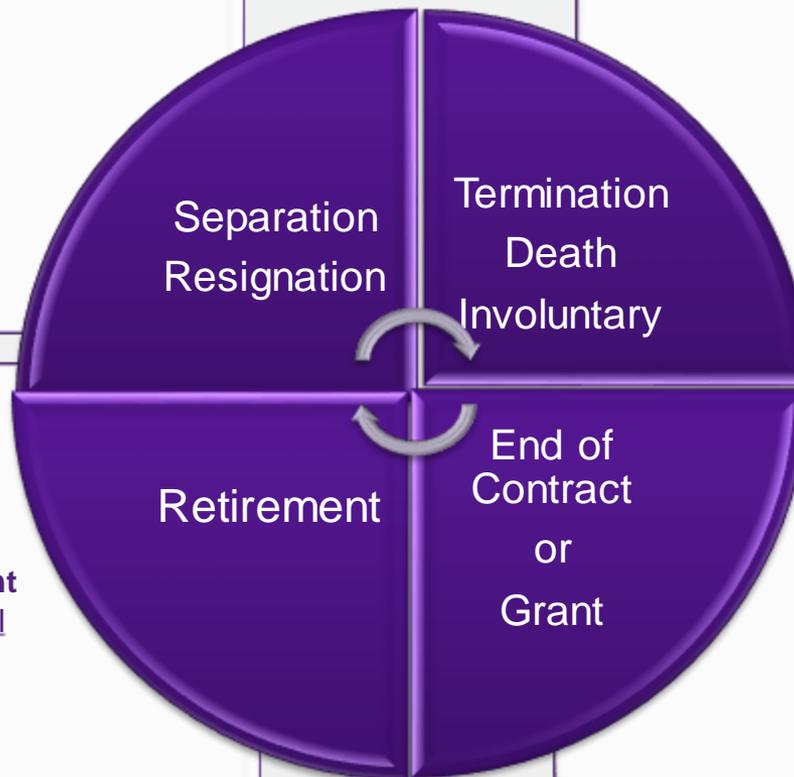
- **Ways to report issues/violations**

- **Supervisor**
- **HRIC**
- **Public Safety**
- **Ethics Point-(via phone or online) The case will be assigned to be addressed**
- **EELR**

Offboarding

- **Employee/Manager/ELR Initiates in WD**
- **Attach resignation letter/email**
- Manager clearance notification
- Exit Interview & Clearance
- Survey

- **ELR Initiates in WD**
- Manager will receive notification and clearance request



- **Employee contacts HR Benefits Dept./ Benefits Dept. will initiate retirement**
- **Attach retirement letter/email**
- ELR starts process
- Manager clearance notification
- Exit Interview & Clearance
- Survey

- **Employee/manager/ELR Initiates in WD**
- Class & Comp Letter
- Manager clearance notification
- Exit Interview & Clearance
- Survey

**Benefits Eligible Employees are:
Staff, Administrators, Chairs, FTF, Regular PTF, and Temp with Benefits**



SEPARATION CHECK OUT FORM

Name: _____ Resignation/Retirement Date: _____

Title: _____ Exit Interview Date: _____

MC ID: _____ Department/Campus: _____

Employee must obtain clearance from all the departments listed below. Effective 1/1/22 we are using Workday email notifications to request clearance from the list below, during exit interview, we will review and discuss the details of the email/notification responses

we received from the list below and will finalize time and place to return all The College assets.

Office of Human Resources and Strategic Talent Management, 9221 Corporate Blvd, Rockville, Maryland 20850

Department Clearance Sections	Confirmation	Date
<u>ACCOUNTS RECEIVABLE</u>		
Natalie Thompson - Outstanding balances	_____	_____
	Workday Notification	
<u>DEPARTMENT CLEARANCE*</u>		
Employee's Supervisor	_____	_____
Manuals, grades, uniforms, equipment, tools	_____	_____
	Workday Notification	
<u>OFFICE OF INFORMATION TECHNOLOGY</u>		
Phil Hawkins, Ext. 73066	_____	_____
Computers, Laptop, Blackberry, & other Equipment and Software	_____	_____
Becky Phillips - Cell Phone	_____	_____
	Workday Notification	
<u>PROCUREMENT</u>		
Patrick Johnson, Director of Procurement	_____	_____
P-card holder? <input type="checkbox"/> yes <input type="checkbox"/> no	_____	_____
Corporate card holder? <input type="checkbox"/> yes <input type="checkbox"/> no	_____	_____
	Workday Notification	
<u>LIBRARY (Nearest campus location)</u>		
Brandon Mollock, GT	_____	_____
Deborah Newman, TPSS	_____	_____
Mojisola Ahonsi, RV	_____	_____
Books, publications, videos, miscellaneous	_____	_____
	Workday Notification	
<u>Facilities (Nearest campus location)</u>		
Maurice McCambley, GT	_____	_____
Cade Mudgett, RV, HU/016	_____	_____
Cade Mudgett, TP/SS	_____	_____
Office Keys, Swipe Cards	_____	_____
Fitness ID (CT Building Employees Only)	_____	_____
	Workday Notification	
<u>MAILROOM</u>		
Jon Pointer, Mail & Duplicating Supervisor, HU009, RV	_____	_____
Faculty Mailbox Key	_____	_____
	Workday Notification	
<u>BENEFITS</u>		
Sue Redding, Insurance, CoBRA, Retirement	_____	_____
Lynette Evans, EAP	_____	_____
	Workday Notification	
<u>OFFICE OF HUMAN RESOURCES & STRATEGIC TALENT MANAGEMENT</u>		
separation@montgomerycollege.edu	_____	_____
Exit interview, ID Card, Name Badge, ADA Equipment, Survey Response	_____	_____
	Workday Notification	
<u>PARKING</u>		
Mark Pace, S223	_____	_____
Parking Passes & Citation Fees	_____	_____
	Workday Notification	
<input type="checkbox"/> Updating contact information (home address, phone) after separation. Send email to HRSTM with new contact information.		
<small>*If off-campus location, see supervisor for security clearance</small>		<small>Human Resources and Strategic Talent Management: GLR Date</small>

Separations & Action Items

▪ Employee

- Can initiate voluntary resignations
- Must attach in WD or email EELR/HR resignation letter/notice
- Must use future separation date in WD
- Complete offboarding survey
- Exit Interview and Clearance
- Must return all College assets to obtain clearance from the College by HRSTM dept.

▪ Manager/Direct Supervisor

- Transfer of knowledge
- Collect department resources
- Verify work area/office is cleared and clean
- Inform/contact EELR if employee should not be eligible to be considered for rehiring (EELR/HR will determine final decision)

Workday Separations Job Aid

Voluntary Separation

Employees

Submit Resignation



Manager

Voluntary Separation



2023 Off Boarding at MC

1/1/23 to 9/30/23

Total 2023 YTD

- 1/1/23-9/30/23
- 100 Benefits Eligible Employees

Reason

- 33 Retirement
- 3 Death
- 55 Voluntary Resignation
- 7 Invol/Termination
- 2 End of Contract

Position

- 23 FTF
- 77 Staff

Employee Engagement and Labor Relations



Thank you!



Back at **10:45** a.m.

Managing For Optimal Performance

Human Resources Internal Consultants

Lisa Evans **Takoma Park/Silver Spring Campus**

Leslie Jones **Germantown Campus**

Banessa Silva **Rockville Campus**

Managing For Optimal Performance

Learning Outcomes

- How to address performance issues
- Become familiar with the Performance Management cycle
- Resources for success

Addressing Performance Issues

- Guidance depends on bargaining or non-bargaining status of employee
- Each contract is different
- If not addressed in a collective bargaining agreements then follow the policies and procedures (for example supervisors are non-bargaining).

What Is Coaching?

A developmental activity in which a supervisor works one-on-one with someone in a coaching role to improve current job performance and enhance their capabilities for future roles or challenges.

Coaching vs. Counseling

- Coaching: is a function that helps employees **improve** their performance on the job by providing feedback.
- Coaching is a two-part process involving observation of employee performance and conversation focusing on job performance between the coach and the employee.

Why Coaching?

- The purpose of coaching is *to evaluate work performance on an ongoing basis* and encourage optimum work performance.
- Coaching provides ***regular feedback and support*** about employee's job performance and helps you to understand exactly what your employees need to know.
- It prevents small problems turning into big ones that may require much more attention later.

Performance Improvement Plan (PIP)

The purpose of the Performance Improvement Plan (PIP) is to define serious areas of concern and/or gaps in an employee's work performance, reiterate the supervisors expectations, and allow the employee an opportunity to demonstrate improvement. MC strives to encourage successful employees and foster strong working relationships through regular feedback and open lines of communication.

PIP Basics

- Discuss the employee and performance deficiencies with your HRIC or EELR representative.
- Enter the PIP into Workday.
- Schedule a time to meet with your employee.
- Monitor and assess progress.
- Complete the PIP and determine the next steps.

AFSCME

Their collective bargaining agreement identifies non-disciplinary actions that a supervisor can use to improve performance or correct violations of Montgomery College policy which include counseling, performance improvement plans, mandatory training, conflict resolution or other remedial actions.

Non-Disciplinary Actions

- Counseling
- Performance Improvement Plans
- Mandatory Training
- Other Remedial Action
- Conflict Resolution

Counseling

- Counseling should be used to afford an employee an early opportunity to address and correct a matter of concern that may lead to disciplinary action.
- Counseling is not discipline and a Union representative need not be present when counseling is provided.
- Follow up meeting with an email to the employee summarizing conversations and performance expectations.

Counseling Basics

- Be open, direct, informal
- Include details, provide specific examples of the problem
- Give the employee opportunity to share his/her side
- Work together to find a solution
- Schedule a time to evaluate progress
- Document your meeting for your own file

Mandatory Training

- Workday Learning
 - Internal content provided by ELITE
 - LinkedIn Learning
- External training through EAP or departmental funding

Conflict Resolution

- An employee may ask to engage in dialogue, coaching, mediated discussions, or other forms of conflict resolution in an effort to address concerns regarding the employee's performance.
- Resources available to assist through EELR or your HRIC.

Other Remedial Action

- Any other non-disciplinary actions other that are appropriate to correct an employee's inappropriate behavior or as a means of causing an improvement in performance before or after engaging in progressive discipline.

Managing For Optimal Performance

Policy 36001 Performance Evaluation and Employee Development

- Written evaluations are completed to meet the following general objectives of performance evaluation and employee development:
 - Keep employees informed of current job expectations, identify and document changes in responsibilities.
 - Identify performance objectives to increase the effectiveness and efficiency of the individual's job performance.

Managing For Optimal Performance

Performance Management @ MC

Types of evaluations used at MC

- 6 month evaluation (HRICs involved-support)

With regular coaching meetings

- 12 month evaluation

Facilitate regular coaching meetings – even when performance is strong.

Managing For Optimal Performance

Six Month Performance Evaluation

- One time evaluation after first 6 months on the job
- What is covered?
 - Performance expectations
 - Review of goals that were set during first week of employment
 - Recognition for what is going well
 - Recommended areas of improvement – gaps or weaknesses
 - Review of required training completion

Annual Evaluations

Components:

- Employee Self-Evaluation
- Supervisors Evaluation of Employee
- Establishment of Goals
- Ratings
 - Exceptional Performance, Exceeds Performance, Fully Meets Performance, Needs Improvement, Unsatisfactory Performance

2024 Goals Schedule

- **September/October 2023**- Enter Goals into Workday
- **January 2024**- Review of FY2024 goals
- **April 2024** - Review of FY2024 goals
- **June 2024** – Final review of goals

Note: Goals entered by employees are routed to the supervisor/manager for approval

Annual Evaluation

Suggested Guideline:

June 30, 2024 - Employee completes self-evaluation

July 30, 2024 - Supervisor completes employee's evaluation

August 1, 2024 - Supervisor schedule meetings with employee to review evaluation

August 16, 2024 – Employee and supervisor acknowledge evaluation and submit

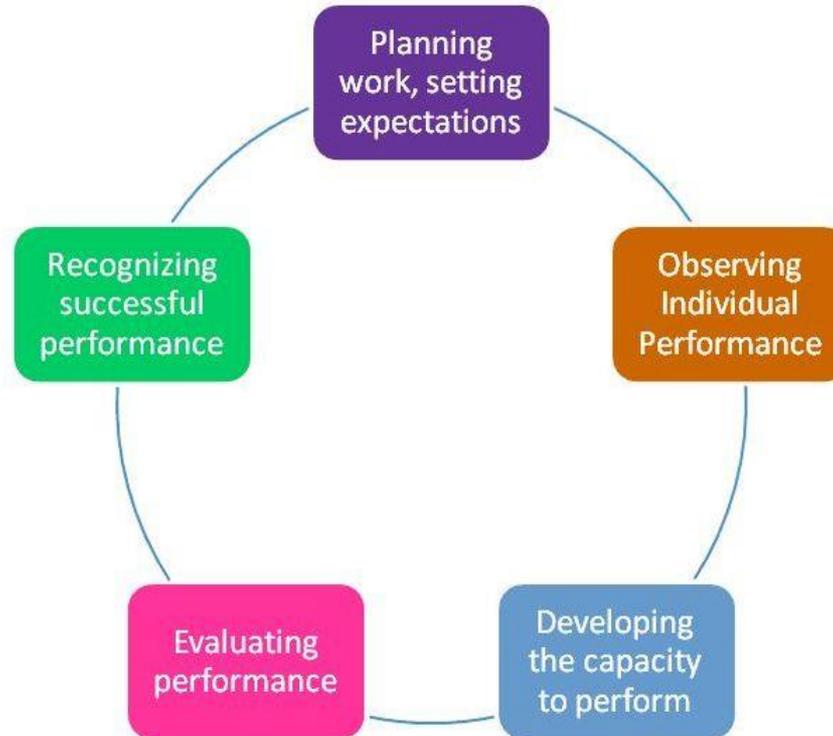
Online Resources

- Workday Training
 - General Navigation Video
 - Talent and Performance Job Aids
- Utilizing the HRSTM Performance
 - Rating Categories
 - Competencies

2024 Annual Performance Evaluations

- There will be timely communications about the 2024 Performance Evaluation cycle.
- We offer training for all supervisory staff of the evaluation process.
- Your HRIC will assist in answering your questions you may have on this topic.

Performance Management Cycle



Performance Goals

Performance goals are short-term objectives that an employee is expected to achieve within a set period of time. These goals are usually attached to specific job positions and are determined after considering the tasks and duties an employee is required to perform in that position. Performance goals are often a subset of and add up to overall College goals. They let employees know what is expected from their position.

Developing Performance Goals

- Strategic plan
- Cascade from MC leadership to your unit's management
- Support the work of the college

Developing your Performance Goals

- Talk with your supervisor about your goals
- Consider MC's goals and those of your unit to connect with the mission and strategy of MC
- Work collaboratively with your supervisor to begin drafting your goals
- Confirm agreement and enter your goals in Workday

Professional Development Goals

Professional development goals are objectives you can set for yourself to help further your career. These might include taking steps to learn relevant skills, expand your professional network, or find more satisfaction at work.

Professional Development Goals

- Give you an idea of your vision for your future
- Help you enhance existing workplace skills
- Improve productivity
- Encourage continual growth and life long learning
- Helps you to take advantage of the benefits MC offers

Examples of Professional Development Goals

- Learn a new skill
- Expand your education
- Build your soft skills
- Develop leadership skills

Entering Goals in Workday

Find Info:

- Search for Workday
- Workday@MC Resource Site
- Talent and Performance Management
- Manage Goals Job Aid

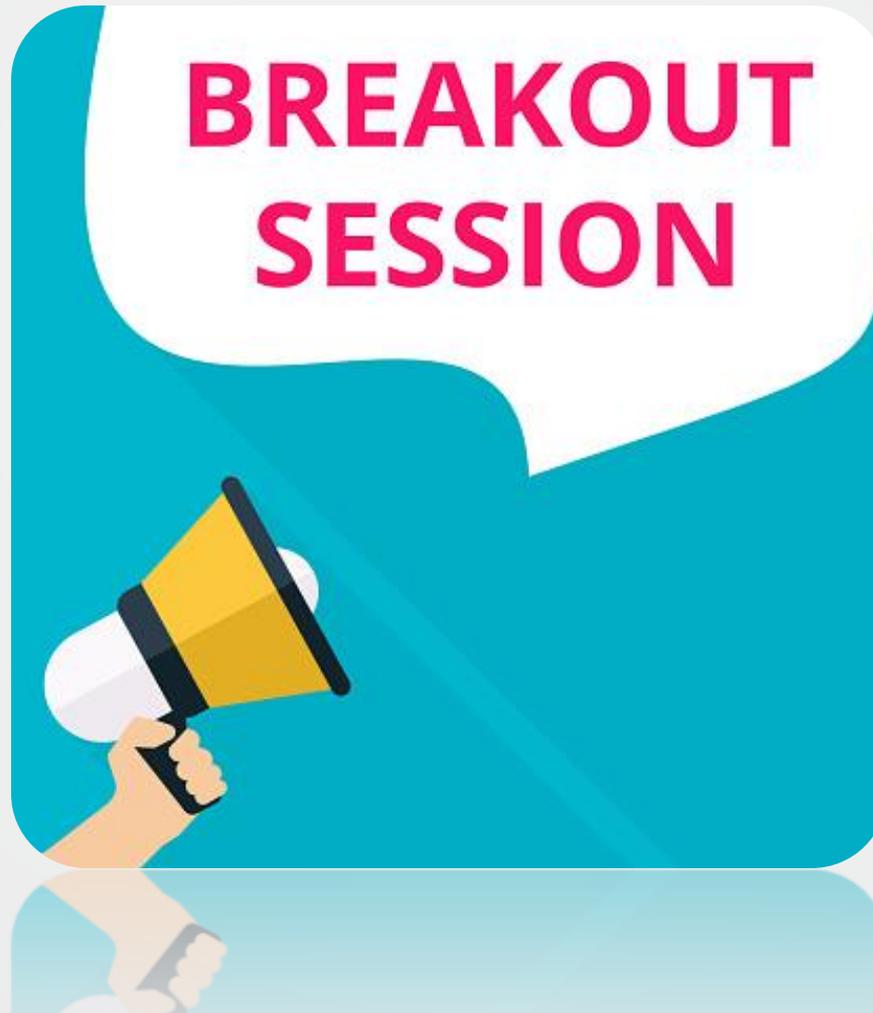
Additional Trainings

- The course **Goal Setting** is available through Workday/Internal.
- The course **Successful Goal Setting** is available through Workday/LinkedIn Learning.
- **Defining and Achieving Professional Goals** is available through Workday/LinkedIn Learning.

Managing For Optimal Performance

MC2025 Goal V: Invest in Our Employees

Managing For Optimal Performance



Counseling Session Practice

Instructions:

- For each scenario, the observer/coach will read both roles
- The supervisor and employee will just receive their role description.
- The supervisor should plan the conversation before beginning
- Outline talking points, describe what change/improvement is needed.

Counseling Session Practice (cont.)

- The role play will begin with the supervisor opening the meeting
- Allow 5-7 minutes for discussion
- The supervisor can call a time out to “consult” with their coach
- At the end of the discussion the supervisor and employee will give feedback about how it went.
- The coach will offer their feedback as well.
- Debrief this scenario by discussing why it was done and how it relates or can be applied to real life or the job.

Managing for Optimal Performance



Thank you!



Back at 12:45 p.m.

Procurement 101

Understanding the Procurement Process

Yu (Judy) Zhu
OBS - Procurement
October 25, 2023

Procurement Website:

<https://www.montgomerycollege.edu/procure>

Procurement 101

This overview will cover the following topics:

- Our Mission
- Your Role in the Procurement Process
- The Procurement Process for Buying Goods and Services
- Ordering Methods/Thresholds
- Other Important Information
- Q&A

Mission

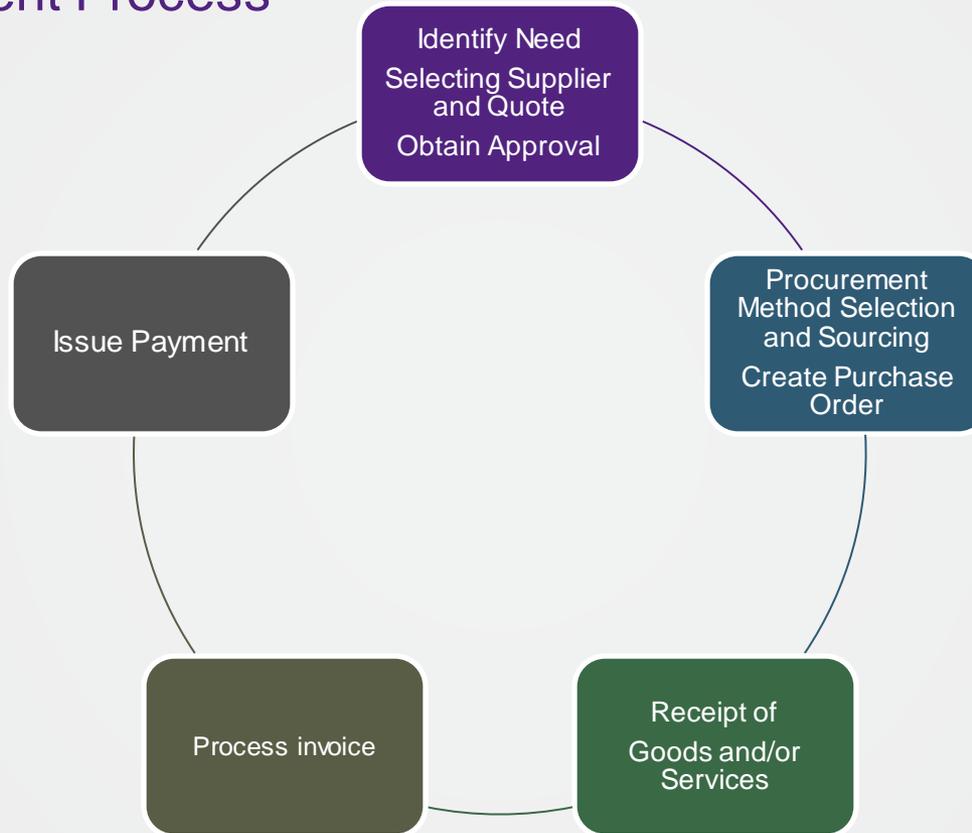
The Office of Procurement is a service unit within the Office of Business Services. Our office strives to add value, quality, and satisfaction in the delivery of goods and services in accordance with the Board of Trustees policies and procedures, local laws, and regulations.



Your Role in the Procurement Process

1. **Adhere to all Board of Trustees Policies and Procedures.** Your needs can be better met when we collaborate together to execute the procurement procedures. We are here to serve you, and we need your help and cooperation to do so.
2. **Buy responsibly.** Taxpayers and students count on us to demonstrate fiscal integrity.
3. **Use approved purchasing methods.** Before committing the College to pay for supplies, services, and equipment.
4. **Plan ahead** to avoid last-minute purchases and rush orders, which generally cost more. Industry lead times vary by what you are buying. Keep Procurement advised of your future needs (especially large-dollar value projects).
5. **Let us know when you have questions or concerns.** We will be happy to meet with you as you plan your requirements.

Procurement Process



Ordering Methods

- **Purchase Order (PO):** A legally binding contract committing College funds. It is prepared and executed by the Purchasing Agent and sent to the vendor to buy requested goods and services.

Purchase Requisition–Workday Self Service (Electronic Requisition):** It is an **INTERNAL** document to initiate request to procurement for goods or services you need. In Workday, requisitions will be used to initiate the buying process. **Be sure to have all related supporting documentation uploaded in Workday as an attachment (e.g. vendor quotes, proposals, special purchase request, contract etc.). Upon receipt of the RQ, Procurement will review all ad hoc good and services requests to ensure all the details including supporting documents provided. Prior to RQ entry, be sure to have all related supporting documentation uploaded in Workday as an attachment (e.g. vendor quotes, proposals, special purchase request, contract etc.). For a new vendor, obtain a vendor w-9 and create a supplier, refer to the Create Supplier Request job aid. If you have questions, please contact the Procurement Office. procure@montgomerycollege.edu

- **Purchasing Card (P-Card):** A VISA credit card issued by M&T Bank, which has been contracted by the College to provide a flexible, convenient method for authorized College requestors to buy small-dollar value goods according to established guidelines.

Thresholds

Although some purchases may be made directly by departments, many must be processed by Procurement due to their dollar value, funding source or the nature of the purchase.

College procurements use one or more of the following methods:

1. Open Market Procurement (contracts and purchases up to \$10,000)
2. Small Procurement (contracts and purchases between \$10,001 and \$25,000) shall be procured competitively with at least three valid price quotations from three different vendors.
3. Competitive Sealed Solicitation (over \$25,000) Bid
4. Special Procurements (sole source request, emergency, PTOA) Sole Source purchases between \$10,001 and \$99,999 require approval by the Director of Procurement, \$100,000 and above require College board approval.
5. Purchasing Card (Pcard) \$5000 credit limit (single transaction limit is \$4999) Purchasing cards cannot be used to purchase IT related items, services or furniture. For additional information refer to “Purchasing Card Users Guide”.
 - Section 5.2 Allowable Purchases for College-related business
 - Section 5.3 Prohibited Purchases



MONTGOMERY COLLEGE

OFFICE OF PROCUREMENT BUYER COMMODITY ASSIGNMENT LIST (Updated 10/9/2023)

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TEAM 4 & 6

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Architectural/Engineering Services
Building Renovation/Major Repairs/New Building Construction Services
Consulting & Training Services (Facilities-related)
Elevator Modernization/Repair/Maintenance Fire System Monitoring, Testing, Inspection & Repairs
Fuel (Heating oil, Gasoline & Diesel)
Goose Management
Hazardous Waste Disposal
Parking Management Paving Services
Pest Control
Property Lease/Rental
Trash/Refuse Removal
Utilities & Energy Related Services
Water Treatment Services

Art Supplies (MCPS orders) and Equipment Asset Management Services (Facilities) Athletic Supplies/Equipment/PE/Maintenance
Course/Admission-related Testing Material/Services Events, Event related Contracts & Tickets Food/Catering (Other food service non- Metz)
Gases/Glass/Industrial Oxygen
Gift Cards
Honoraria
Professional Development Training/Consulting
Promotional Items/ Awards/Plaques Sponsorships
Theatre Arts Supplies/Contracts & related -Services
Uniforms/Apparel
Vehicles, Auto Parts/Supplies, & Services
WDCE- Contract related-Services

Building
Materials/Services/Supplies
Document Shredding Services
Electrical Supplies/Services
Facility Services (Carpet, Painting, Upholstery & Others)
Facilities-related equipment and tools
Furniture
Heating/Air Conditioning
Supplies/Services Janitorial
Supplies/Equipment/Services
Landscaping Equipment/
Supplies/Services Locksmith Services & Locks Moving/Mobile Trailers
Plumbing Supplies/Services
Signage
Snow Removal

TEAM 5

Cherree Adams, CMRP, Purchasing Manager
Cherree.Adams@montgomerycollege.edu
Phone: 240.567.5285

Lisa Dyer, CPCP, Purchasing Agent I
lisa.dyer@montgomerycollege.edu Phone: 240.567.3183

Amazon Business Account Administrator Audiovisual Supplies/Equipment/Maintenance Auxiliary Enterprise
Cable & Broadband Services
Communication (Cabling (Data & Voice), Pagers, Radios, Telephones)

Books, DVDs/Periodicals/Subscriptions
Bottled Water Service
Compliance-related Training
Conference/Registration
IT Asset Disposal
IT Computer Hardware & Peripherals



MONTGOMERY COLLEGE

OFFICE OF PROCUREMENT BUYER COMMODITY ASSIGNMENT LIST (Updated 10/9/2023)

<p>Copier Equipment Leases/Print Management Services Financial Services (Actuarial, Auditing, Banking) HRSTM (Human Resources-related Services) Interpreting/Translation Services IT Contracts & Services/Enterprise Systems Mail Equipment Supplies/Postal Services Medical/Radiologic/Supplies & Equipment Office Supplies & Equipment/Maintenance P-Card Administration Records Management Scientific Lab Supplies/Equipment/Maintenance Security Camera Equipment & Services</p>	<p>IT-related Training/Certifications Library Supplies/Contracts/Services MCTV (Montgomery College Television) Memberships Musical Instruments/Equipment/Maintenance Photographic Supplies/Equipment and Services Safety and Emergency Management Services</p>	
<p>William Valentin, Purchasing Specialist @montgomerycollege.edu Phone: 240.567.5391</p>	<p>Chiquita Manago-Haywood, Purchasing Agent II chiquita.manago@montgomerycollege.edu Phone: 240.567.5289</p>	
<p>Amaزون Business Account Services eMaryland Marketplace Advantage (eMMA) site Administrator Purchasing/Corporate Card Services Web site Management</p>	<p>Advertising & Marketing Services Business Cards and Stationery (Letterhead and Envelopes) Commencement & Related Services Courier & Delivery Services Food Service Contract-Metz Culinary Management Hood System Inspection for Kitchens and Laboratories IT Software (Licensing/Subscriptions) Kitchen Supplies/Equipment/Maintenance Marketing Services Portable Restroom Rentals Printing, Design, & Layout (Printed Materials) related Services Reservations (Hotels, Space) Individual & Group Transportation Services Travel Services for Athletics</p>	

Create Supplier Invoice (Direct Payment)

Non-Procurement function. Convenient payment method for subscriptions, memberships and other eligible transactions up to \$10,000. These requests routed to Accounts Payable directly and transactions are paid directly from general ledger accounts through the Accounts Payable.

Create supplier invoice request can be used for:

- Subscriptions and membership (up to one year with no auto-renewal)
- Sponsorship and honoraria up to \$10,000
- Delivered goods with total amount less than \$10,000 and each unit price less than \$4,999
- Completed services up to \$10,000

Supporting documents, such as executed contract, invoice, shipping documents etc. must be uploaded in workday when create supplier invoice request. Be sure to email Account Payable with the Supplier Invoice Number once completed.

Supplier Invoice Request cannot be used:

- Recurring purchase of goods and services
- Goods, where the unit price is greater than \$4,999
- Any grant purchases regardless of the dollar amount
- Any purchase with vendor's terms and conditions subject to the legal review and approval.

Popular Collegewide Contracts

- **Office products and supplies - Rudolph's Office and Computer Supply** (contract valid through 6/30/2025).
- **College business cards & envelopes and stationery - Envelopes and Printed Products, Inc.** (contract valid through 7/18/2028)
- **Furniture – Duron, Inc.** Every request for furniture (except for ADA accommodation) must be reviewed and approved by the Central Facilities Office prior to purchase. (Contract valid thru 12/31/2023).
- **Food/Catering - Metz Culinary Management.** Any on campus food/catering services not using Metz must be approved by Director of Auxiliary services in advance.

Amazon Business Account

Montgomery College has created a centralized Amazon Business account that will streamline the way we do business with Amazon. Work-related Amazon spending should be conducted through an official Montgomery College Amazon Business account.

- Through Amazon Business, you will have immediate access to:
- Free standard shipping(5-8 business days) on eligible orders over \$25
- Business pricing and quantity discounts on a growing selection of items
- Enhanced search and browse functionality
- Access to a specialized Customer Service team for business customers only

Everything else you know and love about shopping on Amazon.com will remain the same. If you are not already registered, please email: procure@montgomerycollege.edu to request an invitation to join the Montgomery College Amazon Business Account.

Central Receiving & Surplus Property

Office Hours: 7:30 a.m. to 4 p.m.

Central Receiving & Surplus Property under Office of Facilities is the primary recipient of mail and packages for goods. When necessary, Procurement will be modifying the Ship To address in the final PO.

Address: 7602 Standish Place, Rockville, MD 20855

Phone: 240-567-5282

Contact: James Fowlkes, Warehouse Supervisor

Office of Procurement Contact Information

Central Services Bldg.

9221 Corporate Blvd

Rockville, MD 20850

➤ **Website:** <https://info.montgomerycollege.edu/offices/procurement/index.html>

➤ **Email Address:** Procure@montgomerycollege.edu

➤ **Telephone Number:** 240 567-5292

➤ **Fax Number:** 240 567-6397

Questions & Answers

Question 1: What should I watch for when reviewing P-card transactions?

- Answer:**
- (1) Review the User Guide and familiarize themselves with allowable and prohibited purchases.
 - (2) Cost Center managers should be reviewing things like Fund, Program and Spend Category. Receipts/invoices and shipping documents, no sales tax charged to the college.
 - (3) Ensure p-card holder is submitting verifications for approval by the 10th of every month
 - (4) Ensure adherence to record-retention policy. P-card holder need to keep adequate records of verification approvals, for 5 years.

Budget Overview for Supervisors

Office of Business Services

Linda Hickey
Budget Director

Presentation Overview

- Budget definition & purpose
- Annual budget development process
- Budgets at Montgomery College
- Operating fund revenue sources
- Operating fund expenditures
- Unit budgets

Budget Definition & Purpose

- What is a budget?
 - A plan for an organization's outgoing expenses and incoming revenues for a specific period of time.
- What is the purpose of a budget at the College?
 - Plan, track, and control spending.

The purpose is to ensure that spending follows a plan, stays within preset limits, and does not exceed available funds.
 - Support funding requests.

The purpose is to justify funding requests by showing how funds are used.

Annual Budget Development Process

- **July to October – Budget Development**
- November to January – Senior Leadership and Board Review
- January – Budget Sent to County Executive and Council
- March – County Executive Releases Budget
- April/May – County Council Discussion
- May – County Council Adopts Budget
- June – Board of Trustee Adopts Budget

Budgets at Montgomery College

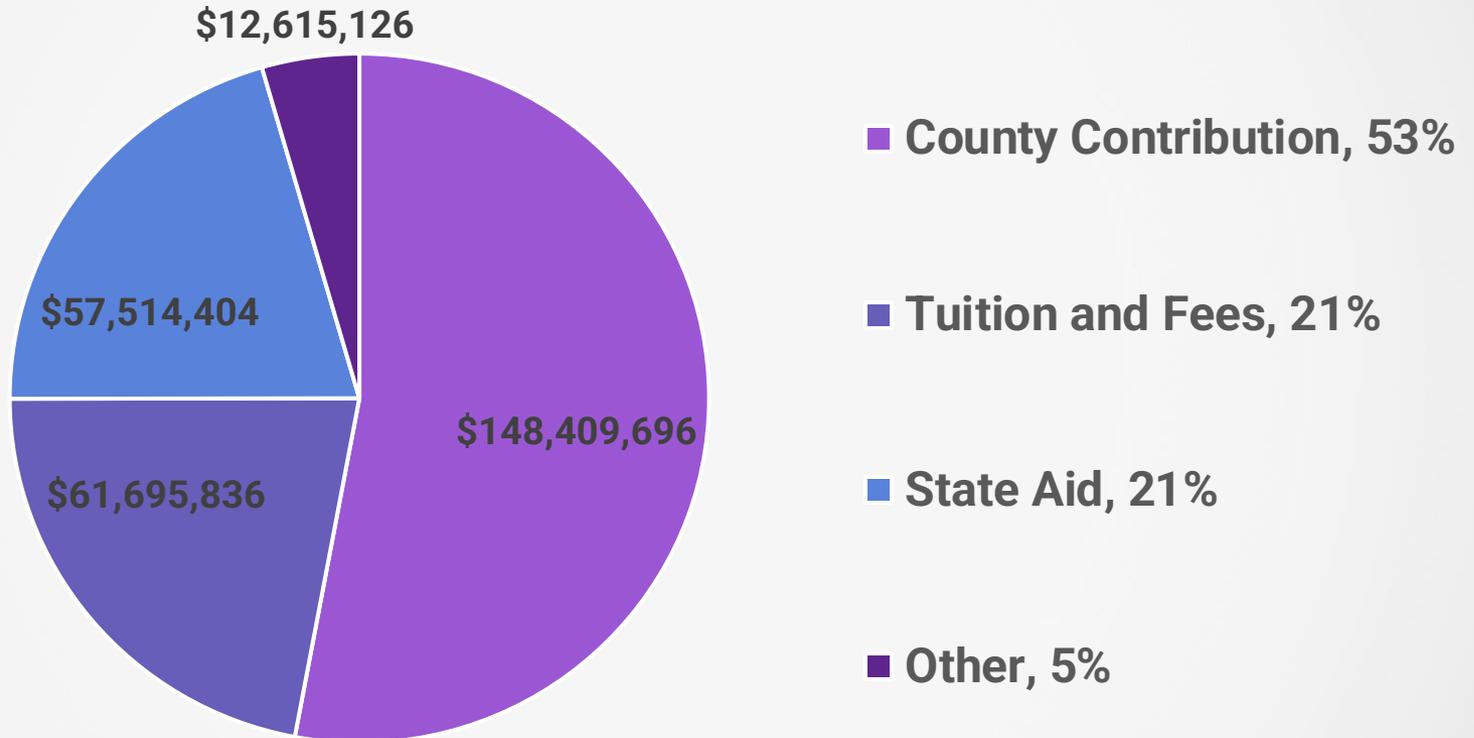
- Operating Fund aka Current Fund*
- Emergency Plant Maintenance and Repair Fund*
- County Grant Fund*
- Workforce Development and Continuing Education Fund
- Auxiliary Enterprises Fund
- Transportation and Major Facilities Reserve Fund⁺
- Federal, State, and Private Grants
- MC 50th Endowment Fund
- MC Cable TV
- Capital Fund

*Tax supported by County Residents

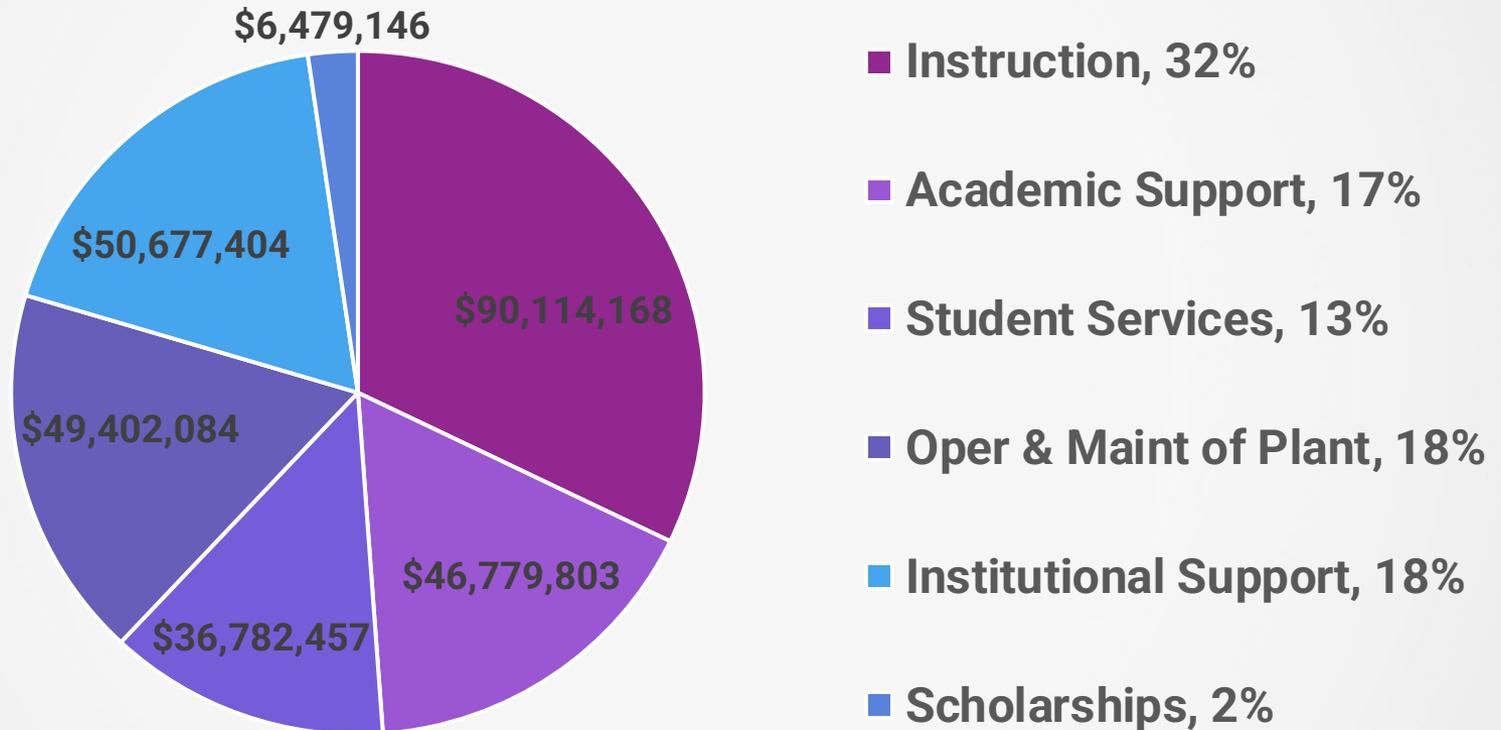
⁺Supported through student fee

Operating Fund Revenue Sources

FY24 Budget

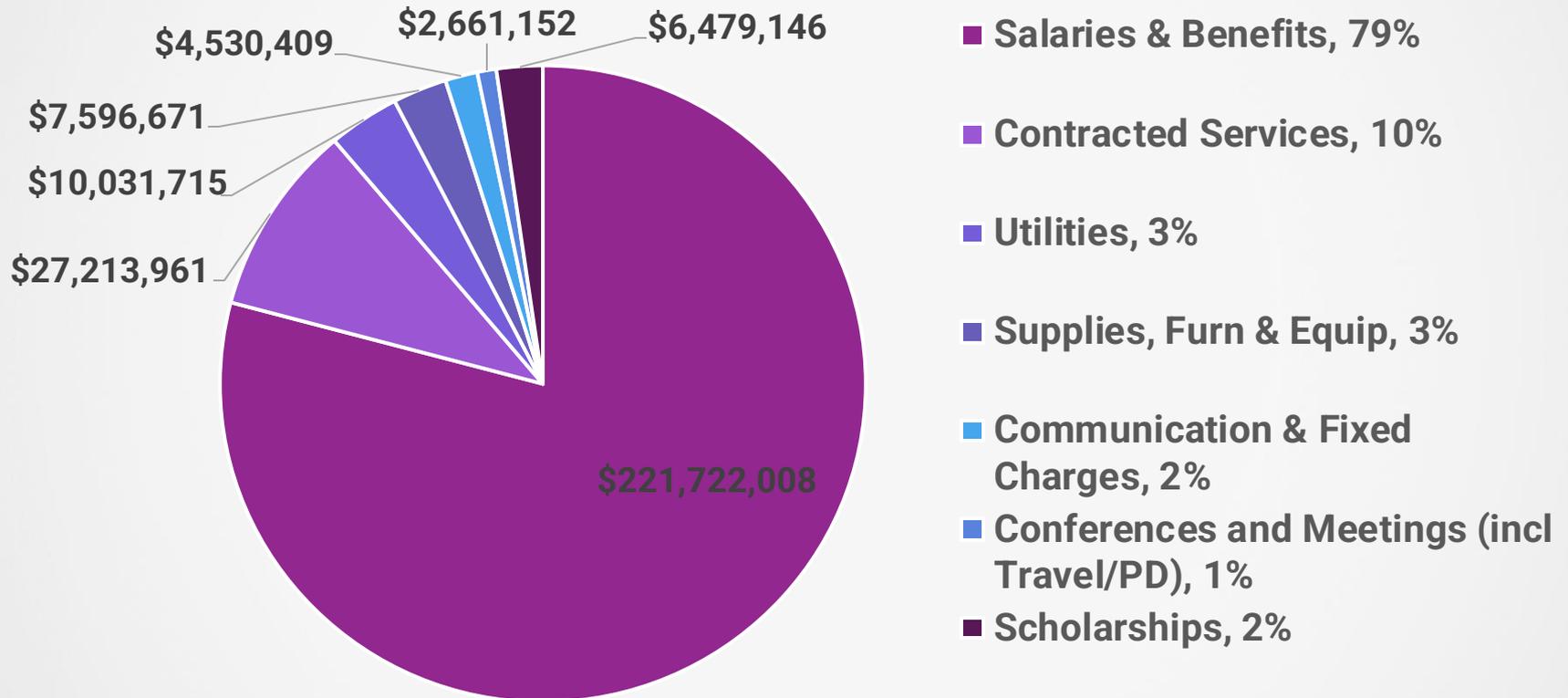


Operating Fund Expenditures by Function FY24 Budget



Operating Fund Expenditures by Object

FY24 Budget



Unit Budgets

- Determined by a FOAP account structure
 - F is for Fund
 - O is for Organization – (Cost Center Workday)
 - A is for Account – (In Workday funds are budgeted at ledger account)
 - P is for Program – (aka function)
- When is it necessary to do a Movement of Fund (MOF)
 - Select salary accounts to non-salary accounts or vice versa
 - MOF can only occur between like funds

Unit Budgets (cont.)

- Responsibilities in managing an unit budget
 - Responsible for managing the transactions
 - Recording the transaction in the correct account & program
 - Following procurement guidelines
 - Responsible for ensuring that accounts are not overspent
 - Exception: Budget position accounts (5001,5101 and 5301) and instructional salary accounts (5102, 5111/12, 5130/31)
 - Non salary accounts may have situations where accounts are overspent and others are underspent just so in total not salary accounts are not overspent.

Questions





Back at 1:45 p.m.



FY24 EAP Guide for Supervisors

Key guidance and information
to ensure proper EAP review and approvals

Office of Human Resources and Strategic Talent Management
Updated October 2023

Purpose of the EAP Guide for Supervisors

- The information in this guide is meant to be used as a supplement to the more comprehensive EAP Resource Guide, which all eligible employees should read and understand before requesting EAP/PDAP benefits, and [College Policy and Procedure 35001, Compensation Programs](#).
- Supervisors cannot effectively understand or manage the EAP process with information in this guide alone.
- HRSTM needs supervisors to be strategic partners in the administration of EAP benefits. Please familiarize yourself with the guide and PandP so you can be an additional resource to your team and to ensure accurate and timely processing of EAP requests.

What is EAP?

- The Educational Assistance Program (EAP) offers a offers financial assistance for a variety of professional development activities, programs, and services and work-related travel for full-time faculty, administrators, and staff.
- Criteria for EAP is that the activity should help employees:
 1. Improve job-related knowledge and skills to perform more effectively in current job,
 2. Complete a job-related degree-seeking or certification program, and/or
 3. Prepare for a different or higher-level job at the College.
- **Employees can use Tuition Waiver for any MC credit course**, even if not related to the current position.
- EAP can be used for eligible travel expenses (additional funds) and wellness.

What is EAP?

- Many employees have personal passions and have entrepreneurial endeavors outside of work for the College, but it is not appropriate to use EAP for personal hobbies or to promote another business.
- **EAP events must be in support of and service to your role at the College, NOT a personal business.**

What is PDAP?

- The Professional Development Assistance Program (PDAP) offers financial assistance for a variety of professional development activities, programs, and services for bargaining part-time faculty.
- Criteria for PDAP is that the **Non-MC activity** should help employees:
 1. Improve job-related knowledge and skills to perform more effectively in current job,
 2. Complete a job-related degree-seeking or certification program, and/or
 3. Prepare for a different or higher-level job at the College.
- **PDAP can be used for any MC credit course**, even if not related to the current PTF discipline, eligible travel expenses, and wellness. PTF are not eligible for Tuition Waiver (employees or dependents).

EAP/PDAP Eligibility

- After **completion of six (6) months of employment**, the following employees are eligible for EAP benefits:
 - Full-time faculty, administrators, and staff
 - Full-time temporary staff with benefits
 - Part-time staff are eligible on a pro-rated basis (*i.e.*, 1/2 time = 1/2 benefit)
- Bargaining part-time faculty **that have worked at least nine (9) ESH over the course of two (2) academic years** are eligible for PDAP benefits.
- Non-bargaining part-time faculty, casual temps, and student workers are not eligible for EAP/PDAP benefits.

FY24 EAP Allocations

	Part-time Faculty	Full-time Faculty	Bargaining Staff	Non-Bargaining Staff
EAP/PDAP/employee	\$1,250	\$3,120	\$2,800	\$2,500
EAP Travel/employee		\$1,375	\$1,250	\$1,250
Total EAP/PDAP Budget	\$54,000	\$481,522	\$400,000	\$803,798
Total EAP Travel Budget		\$193,850	\$50,000	\$141,650

FY24 EAP Tuition Limits

- Montgomery College will cover the cost per credit taken equal to the University of Maryland, College Park credit rate for in-state tuition and fees for undergraduate or graduate coursework, not to exceed twelve (12) credits in a fiscal year.
- For current UMD undergraduate and graduate Tuition and Fees, visit <https://billpay.umd.edu/costs>.

	In-State Tuition, up to 12 Credit Hours	Mandatory Fees for 9+ Credits (flat rate)	Total FY EAP Tuition Limit/ Overall Max EAP FY24 Limit
Undergraduate	\$4,944.50	\$808.00	\$5,752.50
Graduate/ Doctoral	\$9,936.00	\$641.50	\$10,577.50

EAP Request Workflow

I need MC to pay the Supplier
for my eligible EAP expenses,
EXCEPT for EAP Travel, Wellness, and PDAP
which are reimbursement only.



Step 1: Create Requisition
(choose **Service**)



Step 2: Once Requisition is **APPROVED,**
Create Receipt (next business day)



Upon final approval, by the Manager **AND** the EAP Partner, AP processes payments weekly.
If approved by Wednesday, payment will be included in Thursday check run for Friday.

-- **Search My Requisitions** to confirm approval or payment status (Invoicing Status: Fully Invoiced or Paid).
-- Payment is mailed to Supplier according to invoice/instructions.

I already paid or will pay for my eligible EAP,
PDAP, Wellness, and/or EAP Travel expenses
and
I need MC to reimburse me.



Step 1: Create Spend Authorization
(not required for Wellness – go to Step 2)



Step 2: Once Spend Auth is **APPROVED,**
Create Expense Report (immediately)



-- **View Expense Reports** to confirm approval or payment status (Status: Approved or Paid).
-- Deposit is made according to Payment Elections in ESS as a separate deposit (not included with payroll).

Contact **Accounts Payable** for questions related to payment (*i.e.*, status of payment, if payment has not processed or been received timely).

Workday EAP Request Demos

- I need MC to **Pay the Supplier:**

- Demo Videos:

- [**Create Supplier Request \(Total Time 3:32\)**](#) (if applicable)

- [**Step 1 of 2: Create Requisition \(Until 9:57\) and Step 2 of 2: Create Receipt \(Total Time 12:23\)**](#)

- I need MC to **Reimburse Me:**

- Demo Video:

- [**Step 1 of 2: Create Spend Authorization \(Until 10:37\) and Step 2 of 2: Create Expense Report \(Total Time 15:08\)**](#)

What is a Supervisor's role in EAP?

- **Talk about Professional Development**

- Discussing Professional Development and career goals should be happening on a regular basis.
- **Socialize the idea of how EAP and professional development go hand in hand.**
- Support your team by suggesting applicable content that can assist them with reaching their goals and how to use EAP benefits to achieve those goals.

What is a Supervisor's role in EAP?

- **Learn and understand the process**
 - Take advantage of the EAP resources available to all employees and understand the rules and the process for requesting EAP funds.
 - **Ensure your staff is accessing EAP resources and that they understand the rules and the process for requesting EAP funds. Direct staff to the available resources if they have questions.**
 - Do not offer or promise EAP benefits to employees for ineligible events.

What is a Supervisor's role in EAP?

- **Follow the rules and look carefully at what you are approving**
 - Please do not blindly approve EAP requests.
 - **All EAP requests should be reviewed for accuracy and eligibility BEFORE approval by a supervisor.** For example, make sure the request itself is eligible and that the justification and documentation are complete and appropriate.
 - Ask yourself, “Would I pay for this from my department budget if necessary?” When in doubt, contact [EAP Requests](#) before approving.
 - HRSTM will send back ineligible requests or requests missing key information, which may delay payment to vendors or employees.

What is a Supervisor's role in EAP?

- **Reinforce and socialize the concept of a shared benefit**
 - Though employees are allowed up to a set amount, EAP is limited to an overall FY benefit for applicable employee groups.
 - This means that:
 - **Not everyone can participate at the per employee limit. Help shift employees' mindset from entitlement to eligibility.**
 - Everyone has a vested interest to ensure that these funds are being used appropriately and efficiently so that the maximum number of eligible employees can participate.
 - Use of funds should be tied to Professional Development, continuing education or credential requirements, and/or department performance goals.

EAP Training and Resources

- [HRSTMEAP Page](#)

- General EAP info
- Allocation and utilization data by employee type and bargaining status for the applicable fiscal year
- FAQs

- [Workday Training Page](#)

- Job aids and recordings

- [HRSTM Forms Page](#)

- EAP Forms for MC Courses

Additional EAP Support

- **Contact EAP Requests for Personal EAP Help Sessions and with general EAP inquiries**
 - EAPRequests@montgomerycollege.edu



FY24 EAP Resource Guide

Your Toolkit for EAP and PDAP Information,
Workday Guidance, and Support Resources

Office of Human Resources and Strategic Talent Management
Updated October 2023

Purpose of the EAP Resource Guide

- The EAP Resource Guide is meant to provide detailed information and resources for all eligible employees regarding all aspects of the EAP and PDAP process.
- This guide is organized into sections by EAP topic so users can easily review the entire guide, or jump directly to a specific section they need. The Table of Contents and each section page have links to the applicable slides for the users' convenience.
- Some content is relevant to multiple sections and is intentionally repeated.
- Supervisors should review and refer to the EAP Resource Guide and the EAP Guide for Supervisors for a comprehensive understanding of the program and their responsibilities in the EAP process.

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- EAP/PDAP Defined and Eligibility – [Slide 94](#)
- EAP/PDAP Request Types and How to Process – [Slide 98](#)
 - FY24 EAP Allocations – [Slide 104](#)
 - FY24 Tuition Limits and Tax Implications – [Slide 107](#)
 - Submission Deadlines and Guidance – [Slide 111](#)
 - Eligible and Ineligible EAP Expenses – [Slide 116](#)
- EAP Travel Guidance (domestic and international) – [Slide 123](#)
- Preparing for and Processing your EAP Request – [Slide 130](#)
 - Most Common Mistakes – [Slide 145](#)
 - Demo Videos and Resources – [Slide 149](#)

EAP/PDAP Defined and Eligibility

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What is EAP?

- The Educational Assistance Program (EAP) offers financial assistance for a variety of professional development activities, programs, and services and work-related travel for full-time faculty, administrators, and staff.
- Criteria for EAP is that the activity should help employees:
 1. Improve job-related knowledge and skills to perform more effectively in current job,
 2. Complete a job-related degree-seeking or certification program, and/or
 3. Prepare for a different or higher-level job at the College.
- **Employees can use Tuition Waiver for any MC credit course, even if not related to the current position.**

What is EAP?

- Many employees have personal passions and have entrepreneurial endeavors outside of work for the College, but it is not appropriate to use EAP for personal hobbies or to promote another business.
- **EAP events must be in support of and service to your role at the College, NOT a personal business.**

What is PDAP?

- The Professional Development Assistance Program (PDAP) offers financial assistance for a variety of professional development activities, programs, and services for bargaining part-time faculty.
- Criteria for PDAP is that the **Non-MC activity** should help employees:
 1. Improve job-related knowledge and skills to perform more effectively in current job,
 2. Complete a job-related degree-seeking or certification program, and/or
 3. Prepare for a different or higher-level job at the College.
- **PDAP can be used for any MC credit course**, even if not related to the current PTF discipline, and eligible travel expenses. PTF are not eligible for Tuition Waiver (employees or dependents).

EAP/PDAP Eligibility

- After **completion of six (6) months of employment**, the following employees are eligible for EAP benefits:
 - Full-time faculty, administrators, and staff
 - Full-time temporary staff with benefits
 - Part-time staff are eligible on a pro-rated basis (*i.e.*, 1/2 time = 1/2 benefit)
- Bargaining part-time faculty **that have worked at least nine (9) ESH over the course of two (2) academic years** are eligible for PDAP benefits.
- Non-bargaining part-time faculty, casual temps, and student workers are not eligible for EAP/PDAP benefits.

EAP/PDAP Request Types & How to Process

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EAP Request Types

- EAP request types for FTF and Staff:
 - Non-MC courses, required books, seminars, memberships, etc. and EAP Travel are processed via **Workday**. EAP Travel is always reimbursement only.
 - Required MC books and fees and MC non-credit courses (WDCE) are processed by **emailing** EAPRequests@montgomerycollege.edu.
 - Wellness is processed via **Workday** (Expense Report only). Wellness EAP requests are always processed as reimbursement only and are taxable.
- MC credit courses are processed via **Tuition Waiver** (employees and dependents).

PDAP Request Types

- All PDAP requests for are processed as **reimbursement only**:
 - Non-MC courses, seminars, memberships, etc. and eligible travel expenses are processed via **Workday**.
 - MC credit courses are processed via **Workday**. PTF are not eligible for Tuition Waiver (employees or dependents).
 - Wellness is processed via **Workday** (Expense Report only). Wellness EAP requests are always processed as reimbursement only and are taxable.

EAP Request Process in Workday

- Aside from changing from a paper process to an online process in Workday, the overall process to request EAP benefits is the same. In other words, the *how* has changed, but the *what* for the most part has not.
- Employees are required to provide the following information and documentation about their EAP activities:
 - Name, type, and start and end dates of activity
 - Vendor providing the activity
 - An acceptable justification how the activity meets the EAP criteria
 - Total dollar amount of the activity
 - An invoice and/or receipt documenting the details and cost
 - Proof of completion and satisfactory grade (if applicable)

EAP Request Workflow

I need MC to pay the Supplier
for my eligible EAP expenses,
EXCEPT for EAP Travel, Wellness, and PDAP
which are reimbursement only.



Step 1: Create Requisition
(choose **Service**)



Step 2: Once Requisition is **APPROVED,**
Create Receipt (next business day)



Upon final approval, by the Manager **AND** the EAP Partner, AP processes payments weekly.
If approved by Wednesday, payment will be included in Thursday check run for Friday.

-- ***Search My Requisitions*** to confirm approval or payment status (Invoicing Status: Fully Invoiced or Paid).
-- Payment is mailed to Supplier according to invoice/instructions.

I already paid or will pay for my eligible EAP,
PDAP, Wellness, and/or EAP Travel expenses
and
I need MC to reimburse me.



Step 1: Create Spend Authorization
(not required for Wellness – go to Step 2)



Step 2: Once Spend Auth is **APPROVED,**
Create Expense Report (immediately)



-- ***View Expense Reports*** to confirm approval or payment status (Status: Approved or Paid).
-- Deposit is made according to Payment Elections in ESS as a separate deposit (not included with payroll).

Contact **Accounts Payable** for questions related to payment (*i.e.*, status of payment, if payment has not processed or been received timely).

MC Tuition Waiver

- Tuition Waiver allows eligible employees to enroll in credit courses at MC. Credit courses must be scheduled outside of the employee's normal, non-adjusted working hours. WDCE courses are not eligible for Tuition Waiver, but may be eligible under EAP.
 - [Employee Tuition Waiver Application](#)
- Eligible spouses and dependents are also eligible for Tuition Waiver.
 - [Dependent Tuition Waiver Application](#)
- Fees and required books for MC courses may be covered under EAP for employees, but not eligible dependents.
 - [EAP Request Form for MC Courses, Fees, and Books](#)

FY24 EAP/PDAP Allocations

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FY24 EAP/PDAP Allocations

	Part-time Faculty	Full-time Faculty	Bargaining Staff	Non-Bargaining Staff
EAP/PDAP/ employee	\$1,250	\$3,120	\$2,800	\$2,500
EAP Travel/ employee		\$1,375	\$1,250	\$1,250
Total EAP/ PDAP Budget	\$54,000	\$481,522	\$400,000	\$803,798
Total EAP Travel Budget		\$193,850	\$50,000	\$141,650

FY24 Tuition Limits and Tax Implications

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FY24 EAP Tuition Limits

- Montgomery College will cover the cost per credit taken equal to the University of Maryland, College Park credit rate for in-state tuition and fees for undergraduate or graduate coursework, not to exceed twelve (12) credits in a fiscal year.
- For current UMD undergraduate and graduate Tuition and Fees, visit <https://billpay.umd.edu/costs>.

	In-State Tuition, up to 12 Credit Hours	Mandatory Fees for 9+ Credits (flat rate)	Total FY EAP Tuition Limit/ Overall Max EAP FY24 Limit
Undergraduate	\$4,944.50	\$808.00	\$5,752.50
Graduate/ Doctoral	\$9,936.00	\$641.50	\$10,577.50

Tax Implications for Tuition Payments

- MC will pay tuition on behalf of employees up to the FY24 EAP limits, however any amount above the annual IRS limit for educational benefits is taxable income for the employee.
- **For 2023, if your employer pays more than \$5,250 for educational benefits for you during the calendar year, then the amount over \$5,250 becomes taxable income.**
- This also applies to any additional funds that your department may be paying towards your tuition. These amounts must be reported to HRSTM for tracking purposes. **Anything above the \$5,250 for tuition becomes taxable income.**

Tax Implications for Tuition Payments

- By requesting and accepting tuition payments through EAP, employees understand and acknowledge that they are responsible for paying the taxes on any amount above the applicable IRS limit by the end of the calendar year.
- Taxable tuition amounts will be captured through quarterly reporting and processed twice per quarter on the two (2) immediate pay dates following the quarterly report – April, July, October, and December.

Tax Implications for Wellness Reimbursements

- Any wellness reimbursements and incentives are taxable.
- Taxable wellness reimbursement and incentives will be captured through quarterly reporting and processed once per quarter on the immediate pay date following the quarterly report – April, July, October, and December.

Submission Deadlines and Guidance

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Deadline to Submit is End of FY

- Workday is the HR and Financial Management system, which means that the **deadlines for payments and reimbursements are at an enterprise level and cannot be adjusted.**
- Office of Business Services (OBS) will announce the deadlines for final EAP requests and reimbursements, typically by April. **Employees cannot submit requests for EAP requests and reimbursements once the FY deadline has passed.**
- **OBS will allow employees that have an approved EAP event that occurs in June, or one that begins in June and straddles into July, to submit by an adjusted deadline, usually the first week of July.** There are no exceptions to this deadline; please plan accordingly.

Deadline to Submit is End of FY

- In addition to communications from OBS, HRSTM will also send reminders about the designated deadlines for all EAP requests via multiple channels, e.g., *Employee Matters* newsletter, email blasts, Facebook, etc. **Please look for and make note of applicable deadlines when announced.**
- Note there may be different deadlines for requisitions/receipts (direct pay) and spend authorizations/expense reports (reimbursements).

Timely EAP Submissions

- **Please DO NOT wait until the last minute to submit EAP requests.**
Adequate review and approval take time.
- You may need to make corrections or add missing information. **If so, the approval process starts over from the beginning.**
- **Late submissions will be considered for approval for the applicable (current) fiscal year, not the closed fiscal year.**

Holding Funds for the Next FY

- In the past, employees were able to make EAP requests in advance to hold EAP funds for the subsequent fiscal year.
- In Workday, this is no longer possible with the configuration of the Financial Management and Budget modules. **Employees cannot submit requests for EAP funds until the exact beginning of the fiscal year, which is July 1.**
- If you have an eligible EAP program that will occur at the very beginning of the fiscal year, you may want to consider paying and requesting a reimbursement to ensure timely payment to reserve your spot.

Eligible and Ineligible EAP Expenses

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What are **ELIGIBLE** EAP expenses?

- All eligible EAP and PDAP and related travel expenses must be pre-approved in accordance with [College PandP 35001 Compensation Programs \(XIX, A\)](#), including:
 - ✓ Doctorate, Graduate, and Undergraduate course tuition, mandatory fees, and required books
 - ✓ Non-credit WDCE courses that are job-related or preparing for a higher level/different position at the College and required books
 - ✓ Non-MC courses, conferences, seminars, and workshops and required books
 - ✓ Professional association memberships (the majority of the membership year should fall within the applicable FY)
 - ✓ Professional publications/journals/magazines related to but separate from paid memberships

What are **ELIGIBLE** EAP expenses?

- ✓ Professional certifications/licensures, including recertification
- ✓ Legal mandates
- ✓ MC Tuition Waiver mandatory fees and required books (for credit classes)
- Employees can also use EAP/PDAP funds, toward **approved wellness expenses, up to \$35 per month**:
 - ✓ MC-sponsored wellness programs
 - ✓ Outside gym memberships or subscriptions if you use the facility ten (10) separate days per month
 - ✓ Weight Watchers and other approved weight loss programs

What are **ELIGIBLE** Wellness Expenses?

- Gyms/fitness center memberships:
 - ✓ Your preferred gym/fitness/aquatic center
 - ✓ Discounted memberships at One Life, Lifetime Fitness, and more for MC employees
- Other wellness facility memberships and subscriptions:
 - ✓ Yoga/Barre/Pilates Studios, Orange Theory, F45, Club Pilates, Peloton, Active and Fit, Rock Climbing Centers, WW, Noom, etc.
- If your wellness facility or activity is not on this list, please email Megan.Cooperman@montgomerycollege.edu for approval.
- **Participants must provide proof of payment and attendance for reimbursement** (at least 10 days/month or 75% of a program with limited duration).

What are **ELIGIBLE** EAP expenses?

- ✓ EAP events must be in support of and service to your role at the College.
- Many employees have personal passions and have entrepreneurial endeavors outside of work for the College, but it is not appropriate to use EAP for personal hobbies or to promote another business.

What are **INELIGIBLE** EAP expenses?

- Ineligible EAP expenses include:
 - ❌ Admission application fees, graduation fees, and other charges that are not directly related to a particular course
 - ❌ Anything recreational or related to hobbies or a personal business
 - ❌ Art (unless specifically job-related and Manager approves)
 - ❌ Computer/IT equipment (see your Department for technology needs)
 - ❌ EAP expenses for an ineligible employee (see your Department in these cases regarding general training/professional development funds)
 - ❌ Maryland taxes on eligible expenses

What are **INELIGIBLE** EAP expenses?

- Ineligible EAP expenses include:
 - ❑ Optional or recommended books for courses or conferences, etc.
 - ❑ Any eligible EAP expense for a service that was not completed or completed with an unsatisfactory grade **(employees must reimburse MC in these cases, benefits are suspended if account is not settled)**
 - ❑ Any eligible EAP expense for a service that was covered while an employee was on paid Professional Development Leave (staff) or Sabbatical Leave (faculty) and does not return to or remain at the College at the conclusion of their leave as stated in their respective agreement **(employees must reimburse MC in these cases, benefits are suspended if account is not settled)**

EAP Travel Guidance (domestic and international)

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EAP Travel Reminders

- EAP follows [College PandP 65001 Reimbursement for Travel and Related Expenses](#) for EAP travel requests. Travel expenses related to an approved EAP event (even local travel and related meals) should be submitted as an EAP travel reimbursement request.
- All travel related to an approved EAP event will be paid by reimbursement only and **must be submitted within 30 days of completion of approved travel.**
- MC does not currently have a *per diem*, *i.e.*, daily allowance, for meal expenses when on approved travel. Employees **may be reimbursed for the reasonable cost of meals while traveling on official College business.** Any grocery store, restaurant, and/or food vendor is acceptable, as long as the food is practical and for the employee only.

EAP Travel Reminders

- For non-local travel requiring a flight or driving long-distance, **employees must use the most cost effective method of travel**. For example, a Business Class ticket would not be acceptable if an Economy ticket is available, driving long-distance is not acceptable if a flight or train is available.
- Basic documentation supporting this should be included with the Spend Authorization, such as flight estimates, Google Maps mileage estimates, etc. for approval **before the expense is incurred**.

EAP Travel Reminders

- Travelling with others is acceptable, but **eligible expenses must be in the employee's name and receipts must be itemized for reimbursement, *i.e.*, hotel, rental car, etc.**
 - **Significantly higher travel expenses for the sole purpose of accommodating additional travelers or coordinating a personal trip is not acceptable**, e.g., driving versus flying, or flying to/from a different city than the location of the EAP event. The lowest amount is reimbursable.
 - **Food for anyone other than the employee is not an eligible EAP travel expense.**
- **Alcoholic beverages or other personal items are not an eligible EAP travel expense.**
- **Don't forget that Maryland taxes on eligible expenses are not reimbursable.**

International EAP Travel Requests

- The landscape of education and professional development has evolved to include more opportunities to study and enhance professional development goals abroad.
- **In addition to supervisor approval, all international EAP requests and travel must be approved by the employee's Senior Vice President.** This approval should be in writing and attached to the documentation for your EAP request.
- **It is recommended that employees process international EAP requests as reimbursements**, due to delays that may happen with setting up an international Supplier in Workday, currency exchange fees, longer mailing times and costs, etc.

International EAP Travel Requests

- Make sure you **use your U.S.-issued credit cards** because the daily exchange rate will automatically be done for you on the statement. **DO NOT use cash.**
- Note that even with the potential for additional fees, the same EAP per employee limits apply.

EAP Travel Cancellations

- Any changes to your EAP event plans that require cancellation of registration, flights, and hotel fees are handled by employees and not the responsibility of HRSTM.
 - If your registration was processed by HRSTM as a Requisition and Receipt (direct payment to the vendor), **it will be refunded to the College by the vendor.**
 - If you paid for the registration but did not submit an EAP request for reimbursement, then you must contact the vendor directly for a refund.
 - If your registration was processed by HRSTM as a Spend Authorization and Expense Report (direct payment to the employee), **it must be refunded to the College by the employee, as it is now an ineligible expense. Remember, EAP benefits are suspended if accounts are not settled.**

Preparing for and Processing your EAP Request

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Prepare for your EAP Request

- Determine if your request is a Requisition or a Reimbursement.
- Review applicable resources, job aids, and/or videos to prepare; **procurement is comprised of Workday Employee Self-Service (ESS) and Manager Self-Service (MSS) business processes.**
- Confirm whether your Supplier is already in Workday:
 - Contact OBS ([Accounts Payable](#) or [Procurement](#)) to check Workday for your Supplier
 - If it's not there, refer to the [Create Supplier Request job aid](#) or [video](#)
- Complete your EAP documentation and save it to your computer for uploading into Workday, including your EAP Acknowledgement Form.
- Enroll in Direct Deposit for your Reimbursement (if applicable); refer to the [Manage Payment Elections job aid](#).

Suppliers: MD Colleges and Universities

State of Maryland	University System of Maryland
<ul style="list-style-type: none"> • Baltimore City Community College • Morgan State University • St. Mary's College of Maryland • Universities at Shady Grove 	<ul style="list-style-type: none"> • Bowie State University • Coppin State University • Frostburg State University • Salisbury University • Towson University • University of Baltimore • University of Maryland, Baltimore • University of Maryland, Baltimore County • University of Maryland, College Park • University of Maryland, Eastern Shore • University of Maryland Global Campus • University of Maryland Center for Environmental Science

Acceptable Justifications are Required

- Employees **must include a specific justification** for their EAP expenses. Your request will be sent back without an acceptable justification.

Acceptable Examples	Unacceptable Examples
<ul style="list-style-type: none"> ✓ This course is required for my degree program, which is related to my current job. 	<ul style="list-style-type: none"> ✗ Professional development
<ul style="list-style-type: none"> ✓ Seminar ABC will provide updates/new insights for my new job duties at the College and help better prepare me for the transition. 	<ul style="list-style-type: none"> ✗ Simply listing the name of the conference or workshop
<ul style="list-style-type: none"> ✓ The XYZ Professional Membership is critical for keeping me up to date on changes and new trends and compliance in my area/field. 	<ul style="list-style-type: none"> ✗ I enjoy learning about XYZ... ✗ My manager approved... ✗ ABC looks interesting...

Adding your Justification

- When your request is for **MC to pay your Supplier**:
 - Step 1: **Create a Requisition**. The justification should go into the **Memo field**. A simple description of the EAP service goes in the Description field.
 - Step 2: **Create a Receipt**. The Description should populate from the Requisition/PO in the Item Description and Memo fields.
- When your request is for **MC to reimburse you**:
 - Step 1: Create a **Spend Authorization**. The justification should go into the **Justification field**. Simple description of the EAP service goes in the Description field.
 - Step 2: **Create an Expense Report**. The Description from the Spend Authorization will populate in the Memo field.

EAP Acknowledgement Form

- Beginning January 1, 2023, all EAP requests must include a completed EAP Acknowledgement Form with the documentation uploaded for the request.
- This form will be required to confirm that all employees understand the EAP policy [[College PandP 35001 Compensation Programs \(XIX, A\)](#)] regarding eligible EAP services and the consequences should the employee not attend or complete the program, course, seminar, etc., secure a satisfactory grade upon completion of a credit course, or receive taxable benefits above the IRS limit.
- **It will also aid employees with confirming the Activity Type, Spend Category, and Activity Code in advance of entering into Workday.**
- You can find the EAP Acknowledgement Form on the [HRSTM EAP Page](#).

Helpful Workday Apps for EAP Requests

Requisitions – create new Requisitions and check the status of processed Requisitions



Requisitions



Expenses

Expenses – create and view Expense Reports

Pay – manage pay elections to receive Payroll and Expense (*i.e.*, Reimbursement) payments via direct deposit



Pay



Learning

MC Learns via Learning – learning management system for Workday training recordings, including Procurement Business Processes

EAP Request Workflow

I need MC to pay the Supplier
for my eligible EAP expenses,
EXCEPT for EAP Travel, Wellness, and PDAP
which are reimbursement only.



Step 1: Create Requisition
(choose **Service**)



Step 2: Once Requisition is **APPROVED,**
Create Receipt (next business day)



Upon final approval, by the Manager **AND** the EAP Partner, AP processes payments weekly.
If approved by Wednesday, payment will be included in Thursday check run for Friday.

-- ***Search My Requisitions*** to confirm approval or payment status (Invoicing Status: Fully Invoiced or Paid).
-- Payment is mailed to Supplier according to invoice/instructions.

I already paid or will pay for my eligible EAP,
PDAP, Wellness, and/or EAP Travel expenses
and
I need MC to reimburse me.



Step 1: Create Spend Authorization
(not required for Wellness – go to Step 2)



Step 2: Once Spend Auth is **APPROVED,**
Create Expense Report (immediately)



-- ***View Expense Reports*** to confirm approval or payment status (Status: Approved or Paid).
-- Deposit is made according to Payment Elections in ESS as a separate deposit (not included with payroll).

Contact **Accounts Payable** for questions related to payment (*i.e.*, status of payment, if payment has not processed or been received timely).

Helpful Info: Important Reminders

- Please remember that the system will automatically default to your current Cost Center information. This is NOT the correct Cost Center for EAP requests.
 - **When choosing a Cost Center, do not type in the correct code, but rather SCROLL DOWN and click on your Cost Center selection so that it populates the next two (2) required fields (Program and Fund).**
- You need to CAREFULLY review each and every field to make sure the information is correct before you move forward.
- You may also need to REMOVE information in fields that may not be applicable.
 - For example, **Faculty need to delete the Discipline from the Additional Worktags field.**

Helpful Info: Key Data Fields

- Requisition type
 - Always choose **EAP**
- Cost Center
 - Always change to **MC0001 Collegewide Operations**
 - **If you delete the default Cost Center, then SCROLL DOWN and choose MC0001 at the bottom of the list (instead of typing it in and hitting Enter), it will auto-populate the Program and Fund fields.**
 - This is the most common mistake for EAP requests, which results in Failed Budget errors and processing delays. The Program and Fund fields must be accurate for EAP requests to be processed correctly.

Helpful Info: Key Data Fields (continued)

- Start Date and End Date
 - Always add the **Start and End Dates** of your EAP Service (these are **required even though not always marked with ***)
- Non-Catalog Items
 - Always choose **Services** (**DO NOT choose Goods**; the form will populate different field options if you forget to do this)

Helpful Info: Activity Codes

- Additional Worktags → **Activity codes**
- Not a required field, but you can add if you know which Activity Code applies (EAP Partner will add if left blank)
 - **Activity B:** Compliance and Ethics
 - **Activity D:** Equity, Diversity, Access, and Inclusion
 - **Activity G:** Continuing Education in Discipline/Field/Profession
(*most popular option*)
 - **Activity L:** Leadership, Management, and Supervision
 - **Activity M:** Educational Credentialing/Certifications/Licensures
(*for license/certification renewals*)

Helpful Info: Activity Codes (continued)

- Additional Worktags → **Activity codes**
- Not a required field, but you can add if you know which Activity Code applies (EAP Partner will add if left blank)
 - **Activity P:** Professional Memberships
 - **Activity R:** Language, Literacy, and Communication
 - **Activity T:** Technology or Cybersecurity
 - **Activity U:** Teamwork and Collaboration
 - **Activity W:** Wellness

Helpful Info: Spend Categories

- Requisition/Receipt (pay the Supplier) and Spend Authorization/Expense Report (reimburse me):
 - **5521**: EAP – Non-MC Courses, Seminars, Conferences, and Workshops
 - **5522**: EAP Tuition – Graduate/Doctorate
 - **5523**: EAP Tuition – Undergraduate

Helpful Info: Spend Categories (continued)

- **Wellness, PDAP, and EAP Travel are reimbursement only and ineligible for prepay.**
- **Spend Authorization/Expense Report (reimburse me) ONLY:**
 - **5525:** EAP Wellness Class/Outside Gym Membership
 - **5540:** PT Faculty Professional Development (all PDAP expenses, including the course, travel)
 - **5545:** EAP Travel

Most Common Mistakes

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Most Common Mistakes

- **ALWAYS** change the Code to MC0001. This is the #1 mistake. When you forget to change this, it causes Failed Budget errors and processing delays. The Program and Fund fields must be accurate for EAP requests to be processed correctly. **Faculty need to delete the Discipline from the Additional Worktags field.**
- **Complete your EAP/PDAP Acknowledgement Form** to make sure you have all the information you need **BEFORE** you sit down to enter your request. Make sure it is for the correct FY.
- Give yourself enough time; **DO NOT** wait until the last minute. You may need additional time to make corrections or add missing information.
- **Managers SHOULD NOT blindly approve requests.** Review for accuracy and eligibility. Ask yourself, “Would I pay for this from my department budget if necessary?”

Most Common Mistakes

- All requests have **TWO (2) STEPS**: Requisition AND Receipt, **OR** Spend Authorization AND Expense Report. Don't forget to process your applicable second step once the first step has been approved. Your request is not complete until the second step is processed; your payment will not be made until both steps are done and approved.
- Make sure you **confirm your Supplier** is correct for Requisitions. Use the cheat sheet in this guide for all Maryland colleges and universities.
- Make sure your **documentation includes start and end dates** for your EAP request. **EAP requests cannot be approved without dates.**
- Be sure your wellness facility/subscription is approved. **Make sure your wellness requests include your proof of attendance and payment.**

Most Common Mistakes

- Creating **more than one Expense Report** for one Spend Authorization will generate an error that you have exceeded the 10% buffer for approval. You will have to cancel them all and start over.
- **Remember the correct way to submit your request** – Workday (non-MC courses, conferences, etc., travel, and wellness for EAP and all eligible PDAP), Tuition Waiver website (MC credit courses for FTF and Staff), or via email (MC books and fees and MC non-credit for FTF and Staff).
- Do not enter an EAP request if you have questions about eligibility, timing, etc. **If it is the wrong FY, HRSTM will just send it back for resubmission; we will not fully process the request.** Email us at EAPRequests@montgomerycollege.edu if you have specific questions about your request BEFORE you submit it.
- **Read the comments!** When HRSTM sends back requests with comments, pay attention to the information and/or explanation that was provided.

Demo Videos and Resources

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EAP Request Workflow

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EXCEPT for EAP Travel, Wellness, and PDAP
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Contact **Accounts Payable** for questions related to payment (*i.e.*, status of payment, if payment has not processed or been received timely).

Workday EAP Request Demos

- I need MC to **Pay the Supplier:**

- Demo Videos:

- [Create Supplier Request \(Total Time 3:32\)](#) (if applicable)

- [Step 1 of 2: Create Requisition \(Until 9:57\) and Step 2 of 2: Create Receipt \(Total Time 12:23\)](#)

- I need MC to **Reimburse Me:**

- Demo Video:

- [Step 1 of 2: Create Spend Authorization \(Until 10:37\) and Step 2 of 2: Create Expense Report \(Total Time 15:08\)](#)

EAP Training and Resources

- [HRSTMEAP Page](#)

- General EAP info and current EAP Resource Guide
- Allocation and utilization data by employee type and bargaining status for the applicable fiscal year
- FAQs

- [Workday Training Page](#)

- Job aids and recordings

- [HRSTM Forms Page](#)

- EAP Forms for MC Courses

Additional EAP Support

- **Contact EAP Requests for Personal EAP Help Sessions and with general EAP inquiries**
 - EAPRequests@montgomerycollege.edu

Workday Support Resources

■ IT Service Desk

- 240-567-7222
- itservicedesk@montgomerycollege.edu

■ HR Help Desk

- 240-567-5353
- hrstm@montgomerycollege.edu

■ OBS (Finance, AP, Procurement)

- 240-567-5292
- accountspayable@montgomerycollege.edu,
procure@montgomerycollege.edu, or
finance.obs@montgomerycollege.edu

Have a great Workday!



“The secret to change is to focus your energy not on fighting [about] the old, but on building the new.”
– Socrates

“We got this!”
– Monty

Managing Life in the Workplace

Teresa Natera
Human Resources Specialist II
Leave Specialist

Managing Life in the Workplace

- ADA Accommodations/ Ergonomic Assessments
- Time off -Advanced Sick time off/STD/LTD/FML/LWOP
- Drug and Alcohol Abuse Prevention Policy/Faculty Staff Assistance Program (FSAP)
- Workers' Compensation
- HIPAA Privacy
- Supervisory challenges since the pandemic.

Remote Work Request

- What is the criteria for approving the request?
- What is my role as the supervisor?
- Is performance a factor?
- Reporting leave during remote work.
- How do I manage a remote worker?

Managing Life in the Workplace

Americans with Disabilities Act (ADA)

- Who is covered?
- What is a reasonable accommodation?
- How do you request an accommodation?
- Why do you need to request an accommodation?
- What questions can a supervisor ask an employee related to the disability?
- Privacy and confidentiality of health information.



Managing Life in the Workplace

LEAVE TYPES

- Short Term Disability Leave (STD)
- Long Term Disability Leave (LTD)
- Advanced Sick Time Off
- Leave Without Pay (not FML)

Managing Life in the Workplace

- **Family and Medical Leave (FML)**
- Who is eligible – 1 year and 1,250 hours
- What is the duration – 12 weeks – 480 hours
- Intermittent use of FML
- Military FML – 26 weeks
- Sick leave runs concurrently with FML

Managing Life in the Workplace

Bonding Leave

- Mothers and fathers are eligible
- Must be taken by baby's 1st birthday
- May not be taken on intermittent basis without employer's consent
- Fathers may use up to 12 weeks of sick leave for bonding with the baby.
- Annual leave may also be used during this time if approved by the supervisor.

Mental Health-Friendly Workplace

- Role of the Supervisor
- Awareness
- Accommodations
- Assistance
- Access

Managing Life in the Workplace

MC CARES

Care, Advise, Respond, Engage, Support

This is a voluntary, CONFIDENTIAL assistance program designed to help employees and their families with life issues & situations, including: marital concerns, stress, family pressures, financial difficulties, bereavement, elder care, pet sitting, vacation planning.

- Available 24 hours a day/7 days a week
- NO cost to employees or family members
- Up to 6 free sessions per issue

Managing Life in the Workplace

Drug and Alcohol Abuse Prevention Policy 31005CP

- Prohibits possession, use or distribution of unlawful drugs and alcohol on college property.
- Disciplinary action for violating the policy.
- No open containers of alcohol in your vehicle.



Managing Life in the Workplace

Standards of Conduct for Employees

- Report to work “Fit for Duty”
- Able to work safely
- Promptly disclose restrictions to supervisor
- Do not disclose underlying medical condition to supervisor
- HIPAA Privacy Official at the College – Rowena D’Souza

Managing Life in the Workplace

Worker's Compensation Program

- CorVel Corporation Services
- Report incident to Security
- First visit is always covered
- Provide clinic with documentation
- Reimbursement at 66 2/3% or 100% of pay
- Use of leave while out of work due to a work injury/illness

Managing Life in the Workplace

Contact Information

- Rowena D'Souza – 240-567-5370/ADA/Risk Management
- Teresa Natera – 240-567-3137/Leave and Ergonomic Specialist

Managing Life in the Workplace



Thank you!

Managing Ethically and with Integrity

Maria Adams

Compliance and Ethics Specialist

Office of Compliance, Risk, and Ethics

maria.adams@montgomerycollege.edu

Managing Ethically and with Integrity

Learning Outcomes

- Understand ethical culture and how ethical leaders positively impact organizational culture.
- Know how to report concerns and wrongdoing at Montgomery College.
- Recognize how ethical expectations support the work experience.

Managing Ethically and with Integrity



Managing Ethically and with Integrity

Compliance and Ethics
Awareness Week

November 6 – 10, 2023

Managing Ethically and with Integrity

Organizational and Ethical Culture



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Tone At The Top

A term used to define management's leadership and commitment towards openness, honesty, integrity, and ethical behavior.

Tone At The Top Affects

Mood In The Middle

Buzz At The Bottom



Fostering an Ethical Culture at MC

The Office of Compliance, Risk, and Ethics is responsible for overseeing, monitoring, and coordinating compliance matters for the College. The Office also is committed to promoting an environment where the seven ethical expectations—Accountability, Civility and Collegiality, Compliance, Fairness, Honesty, Respect, and Stewardship—are upheld by every employee.

Managing Ethically and with Integrity

Mission, Vision, and Values

Values Statement

*At our core, we believe in welcoming all students and all employees into a community that emphasizes belonging. We believe in giving every individual what they need to succeed (**Equity and Inclusion**). We believe in conducting our teaching and service duties with distinction (**Excellence**) in an ethical and trustworthy manner (**Integrity**). We are dedicated to being a transformational institution seeking social justice and are continuously updating and improving all our learning environments, the curriculum, and student services (**Innovation**) to meet the changing needs of our community (**Adaptability**). We make decisions about our operations in a way that respects and sustains the environment (**Sustainability**). We conduct ourselves with civility, courtesy, and professionalism in all our interactions (**Respect**).*

<https://www.montgomerycollege.edu/about-mc/mission-values.html>



Fostering Student Success at MC

Student success is inherent to the work and efforts of the Office of Compliance, Risk, and Ethics. Montgomery College students are empowered through awareness and engagement about critical compliance-related initiatives. Woven into this work is a commitment to advancing an ethical and equitable College culture that fosters inclusion, social justice, and support for students to thrive during their journey at MC.

Managing Ethically and with Integrity

Student Success Policy and Procedure – 41000

“II. C. Student success is enabled when faculty and staff are committed to:

1. providing a positive, welcoming climate that reflects an ethical and caring college community;” (41000CP)

Managing Ethically and with Integrity

Code of Ethics and Employee Conduct and Ethical Role Models

Managing Ethically and with Integrity

Code of Ethics and Employee Conduct Policy and Procedure 31000



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Ethical Expectations



Managing Ethically and with Integrity

Which of the Ethical Expectations would you be most interested in sharing information about with your team?

Accountability
Civility and Collegiality
Compliance
Fairness
Honesty
Respect
Stewardship

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Thinking Critically As An Ethical Role Model

- Does this violate any law, policy, or standard of conduct?
- What are the risks and benefits, both short and long term?
- What are the positive and negative consequences of each option?

Managing Ethically and with Integrity

Supervisors as Ethical Role Models

- Employees are encouraged to come to you with concerns.
- As supervisors, you are responsible to hear employee's concerns and address them.
- **Resources are available for guidance for areas of uncertainty or to confirm you are providing the right guidance.**

Managing Ethically and with Integrity

Supervisors as Ethical Role Models

- It is better to ask than proceed without certainty. When in doubt, check it out.
- Employees are protected against retaliation.

Managing Ethically and with Integrity

Reporting Concerns and Wrongdoing

Managing Ethically and with Integrity

Reporting Concerns and Wrongdoing

- Employees are expected to report suspected wrongdoing.
- Employees are encouraged to report suspected wrongdoing to their supervisor as a first contact.
- Supervisors are to address the concerns and escalate as appropriate. Resources are available for guidance for areas of uncertainty or to confirm you are providing the right guidance.
- Employees also can report anonymously to the College's confidential reporting line, EthicsPoint.

Managing Ethically and with Integrity

EthicsPoint Confidential Reporting Line

844-572-2198

**[www.montgomerycollege.
ethicspoint.com](http://www.montgomerycollege.ethicspoint.com)**

Montgomery College Confidential Reporting Line

MC
MONTGOMERY
COLLEGE

Anonymous and confidential reporting line
hosted by **EthicsPoint**

Call
844-572-2198
or visit
www.montgomerycollege.ethicspoint.com

Not sure if you have an ethical conflict to report? Questions
about the types of ethical concerns employees may report?

**Contact the Office of Compliance,
Risk, and Ethics**

240-567-7396
ethics@montgomerycollege.edu
montgomerycollege.edu/ethics

Managing Ethically and with Integrity

Roadmap for Employees to Address Concerns



ROADMAP FOR EMPLOYEES TO ADDRESS CONCERNS

Do you have a concern you feel needs to be addressed? This document provides a roadmap regarding where you can go for assistance and resolution.

Contact your supervisor or manager with your concern. Supervisors and managers are your first line of communication.

Ombuds—Guidance at any time.

- Confidential, neutral, independent, and informal resource with whom you can discuss any and all workplace issues
- Offers discussion and coaching on workplace issue resolution, strategies, and options
- Refers employees to other MC resources

Ombuds@montgomerycollege.edu

EthicsPoint Reporting Line

- Submit concerns anonymously and confidentially
- Managed by the Office of Compliance, Risk, and Ethics

montgomerycollege.ethicspoint.com
844-572-2198

Intellectual Property Concerns

- Contact the Dean of the relevant academic department

Additional Resources

- Governance Councils
- Labor Unions—AAUP, SEIU, or AFSCME

Student Concerns

Visit the Student Complaint Resolution webpage for policies and procedures about reporting your concerns.

If contacting your supervisor/manager is not possible or appropriate, or you wish to obtain further assistance, then contact the appropriate area listed below. Your options for consultation and resolution may vary based upon your concern.

Human Resources: Employee and Labor Relations EmployeeRelations@montgomerycollege.edu

- Alcohol or Drug Abuse • Benefit Abuse • Bias Incidents
- Disability Discrimination • Discrimination or Harassment
- Employee Behavior • Incivility • Nepotism or Favoritism
- Sexual Harassment • Workplace Violence or Bullying

Compliance, Risk, and Ethics Ethics@montgomerycollege.edu

- Conflict of Interest • Disability Access Issues • Ethical Misconduct
- Grants Research Fraud or Misconduct • Improper Giving or Receiving Gifts
- Maryland State Ethics Filing and Reporting Questions
- Protection of Minors • Regulatory Compliance
- Violations of College Policies not otherwise identified
- Title IX • Athletic Concerns

Internal Audit InternalAudit@montgomerycollege.edu

- Accounting and Auditing Matters
- Falsification of Contracts, Reports or Records
- Fraud • Theft/Embezzlement • Employee Time Reporting or Time Abuse
- Waste, Abuse, and Misuse of Institution Resources

IT Privacy & Cybersecurity Compliance ITSecurity@montgomerycollege.edu

- Data Privacy • Inappropriate Use of Technology
- Account Compromise/Credential Theft

Environmental Safety EnvironmentalSafety@montgomerycollege.edu

- Occupational Safety Concerns • Environmental Related Issues

Library libguides.montgomerycollege.edu/copyright

- Copyright Questions and Concerns

Office of Public Safety and Emergency Management 240-567-3333

- Physical Safety and Protection • First Aid • Emergency Assistance
- 24-hour Escort Service (upon request) • Lost and Found

Please contact the Office of Compliance, Risk, and Ethics if your concern is about one of these offices or a lack of response to a concern.

Please contact the Chief of Staff/Chief Strategy Officer in the Office of the President if the focus of your concern is about the Office of Compliance, Risk, and Ethics.

Managing Ethically and with Integrity

Reporting Concerns and Wrongdoing

- For Guidance, see College Policy and Procedure:
 - 31000 – Code of Ethics and Employee Conduct
 - 61008 – Reporting Suspected Acts of Wrongdoing
 - 39003 – Protection Against Retaliation

Managing Ethically and with Integrity

Ethical Scenario

Chris, an employee, is assigned a task by Pat, the supervisor. The task is important to the overall project and requires new skills that Chris either does not have or has a very basic ability. Chris never asks for clarification nor resources, and Pat never checks in for progress reports. Not surprisingly, the task is not completed by the deadline. Pat meets with Chris to discuss missing the deadline, and Chris explains that more direction was needed for this project. Pat, who is angry with Chris, says there are so many moving parts to the entire project that not every step can be monitored.

**Is there an ethical dilemma here?
What would you do to navigate it?**

Managing Ethically and with Integrity

www.montgomerycollege.edu/ethics

Thank You and Best Wishes with Your Team!

Managing Ethically and with Integrity

Manager's Toolkit

- Ethics website - Training and Resources:
 - *Ethical Leadership*
 - *Ethical Expectations*
 - *Reporting Concerns*
 - *Avoiding Retaliation*
 - *Additional Resources*

Managers Toolkit

As part of efforts to foster a strong ethical culture at Montgomery College, please note these special resources for managers and supervisors for compliance and ethics information. We encourage managers to share this critical information with their teams. All employees are welcome to utilize these resources. Please contact ethics@montgomerycollege.edu with any questions.

Ethical Leadership

[Ethical Expectations](#)[Reporting Concerns](#)[Avoiding Retaliation](#)[Additional Resources](#)

Responsibilities of Leadership

(from the [MC Code of Ethics and Employee Conduct Handbook](#))

Montgomery College employees in supervisory positions are the foundation of college leadership, and their role carries several additional responsibilities.

First and foremost, it is important for supervisors to lead by example. By working ethically and demonstrating high standards for self and others, you support and encourage a civil and professional work environment.

*When establishing and maintaining their unit, supervisors need to set clear expectations and discuss those expectations with employees so they have an adequate understanding of our **Code of Ethics and Employee Standards of Conduct** (PDF, ). They must make sure to provide access to resources and strive to promote a culture where employees feel comfortable asking questions and voicing concerns.*

College leaders should also continually work to encourage the development of personnel, acknowledge and retain competent personnel, and seek ways to sustain a high level of morale within their units.

Remember, it is never right to retaliate or tolerate retaliation against any employee for raising concerns that he or she believe to be true.

Managing Ethically and with Integrity





Thank You!

HRSTM would like to thank you for your time and participation in attending the Supervisor Orientation.

I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel. – Maya Angelou

