Boston University School of Public Health

Staff and Operations Handbook

February 12, 2024

BOSTON
UNIVERSITY

Contents

Introduction

About our School

The Boston University School of Public Health aspires to provide the best possible environment for its staff to engage in their work towards the school's core purpose: Think. Teach. Do. For the Health of All. To that end, the Staff and Operations Handbook is intended to collect the policies and procedures of the School. These policies and procedures shape the context in which we all operate. The School's work aspires to advance our core mission and to live by our core values:

> **SPH Mission.** To improve the health and well-being of populations worldwide, particularly the underserved, through excellence and innovation in education, research, and practice
>
> **SPH Values.** We are committed to igniting and sustaining positive change that leads to health and well-being around the world. We strive for a respectful, collaborative, diverse, and inclusive community within our School of Public Health. We aim to promote justice, human rights, and equity within and across our local and global communities.

Founded in 1976, SPH confers master's degrees and doctoral degrees and is accredited by the Council on Education for Public Health. SPH is ranked the top eighth School of Public Health according to US News and World Report. With this ranking, SPH is in the top five private schools of public health and in the top 5 percent of the nation's 183 schools and programs of public health. We are a school that strives for excellence in all we do.

About our Community

The School of Public Health has over 300 faculty and 250 staff in six departments and four centers. The departments are Biostatistics; Community Health Sciences; Environmental Health; Epidemiology; Global Health; Health Law, Policy, and Management. The centers are the Biostatistics and Epidemiology Data Analytic Center (BEDAC), the Center for Health Law, Ethics and Human Rights (CLER), the Center for Climate and Health, and the Center for Trauma and Mental Health. The work of the departments and centers is facilitated by the school's central support offices: Administration and Finance, Admissions, the Career and Practicum Office, Communications, the Dean's Office, Development and Alumni Relations, Education Office, Graduate Student Life, the Registrar's Office, and Research and Faculty Advancement. The BUSPH bylaws outline the organization and governance structure of the School.

We have over 1,000 students and over 10,000 alumni. Our alumni are spread across 115 countries, and we continue to engage them through annual tentpole events regionally, through alumni mentoring, and through BU Giving Day, among others. Orientation and graduation are our happiest days of the year and faculty and staff are encouraged to participate. Our students go on to do inspiring work in both the public and private sectors.

In addition to world-class research and education, SPH is committed to translating that work and meaningfully engaging communities. The Activist Lab serves as the nexus for the School's engagement with communities near and far. Public Health Post seeks to elevate the public conversation on health and posts daily articles by our Public Health Post Fellows and guest contributors. idea hub facilitates partnerships with non-traditional funders to accelerate improvements in population health.

All faculty and staff are invited to the monthly School Assembly, and all members of the community are invited to our Signature Programs, which are free, open to the public, and accessible to all. The Dean's Office hosts several all school celebrations, including the annual SPH Holiday Party in December and the annual SPH Spring Celebration in May.

About this Handbook

The Staff and Operations Handbook is a 'living document' and will change and evolve over time as the school's policies and procedures evolve. The most up-to-date policies and procedures are in the electronic version of this handbook at bu.edu/sph/staffhandbook.

The School's most recent Strategic Plan, articulated in 2019-2020, is in Section II.2 and at bu.edu/sph/strategymap. This informs central action by the school in support of its core purpose. Additionally, each member of the faculty and staff is listed in the SPH directory: bu.edu/sph/directory. At heart, we are convinced that a school is only as great as its community, and this handbook aims to be part of an effort to create the best possible environment for our staff to work.

Welcome to the Boston University School of Public Health. We are glad to have you here.

I. Boston University Policies and Campus Life

Boston University provides policies and resources for all staff. A full list of policies is available at BU Policies Central (bu.edu/policies), and particularly relevant policies are available in the BU Employee Handbook (https://www.bu.edu/policies/employee-handbook-human-resources-policies-manual/) or at BU Staff Central (bu.edu/staff/). All SPH policies align with University policies, and the University policy takes precedent in any cases of disagreement.

1. BU Employee Handbook: https://www.bu.edu/policies/employee-handbook-human-resources-policies-manual/
    a. Employment policies
        i. Equal opportunity, affirmative action, non-discrimination, reasonable accommodations
        ii. Recruiting, interviewing, and hiring
        iii. Employment of aliens, minors, relatives, and students
        iv. Employee orientation
    b. Job-related policies
        i. Hours of work
        ii. Attendance
        iii. Promotions and transfers
        iv. Termination notices
        v. Reduction in workforce
        vi. Employee grievance process
        vii. Length of service
        viii. Health and safety
        ix. Performance evaluation program
    c. Authorized absences from work
        i. Vacation leave
        ii. Sick leave
        iii. Personal days
        iv. Parental leave
        v. Sympathy leave
        vi. Jury duty leave
        vii. Military leave
        viii. Holidays
        ix. Compensatory time off
        x. Intersession closings
        xi. Emergency university closing
        xii. Family and Medical Leave (FMLA)
        xiii. Unpaid time off
        xiv. Leave of absence – medical (unpaid)
        xv. Leave of absence –personal (unpaid)
        xvi. Religious holidays (unpaid)

   xvii. Domestic violence leave
d. General policies
   i. University rules of conduct
   ii. Conflict of interest
   iii. Patent policy
   iv. Solicitations and distribution
   v. Copyright policy

2. BU Staff Resources: bu.edu/staff

a. Working at BU
   i. Employment
   ii. Training
   iii. Education
   iv. Support Services
b. Wellness
   i. Health and wellness
   ii. Physical fitness
   iii. Fitness and recreation centers
c. Campus services
   i. Parking and transportation
   ii. Libraries
   iii. Dining
   iv. Financial
   v. News and events
d. Entertainment
   i. Arts and performances
   ii. Music organizations
   iii. Theater
e. Safety
   i. Personal safety
   ii. Workplace safety
   iii. Property
f. Policies
   i. Employment policies
   ii. Procedures
g. Quick links
   i. Webmail
   ii. Human Resources
   iii. Policies
   iv. Personnel policy manual
   v. Strategic plan
   vi. Code of Ethical Conduct
   vii. Calendars
   viii. BU Today

3. University Holiday and Intersession Schedule: bu.edu/calendar/holidays.html

4. Technology and Communications
    a. BU Information Services and Technology: bu.edu/tech/
    b. BUMC Information Services and Technology: bumc.bu.edu/it/
    c. BU Today: bu.edu/today

II. The School of Public Health

1. SPH Bylaws

ARTICLE I. Administration

A. Relation to the University and Medical Campus

The School of Public Health is a school at Boston University, located on the Boston University Medical Campus. The School is subject to the policies and procedures of Boston University, the University Provost, and the Medical Campus Provost.

B. Mission of the School

The mission of the School shall be to improve the health and well-being of populations worldwide, particularly the underserved, through excellence and innovation in education, research, and practice.

C. The Dean

The Dean will have direct oversight over all educational, research, and service programs and over the administrative and budgetary aspects of the School.

The Dean will:

1. Be responsible for the review and analysis of existing educational, research, service, and administrative programs, identification of program problems, and development of recommendations for improvement.

2. Develop annually, with the department chairs and heads of administrative units, a budget for the School for submission to the Medical Campus Provost, University Provost, and the President of the University.

3. Negotiate contracts with faculty and staff subject to University policies and approvals.

4. Approve in advance of submission all applications for grant monies for the support of teaching, training, or research.

5. Coordinate the activities of the School with the other Medical Campus schools.

6. Preside at meetings of the School Assembly.

7. Chair the Governing Council.

8. Be an ex officio member of all standing committees.

9. Appoint the chairs of all committees except the Governing Council.

10. Approve the members of all committees except the Governing Council.

11. Have such other duties, responsibilities, and authority as may be delegated to the Dean from time to time by the Medical Campus Provost, University Provost, or the President of the University.

D. Organizational Units

1. The organizational units of the School shall be departments, school-wide centers, and administrative offices. An organizational chart is available as Appendix A. Detailed organizational charts are available in the Faculty and Staff Handbooks.
2. Requests for creation, modification, and elimination of departments and centers may be initiated by the School's faculty, associate deans, or Dean, and must be approved by the Governing Council and University Provost. Requests for the creation, modification, and elimination of administrative offices may be initiated by the School's faculty, associate deans, or Dean, and must be approved by the Governing Council.
3. Faculty appointments are made to a department, though faculty may work interdepartmentally and within centers and offices as agreed upon with their department chair.

E. The Associate Deans

Associate deans will be appointed by the Dean and shall serve at the pleasure of the Dean. They will perform such duties as are assigned to them by these bylaws and by the Dean.

1. Senior Associate Dean
   A senior associate dean may be appointed by the Dean to represent the School in the absence of the Dean and to perform such duties as requested by the Dean. The position of senior associate dean may be assigned to a person who holds another associate dean position. Should the Dean choose to appoint a current associate dean to the position of senior associate dean, Section G1 of this article will not apply to such an appointment.

2. Associate Dean for Administration
   The Associate Dean for Administration is responsible for the School's administrative and financial portfolio, including long-term strategic financial planning, human resources administration, sponsored research administration, building operations, infrastructure, and space planning, and works closely with the Dean and the other associate deans on all matters related to school operations.

3. Associate Dean for Diversity, Equity, Inclusion, and Justice
   The Associate Dean for Diversity, Equity, Inclusion, and Justice is responsible for promoting and coordinating the School's diversity, equity, inclusion, and justice (DEIJ) activities. Responsibilities include, but are not limited to, working closely with school leadership to coordinate DEIJ activities and events, reviewing and evaluating School policies and practices to ensure best practices are being implemented appropriately, and

recommending measures to enhance DEIJ practices, events, and activities.

4. Associate Dean for Education
   The Associate Dean for Education is responsible for overseeing all of the School's academic programs. Responsibilities include curriculum planning and review, academic policy creation and implementation, faculty educational development activities, and student academic discipline.

5. Associate Dean for Public Health Practice
   The Associate Dean for Public Health Practice is responsible for the School's practice programs and for its linkages with external organizations. Responsibilities include promoting the School's engagement with the global public health practice community, strengthening connections with public health agencies, and promoting public health practice activities throughout the School.

6. Associate Dean for Research and Faculty Advancement
   The Associate Dean for Research and Faculty Advancement is responsible for promoting and coordinating the School's research programs and for overseeing the School's faculty development efforts. Responsibilities include, but are not limited to, the review and evaluation of research programs, recommending measures to enhance the quantity and quality of research at the School, creating research training and mentoring programs for faculty, overseeing the School's Faculty Handbook, and distribution of the School's pilot grant research program.

F. Other Administrative Appointments
   1. The Dean may appoint other associate or assistant deans who shall serve at the pleasure of the Dean.

   2. The Dean will appoint the chairs of the departments who will serve at the pleasure of the Dean.

   3. The Dean may appoint the directors or heads of academic and research units who shall serve at the pleasure of the Dean.

G. Process for Appointing Associate Deans, Assistant Deans, and Department Chairs
   1. Prior to appointing an associate dean, assistant dean, or department chair, the Dean shall seek the advice of department chairs, associate deans, assistant deans, faculty, staff, and students and shall convene an advisory committee.

   2. The Dean may appoint Acting Chairs, Acting Associate Deans, and Acting Assistant Deans at the Dean's sole discretion.

   3. Associate Deans may appoint assistant deans in consultation with the Dean.

ARTICLE II. Committees

A. Governing Council
   1. The Governing Council will be the senior governance body for the School.

   2. The Governing Council will be comprised of all associate deans, all department chairs, the elected chair and a second designated representative of the SPH Faculty Senate, the elected chair of the SPH Staff Senate, a designated representative on behalf of the SPH Student Senate, and other members of the SPH community at the Dean's discretion.

   3. The Dean will chair the Governing Council.

   4. The Governing Council will have approval authority for planning, budgeting, space, school-wide policy setting, and other strategic activities. It will advise the Dean on senior administrative appointments.

   5. The Governing Council will consider matters referred to it by the Dean, the Faculty Senate, the department chairs, and the Student Senate.

   6. The Governing Council will establish and follow formal procedures for gathering written input from the Faculty Senate, the department chairs, and the Student Senate whenever it is considering a major strategic or policy decision. Such procedures will be reviewed as indicated in the SPH policy on procedures for reviewing and approving major policy and planning initiatives, available in the SPH Faculty Handbook.

   7. All standing committees of the School will report to the Governing Council. All committees may have sub-committees to help carry out the work of the committee. All standing committees are listed in the organizational chart in Appendix A of these bylaws.

   8. The Governing Council will meet at least six times per year at the call of the Dean.

B. Administrative Council
   1. The Administrative Council will be comprised of the Associate Dean for Administration, who shall serve as chair, and at least one administrative member from each department.

   2. The council shall:
      a. Implement University policies and practices pertaining to the School's finance, sponsored research, human resources, operations, and compliance-related issues.
      b. Serve as the main communication channel for these policies and practices to the department chairs, faculty, and staff, and, as appropriate, to students.

C. Appointments and Promotions Committee
   1. The Appointments and Promotions Committee will be comprised of at least one member from each department, who shall be appointed by the respective department chair and approved by the Dean, with one member appointed chair by the Dean.

2. The committee will develop and periodically update a formal set of policies and procedures on faculty appointments and promotions. Updates to the guidelines must be compatible with the applicable sections of the University's Faculty Handbook and approved by the Governing Council.

3. The committee shall consider all faculty promotions and appointments in accordance with established policies and procedures. Once approved by the committee, recommendations for appointment or promotion will be made to the Governing Council for their consideration.

4. The committee will keep a current roster of all SPH faculty members.

D. Diversity, Equity, Inclusion, and Justice Committee
   1. The Diversity, Equity, Inclusion, and Justice Committee will be comprised of the Assistant Dean of Diversity, Equity, Inclusion, and Justice, who shall serve as chair, and at least one representative from each department.

   2. The committee shall:
      a. Examine, develop, and support diversity, equity, inclusion, and justice efforts within the School community.
      b. Advise the Governing Council on best practices in diversity recruitment and hiring, creating an inclusive environment, and actions related to diversity, equity, inclusion, and justice.
      c. Serve as the main communication for these best practices to department and unit diversity, equity, inclusion, and justice committees.
      d. Make recommendations for changes in policy as necessary or desirable. Recommendations for significant policy changes will follow the approval procedure outlined in the SPH policy on procedures for reviewing and approving major policy and planning initiatives, available in the SPH Faculty Handbook.

E. Education Committee
   1. The Education Committee will be comprised of the Associate Dean for Education, who shall serve as chair, at least one faculty member from each department, who shall be appointed by the respective department chair and approved by the Dean, and at least one student.

   2. The committee shall:
      a. Consider all matters related to the School's curriculum and academic policies.
      b. Evaluate periodically the School's curriculum.
      c. Review periodically academic policies and procedures.
      d. Make recommendations for changes in policies as necessary or desirable. Recommendations for significant policy changes will follow the approval procedure outlined in the SPH policy on procedures for reviewing and approving major policy and planning initiatives, available in the SPH Faculty Handbook.
      e. Review and approve proposed competencies, degree programs, and courses.

   f. Oversee the School's education prizes and awards.

F. Practice Committee
   1. The Practice Committee will be comprised of the Associate Dean for Practice, who shall serve as chair, at least one faculty member from each department, who shall be appointed by the respective department chair and approved by the Dean, and at least one student.

   2. The committee shall:
      a. Consider all matters related to the School's practice programs and policies
      b. Review periodically practice policies and procedures.
      c. Make recommendations for changes in policy as necessary or desirable. Recommendations for significant policy changes will follow the approval procedure outlined in the SPH policy on procedures for reviewing and approving major policy and planning initiatives, available in the SPH Faculty Handbook.
      d. Oversee the School's practice prizes and awards.

G. Research Committee
   1. The Research Committee will be comprised of the Associate Dean for Research and Faculty Advancement, who shall serve as chair, at least one faculty member from each department, who shall be appointed by the respective department chair and approved by the Dean, and at least one student.

   2. The committee shall:
      a. Consider all matters related to the School's research programs and policies.
      b. Review periodically research policies and procedures.
      c. Make recommendations for changes in policy as necessary or desirable. Recommendations for significant policy changes will follow the approval procedure outlined in the SPH policy on procedures for reviewing and approving major policy and planning initiatives, available in the SPH Faculty Handbook.
      d. Coordinate efforts to develop research clusters and centers.
      e. Manage the School's small grants program.
      f. Review and approve proposed external funding partners.
      g. Oversee the School's research prizes and awards.

H. Other Committees

The Dean may establish other standing and ad hoc committees.

I. Process for Appointing Chairs and Members of Committees
   1. The chairs of the standing and ad hoc committees, except for those otherwise specified in these bylaws, shall be appointed by the Dean.

   2. Additional members of committees may be appointed by the committee chairs subject to approval by the Dean.

   3. Committee membership may consist of faculty, staff, students, alumni, and individuals from

outside the School.

4. Where specific committee members are serving as ex officio members, they will have full voting privileges unless otherwise noted.

J. Conduct of Meetings
  1. A quorum of a committee shall be a simple majority of the members.

  2. A quorum must be present for a formal vote to be taken on any matter.

  3. A simple majority of members present shall be required to approve a measure.

  4. Committees shall retain copies of agendas and make a record of their actions.

ARTICLE III. Faculty

A. Faculty Membership and Voting Privileges
  1. The faculty will be comprised of all persons, at all ranks and tracks, who hold primary, secondary, adjunct, or emeritus appointments at SPH, as indicated in the Appointment and Promotions Guidelines in the Faculty Handbook.

  2. All members of the faculty and staff may participate in discussions at School Assemblies, but only those with primary faculty appointments may vote.

B. Powers of the Faculty
  1. The faculty will have the authority to recommend candidates for degrees.

  2. Whenever a Dean is to be appointed, the faculty will elect representatives to an advisory committee as provided by University policy. Advisory committee candidates shall present their qualifications at a special meeting of the faculty called by the Faculty Senate. Following this meeting, a vote will be taken electronically, and the names of the candidates receiving the greatest number of votes will be forwarded to the University Provost.

C. Duties of the Faculty
  1. Faculty members will carry out teaching, research, service, administration, citizenship, and other duties for such periods as agreed upon with the chairs of their respective departments, the Dean, and the Medical Campus Provost.

  2. Faculty will remain in service throughout the year except for appropriate vacation periods.

  3. Faculty members are expected to attend regular and special School Assemblies.

  4. All members of the faculty will complete an annual review and submit it to their department chair. They will then meet with the chair to discuss the evaluation and the performance

expectations for the coming year.

5. Members of the faculty will also submit other reports as the Dean may require.

D. School Assemblies
   1. School Assemblies, with the Dean or their alternate acting as chair, will be convened at least twice during the academic year.

   2. Forty members of the faculty will constitute a quorum to transact faculty-related business during School Assemblies.

E. The Faculty Senate
   1. The Faculty Senate will be an elected body that represents the faculty of the School.

   2. The purpose of the Faculty Senate is to consider and act, or recommend action, as appropriate, on all matters affecting the academic and professional concerns of the faculty of the School, including any matters as may be referred to it by the Dean or the Governing Council.

   3. The Faculty Senate will be governed by its own bylaws, which it alone will have the power to amend. Those bylaws are available in the SPH Faculty Handbook.

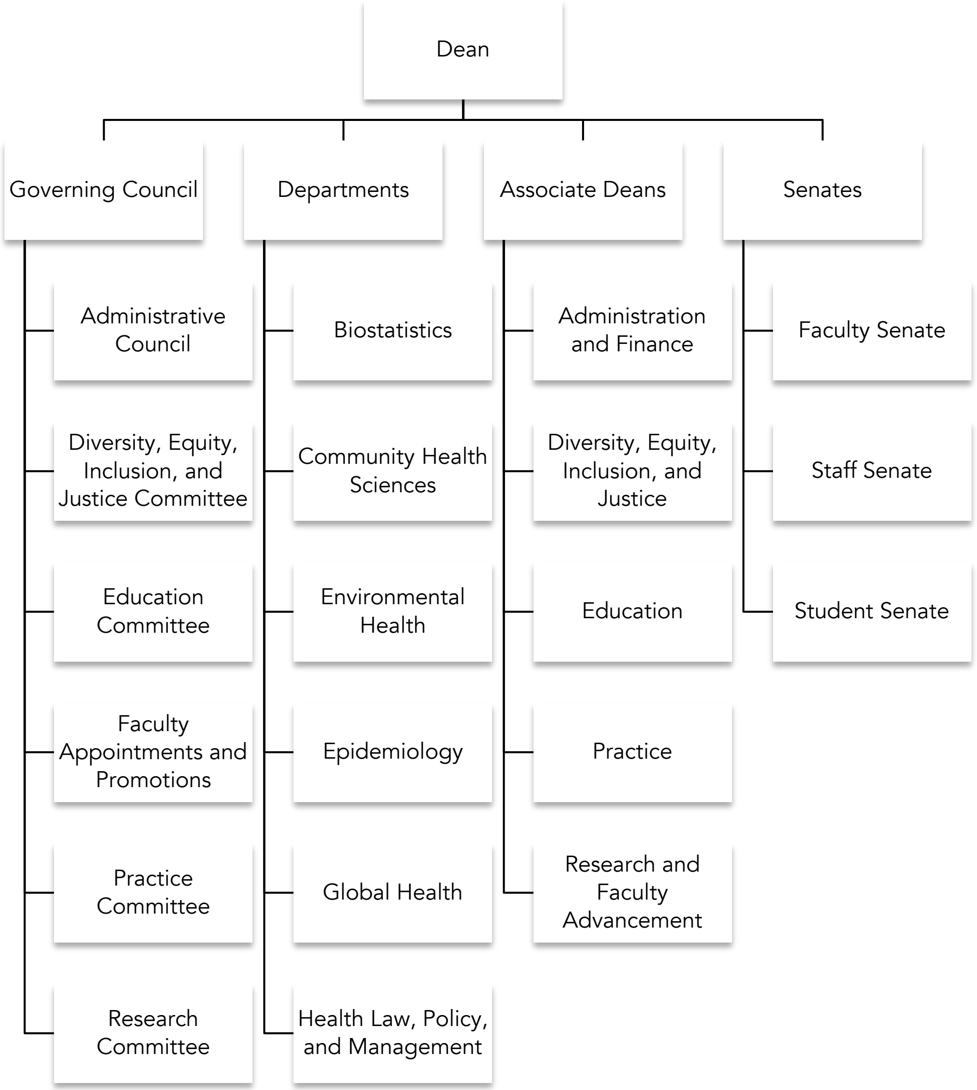
ARTICLE IV. Faculty Appointments and Promotions

The Governing Council, based on recommendations made by the Appointments and Promotions Committee, will adopt policies and procedures for the appointment and promotion of faculty members. The approved policies and procedures for faculty appointment and promotion are available in the SPH Faculty Handbook.

ARTICLE V. Amendments

The bylaws may be amended by an affirmative vote of two-thirds of a minimum of 40 members of the faculty. Prior to voting, the proposed amendment shall be discussed at a School Assembly. The vote may be taken electronically or at a meeting of the faculty. At least a two-week advance notice to the faculty is required prior to a vote on a proposed bylaw amendment.

APPENDIX A: Boston University School of Public Health Organizational Chart*



*BUSPH is home to a large number of units, administrative offices, and centers, as detailed in the Faculty and Staff Handbooks.

BU

Boston University School of Public Health

Mission

To improve the health and well-being of populations worldwide, particularly the underserved, through excellence and innovation in education, research, and practice

Core Purpose

THINK. TEACH. DO.

For the health of all

Strategy Map 2025, 2030 Measures, 5- and 10-year targets, and tactics

MIRROR TO SELF Strategically evaluate BUSPH's operations and activities; build capacity as necessary

1. Faculty, staff, and students of color	Faculty **20%** Staff **40%** Students **40%**	Faculty **25%** Staff **45%** Students **45%**
2. Fully covered faculty	**90%** of faculty	**95%** of faculty
3. Commitment to sustainability	**100%** green office certified **50%** reduction in waste and energy use	**100%** of departments platinum rated Additional **50%** reduction in waste and energy use

- Implement required diversity and inclusion training for all faculty, staff, and students
- Form department/unit diversity and inclusion committees
- Create mentoring program for women and minorities
- Create systems to increase minority supplement opportunities
- Form school-wide sustainability working group, encouraging a healthy workspace for all
- Apply sustainability framework to all purchasing decisions

THE NEXT GENERATION Train the next generation of public health professionals

1. Qualified students	New enrollments: MPH **400**, MS **100**, Doctoral **30**	New enrollments: MPH **450**, MS **150**, Doctoral **30**
2. Enrollment in lifelong learning programs	**500** paid students annually	**1,000** paid students annually
3. Funded practica and research experiences	**75%** funded	**90%** funded
4. Graduate employment	**90%** within 6 months of graduation	**95%** within 6 months of graduation
5. Alumni satisfaction with educational program	**95%** of alumni satisfied	**98%** of alumni satisfied
6. Postdocs working at SPH	**30** postdocs	**50** postdocs
7. Engaged global partnerships	**5** partnerships	**10** partnerships

- Integrate opportunities for both digital and in-person learning throughout educational program
- Build the Select Scholars and Next Generation Scholars programs
- Collaborate with industry and non-traditional partners on PHX courses
- Partner with private organizations to fund predoctoral and postdoctoral trainees
- Create development pipeline and private sector partnerships to fund practica
- Implement ongoing educational evaluation plan

SCHOLARSHIP OF CONSEQUENCE Publish and present frequently cited scholarship

1. Average citations per faculty over five years	**500** citations	**600** citations
2. Professional presentations	**4** presentations per faculty annually	**6** presentations per faculty annually
3. Faculty on editorial boards	**55%** of faculty	**60%** of faculty
4. Diversify research portfolio; partnerships with private sector	**15%** of research funding	**20%** of research funding
5. External funding	**$400,000** per faculty annually	**$450,000** per faculty annually

- Nurture opportunities that seed innovative faculty scholarship
- Increase collaboration on research through senior-junior faculty joint grant submissions
- Invest in collaborations with non-traditional partners through idea hub
- Collaborate with partners across sectors to encourage consequential research and evaluate its impact

BU

Boston University School of Public Health

Values

We are committed to igniting and sustaining positive change that leads to health and well-being around the world. We strive for a respectful, collaborative, diverse, and inclusive community within our School of Public Health. We aim to promote justice, human rights, and equity within and across our local and global communities.

Strategic Research Directions

- Cities and health
- Climate, the planet, and health
- Health inequities
- Infectious diseases
- Mental and behavioral health

Strategy Map 2025, 2030 Measures, 5- and 10-year targets, and tactics

ACTIVIST PUBLIC HEALTH Improve the public's health through service to the local, national, and global community

1.	Faculty, staff, and student-led initiatives consistent with activist public health	**50** per year	**100** per year	▪ Execute comprehensive strategy map for reinvigorated Activist Lab ▪ Partner with BU Days of Service to create SPH and department service activities ▪ Integrate community engagement into faculty development seminars
2.	Community members attending Public Health Conversations	**25%** of attendees	**50%** of attendees	
3.	Faculty leadership on community or health organizations	**50%** of faculty	**60%** of faculty	

THE PUBLIC HEALTH CONVERSATION Lead the public health conversation locally, nationally, and globally

1.	Public Health Conversations	**25** annually **10,000** attendees, annually	**25** annually **15,000** attendees, annually	▪ Regularly train faculty in media relations ▪ Integrate social media workshops into faculty and staff development activities ▪ Execute department-based communication plans that align with SPH communication plan
2.	SPH This Week circulation	**20,000** subscribers	**30,000** subscribers	
3.	Public Health Post impact	**350,000** website visitors, annually	**500,000** website visitors, annually	
4.	Media/social media imprint	**9** media mentions per faculty, annually **50,000** Twitter followers **100,000** Facebook likes **12,000** LinkedIn followers **5,000** Instagram followers	**12** media mentions per faculty, annually **100,000** Twitter followers **125,000** Facebook likes **15,000** LinkedIn followers **10,000** Instagram followers	

INVESTMENT IN THE FUTURE Ensure BUSPH is positioned for long-term financial stability

1.	Alumni who donate	**8%** of SPH alumni	**12%** of SPH alumni	▪ Continue to execute comprehensive alumni engagement plan ▪ Host Alumni and Friends Events to grow alumni base ▪ Build culture of giving for students, faculty, and staff
2.	Students who donate	**50%** of SPH students	**75%** of SPH students	
3.	Unique donors	**1,500** donors	**2,000** donors	
4.	Size of endowment	**$15 million**	**$25 million**	

THE PLACE TO BE Embody the school's values; be the best place to work and learn

1.	School culture	**85%** feel environment is respectful and collaborative **85%** satisfied with diversity and inclusion **85%** feel valued for their work	**90%** feel environment is respectful and collaborative **90%** satisfied with diversity and inclusion **90%** feel valued for their work	▪ Formalize staff career growth opportunities ▪ Implement staff onboarding and mentoring programs ▪ Conduct exit survey for all departing faculty and staff ▪ Ensure ongoing competitive compensation for faculty and staff ▪ Conduct Annual School Review of faculty, staff, students, alumni, and employers
2.	Faculty and staff retention	**80%** of faculty retained for ≥ 5 years **60%** of staff retained for ≥ 2 years	**85%** of faculty retained for ≥ 5 years **75%** of staff retained for ≥ 2 years	

3. Diversity, Equity, Inclusion, and Justice (DEIJ)

A commitment to DEIJ is a moral imperative and consistent with scientific best practices. Organizations promoting DEIJ produce more innovation and better outcomes in business and scientific research.[1-5] For academic institutions, accelerating progress towards inclusive excellence requires a commitment to best practices in recruitment, hiring, retention, advancement, and promotion, as well as to fostering an organizational culture that ensures inclusion, defined as belonging (feeling part of a group) and uniqueness (feeling valued for one's own identity),[6-10] and thriving, defined as a sense of vitality and learning.[11-13] The success of team science, an NIH priority for accelerating innovation in scientific discovery, requires full inclusion of individuals with diverse knowledge, expertise, and experience to maximize creativity and impact, to reduce bias in scientific findings, and to eliminate health inequities.[14] Fostering a culture in the health sciences that allows all to thrive is also essential for building a scientific workforce of the size and talent necessary to maintain US competitiveness.

Boston University: Office of the Senior Diversity Officer (OSDO) and Office of Diversity & Inclusion (ODI)

BU is an urban university founded on a core doctrine of inclusion. Since its founding in 1839, BU has admitted students of diverse races, sex, and religions. Specifically, BU was the:

- 1st US university to admit women to a medical college (1873)
- 1st US university to graduate a Native American MD, Charles Eastman (1890)
- 1st US university to award a PhD to a woman, Helen Magill White (1877)
- 1st US med school to graduate a Black woman, Rebecca Lee Crumpler (1874)
- Graduated & employed on faculty the nation's 1st Black psychiatrist, Solomon Carter Fuller (1897)
- Home of 1st nationwide study of causes & prevention of illness in Black women in the US, the Black Women's Healthy Study (1995)
- 1st US med school to march under its own banner in a Pride Parade (2011)

In keeping with its deep roots in diversity, BU is committed to the ongoing work required to create an environment where everyone can participate and thrive. The culture at BU celebrates inclusive excellence, i.e., research environments that prioritize, cultivate, and benefit from the full breadth of diverse talents to optimize population health.[5,15-18] The University-level efforts on diversity and inclusion are led by the BU Office of the Senior Diversity Officer (OSDO) and the BU Diversity and Inclusion Office.

The mission of the OSDO is to serve as an active, engaged liaison between the University's leadership team and the broader BU community. The OSDO manages three committees: the Antiracism Working Group, which is responsible for examining policies and practices across the University and making recommendations to eliminate bias; the Community Safety Advisory Group, which seeks to enhance responsive and preventative efforts to improve community safety at BU; and the Taskforce on Workplace Culture, which is assessing the perceptions of staff with respect to how welcome they feel in the work environment and is making recommendations for improvements.

The mission of the BU Diversity and Inclusion Office is to coordinate, lead, and accelerate efforts to embody BU's founding principles that higher education should be accessible to all, and research should be conducted in service of the wider community. Since its launch, the D&I Office has grown to include 7 full-time staff positions and established many initiatives, including: University Scholars and Target of Opportunity programs, which host diverse scholars and expand hiring URG faculty; Faculty & Staff Community Networks, which foster inclusion and dialogue in safe spaces and include a group focused on disability support; and the Inclusive Practitioners Cohort Program, which has helped dozens of BU leaders develop skills for promoting DEIJ in their units.

In 2020, BU reaffirmed its commitment to DEIJ by making Diversity, Equity, and Inclusion one of the five pillars of its 2030 Strategic Plan. Since that time, BU has made many important investments, including establishing the Center for Antiracist Research and the LGBTQIA+ center; expanding anti-bias training in faculty hiring; implementing a climate survey for staff; and creating a learning community for URG faculty.

Boston University Medical Campus: Office of Diversity, Equity, Inclusion & Access (DEIA)

The Medical Campus Associate Provost founded faculty development programming on the BU Medical Campus (BUMC) in 2011, emphasizing accelerating diversity and creating inclusive longitudinal programs that have grown to eight annual, year-long faculty programs, including programs for Early Career URG, URG Leaders, Women Leaders, Mid-Career Leaders, and Narrative Writing. BU was the first school in the nation to create a space where faculty could describe their commitments to DEIA in the publicly accessible Clinical & Translational Science Institute (CTSI) faculty networking platform, BU Profiles.

In 2021, the Boston Medical Center (BMC) amplified its commitment to healthcare transformation by launching the BMC Health Equity Accelerator to eliminate health inequities through data-driven insights and community-based research.[19-21] BMC is BU's teaching hospital; all faculty at BMC have primary academic appointments at BU. In 2021 the Lown Institute ranked BMC the #2 most racially inclusive hospital in the US, out of 3208 hospitals.[22] BMC has an institution-wide Glossary of Cultural Transformation, which emphasizes inclusive language. BMC's Review-Based Guidelines for Equitable Assignment of all Leadership Positions was a National Academy of Sciences invited poster.[23]

Boston University School of Public Health: Office of Diversity, Equity, Inclusion & Justice (DEIJ)

We, the Boston University School of Public Health community, believe that fostering diversity, equity, inclusion, and accessibility is essential to fulfilling our mission as an academic public health institution; a mission firmly rooted in social justice. Our commitment to these principles strengthens our voice as a community while elevating our ability to eliminate health disparities locally, nationally, and globally. We maintain and celebrate this commitment through excellence and innovation in research, education, and service.

DEIJ principles are fundamental to a rewarding educational experience; our community benefits from the School's robust, complex mix of backgrounds and perspectives. Under the leadership of the Associate Dean for DEIJ, the SPH DEIJ Office supports and encourages a climate of inclusivity, sensitivity, and open dialogue against the backdrop of critical inquiry. Further, we celebrate and welcome our varied experiences, our multiple and intersectional identities, and diverse perspectives that reflect and promote our multicultural environment. The School's commitment to diversity is demonstrated through our recruitment of a faculty, staff, and students, as well as student organizations, programming, research priorities, curricula, and community practice partnerships. Our commitment to inclusion is demonstrated through our creation of a fair, pluralistic, transparent school community that is welcoming to all who celebrate and participate in our shared ideals of public health through excellence and innovation in our research, education, and scholarship. We demonstrate our commitment to equity by ensuring that all community members—faculty, staff, students, alumni, and others—have access to the tools and support that they need to succeed. Justice is central to the mission of public health, and the School's commitment to justice for all is reaffirmed in our own mission and values. It is our aspiration that our students graduate equipped with the openness and cross-cultural understanding essential to effectively practice public health in the twenty-first century.

Our research and service agendas are deeply enriched by discourse that engages our partner communities, both locally and globally. We believe that effective public health agendas incorporate the experiences and perspectives from the communities we serve alongside. It is our aspiration that our research agenda promote further inquiry and activism and that our community-based partnerships empower individuals, families, and communities.

BUSPH is committed to creating an environment in which all individuals are treated with respect and dignity. We embed the principles of DEIJ in our classrooms, research, hiring, retention, staff and faculty development, student engagement, mission, and values. Our updated 10-point plan provides a framework to organize the work being done at the School and to inform our work moving forward, recognizing that this work is ever-changing and never finished. Each of the ten pillars is listed below:

1. **Institutional Structure** - equitable systems that eliminate structural barriers
2. **Policies and Procedure -** structural and systemic practices that facilitate the success of BIPOC and historically marginalized groups
3. **Resource Allocation** - allocation of resources with an equity lens to fund diversity, equity, inclusion, and justice efforts appropriately and in a way that ensures that the overall spend is in alignment with the commitment
4. **Academic Equity and Student Success** - equitable systems that promote academic equity and student success for all students inside and outside the classroom
5. **Curriculum and Pedagogy** - curriculum and pedagogy that design the classroom experience for academic equity
6. **Hiring, Promotion, and Retention** - structures and policies that promote access and equity in the hiring and promotion process and create an environment that allows all to thrive

7. **Institutional Programming** - regular provision of knowledge and tools to enable the community to act in accordance with the values of the School, engage in healthy discussion, and create an inclusive environment
8. **Education, Training, and Employee Development** - trainings and professional development opportunities for students, faculty, and staff
9. **Campus Climate and Culture** - an inclusive and welcoming community, illuminating and eradicating any inequitable conditions and promoting the wellbeing of all
10. **Admissions and Access** - strategies that expand access of underrepresented students to education at SPH and ensure equity in the admissions process

We recognize that advancing these goals requires a commitment to self-reflection with respect to our programs, research initiatives, curricula, student engagement activities, and all other programming to ensure a process of continual improvement that is ongoing.

SPH Community Resources

BUSPH aspires to create a culture of inclusion where all members of our community feel valued and respected. To that end our Public Health Conversations, including our annual SPH Reads program, engage speakers representing a range of perspectives and identities in informative and thought-provoking discussions.

In partnership with the University's Office of Diversity and Inclusion, BUSPH provides all faculty and staff opportunities to learn new skills through reading groups, annual trainings, and workshops on campus, including on the topics of mitigating microaggressions, understanding diversity, equity, and inclusion, and developing inclusive faculty searches and addressing bias.

Student organizations at SPH are central to the aims of DEIJ and are run, organized, and facilitated by students. Groups have a variety of goals and focus on public health issues, common interests, identities, community organizing, intervention, or current curriculum issues.

The Activist Lab at SPH provides students and SPH community members with the opportunity to develop tools they can use to be effective change agents. The aim of the Activist Lab is to be a catalyst for bold public health practice that disrupts injustice with tenacity and compassion.

Please see the School's Diversity, Equity, Inclusion, and Justice website for the latest DEIJ plan, events, and more: bu.edu/sph/diversity. You are welcome to contact sphdi@bu.edu for more information.

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4. Overview of Administrative Functions and Organizational Charts

Governing Council

The Governing Council (GC) is the senior governance body for the school and has approval authority for school-wide policy setting, and other strategic activities. It advises the Dean on senior administrative appointments. The GC is composed of:

- The **Dean of the School of Public Health**, who is the School's chief administrative and academic officer. The Dean's responsibilities within the School are listed in the bylaws but centrally include: overseeing strategy setting and execution, representing the school to its peers locally and globally, working with senior University leaders on matters pertaining to the School, supervising, planning-budgeting-evaluation cycle; supervising the School's administrative and academic officers, working closely with the members of an external Dean's Advisory Board, and chairing the Governing Council. The Dean's primary reports include all members of the Governing Council except the representatives of the faculty, staff, and student senates.

- The **Associate Dean for Administration**, who oversees the Administration and Finance team and is responsible for all major administrative functions in the School including budgetary planning, financial compliance, space acquisition and allocation, equal employment opportunity (EOO) matters, T-IX matters, and human resources matters.

- The **Associate Dean for Diversity and Inclusion**, who is responsible for our efforts to promote an institutional culture that values and supports diversity; develops, implements, and monitors the School's diversity and inclusion plan; and coordinates a variety of services, events, and programs aimed at enhancing diversity and inclusion at SPH.

- The **Associate Dean for Education**, who is responsible for the academic affairs of the School. The Associate Dean oversees the Education Office and directors with educational portfolios, including the Admissions Office, the Career and Practicum Office, Educational Initiatives, the Registrar's Office, and the Office of Graduate Student Life. The Associate Dean chairs the Education Committee that is responsible for policy setting and implementation around education at the School.

- The **Associate Dean for Public Health Practice**, who directs the Activist Lab, and is responsible for facilitating relationships between the School and non-academic institutions involved in the practice of public health

- The **Associate Dean for Research and Faculty Advancement**, who promotes and coordinates the research program of the School and oversees the Annual Faculty Review process, as well as faculty recruitment, appointment, promotion, and development. The Associate Dean oversees the Faculty Resources Office and chairs the Research Committee, which is responsible for the pilot grant research program and for developing strategies to strengthen the School's research program.

- The **Department Chairs** are responsible for overseeing the education, research, and service activities of the department's faculty and staff. Chairs are also responsible for strategic planning and managing the budget at the departmental level, as well as evaluating performance and supporting the professional development of faculty and staff.

- **Center Directors**, who are responsible for overseeing the scholarship and activities of the faculty and staff associated with each school-wide center. They are also responsible for the planning, budgeting, and evaluation for their center.

- The elected chair and a second designated representative of the **Faculty Senate**. The Faculty Senate is an elected body that includes at least one faculty member from each department. The purpose of the Faculty Senate is to consider or recommend action, as appropriate, on all matters affecting the academic and professional concerns of the faculty of the school, including any matters as may be referred to it by the Dean or the Governing Council. The senate, established in September 2007, has its own bylaws and governing structure.

- The elected chair of the **Staff Senate**. The Staff Senate is an elected body that includes at least one staff member from each department and representatives from school-wide offices. The purpose of the Staff Senate is to consider or recommend action, as appropriate, on all matters of concern to the staff of the school, including any matters as may be referred to it by the Dean, Governing Council, or Administrative Council. The senate, starting in January 2019, has its own bylaws and governing structure.

- A student representative on behalf of the **Student Senate**. The goals of the Student Senate are to disseminate information, support student-initiated projects, and represent the concerns of public health students to the faculty, staff, and university community. The Student Senate is actively involved in community projects, and its members serve on a variety of advisory boards and committees at the School and University.

- The **Assistant Dean for Development and Alumni Relations**, who works closely with the University Development and Alumni Office and oversees the SPH Development and Alumni Relations Office.

- The **Assistant Dean for Marketing and Communications**, who manages the Communications Office and is responsible for communicating the work of the SPH community, both internally and externally.

- The **Dean's Office Chief of Staff**, who is responsible for leading the Dean's Office executive team, shepherding special projects for the Dean, and managing external relations and engagements for the Dean.

Administrative Offices

The School houses a number of administrative offices, each of which has at least one director, a staff member responsible for aligning the activities of the office with the School's strategy map, maintaining a budget, and managing relevant staff members.

- The Activist Lab facilitates collaborations with the community on a broad range of public health issues and programs, including a public health workforce training program.

- The Administration and Finance team manages the School's budget, human resources activities including hiring and staff development, EOO and T-IX matters, and is responsible for the planning and maintenance of the School's space and physical resources.

- The Admissions Office works closely with the MPH Admissions Committee and program-specific committees to recruit students into the School's educational programs. They are responsible for strategic planning for enrollment and recruitment, and implementation of recruiting events.

- The Career and Practicum Office works closely with students and alumni to identify career paths, job opportunities, and practica during their educational program and after graduation. The office also establishes and maintains relationships with an ever-growing list of public health employers, many of whom are alumni of the School. The Career and Practicum Office also facilitates Career PREP, a requirement of the MPH program, which boosts students' skills in networking, resume development, leveraging LinkedIn, interviewing, and negotiating offers. The Office also manages the academic components of the required MPH practicum and awards scholarships to support student practica through Generation Health.

- The Communications Office serves to elevate and increase visibility for the work of the School. Faculty are encouraged to reach out to the communications office when new research is coming out; the office seeks to highlight work across internal distribution platforms as well as local and national media outlets, serving our goals to be leaders in the conversation on public health. The office also advises faculty members on their professional web presence, including BU Faculty profiles, headshots, and utilizing social media outlets, and maintains the SPH website.

- The Dean's Office Executive Team runs the day-to-day operation of the Dean's Office, manages Dean's level events, coordinates programming for leadership, serves as a liaison to relationships outside the school, and completes miscellaneous projects as needed for the School and the dean.

- Development and Alumni Relations is the central point of contact for the School's donors and about 10,000 alumni. The office coordinates numerous alumni events throughout the year, many of which coincide with professional conferences and events held around the globe.

- The Education Office works closely with all SPH faculty, department chairs, associate chairs, and directors to ensure the School is meeting the educational needs of SPH students. The office evaluates and implements new programs, facilitates curriculum development, supports all aspects of teaching and learning, and the evaluation of educational programs.

- The Faculty Resources Office supports the work of the Appointments and Promotions Committee, the Recruitment and Retention Committee, and is a key point of contact for faculty.

- Graduate Student Life (GSL) coordinates co-curricular activities, manages student organizations, and plans social events for all students at the School. GSL also facilitates student support services, including mentorship and academic supports, academic accommodations, student professional development.

- The Registrar's Office is responsible for student records, course records, curriculum scheduling, and advising. The office is the central point of contact for federal, state, and University policies, including FERPA and copyright, and works closely with the Boston University Registrar's Office. The Registrar also serves as the director of academic integrity and oversees the implementation of the university academic code.

Committees

As described in the SPH Bylaws (Section II), the School has five standing committees that meet regularly to review matters pertinent to their areas of responsibility and report to the Governing Council: the Administrative Council, Appointments and Promotions Committee, Education Committee, Research Committee, and Practice Committee.

Membership for the Administrative Council is comprised of senior members of the staff as specified in the school's by-laws. Membership on the four remaining standing committees is comprised primarily by faculty as summarized below.

Each of the four remaining committees includes one faculty representative from each of the School's six departments. These members are appointed by the Dean or their designate in consultation with the department chairs. It is the responsibility of the department chair to ensure that citizenship activities are equitably distributed among faculty within the department, balanced with service contributions, and commensurate with the salary coverage provided. Department chairs may wish to have members who serve on committees by virtue of an administrative appointment (e.g., a program director) also fill the "department representative" spot on a given committee. There are no more than two faculty members on any given committee from any given department.

Membership on each committee by department representatives is for a two-year term, renewable once (i.e., four consecutive years). Department representatives can rejoin committees after a one-year break. Staff and faculty who are members of a committee based on administrative responsibilities will remain on the committee as long as they hold those positions.

The chair of each committee monitors membership and terms to ensure the timely turnover of each committee, as well as ensures there is a suitable transition between committee members and onboarding of new members to ensure continuity. In general, committee membership starts on July 1 of any given year, making committee engagements on an academic year cycle.

A description of each committee and current membership can be found at bu.edu/sph/about/committees

The SPH Organizational Charts

The School of Public Health organizational charts by department are available at https://www.bu.edu/sph/faculty-staff/staff-handbook/ii-the-school-of-public-health/overview-of-administrative-functions-and-organizational-charts/.

Please contact the Associate Dean for Administration and Finance with any questions.

5. Communications

The leadership team and communications office provide multiple tools and events to keep the community informed and to create opportunities to provide feedback.

SPH Today, a daily email, is the backbone of our internal communications strategy. SPH Today includes important announcements and the day's events, and a "Looking Ahead" section that makes note of the signature events coming up over the next four weeks. Any member of the SPH community can contribute to the announcements and calendar section of SPH Today. In addition to SPH Today, the communications team also sends emails regarding our signature events. We also have screens in Talbot, Crosstown, and the Instructional Building that highlight events and other special notices.

SPH This Week, a once-weekly digest of thoughts and activities, is both an internal and external communication channel, with distribution to University leadership, deans and leadership at fellow schools and programs of public health, and other members of the SPH community. It serves as an avenue to highlight current research, education, and practice, and for the SPH community to communicate their ideas more broadly. SPH This Week is home to the weekly Dean's Note and Viewpoints from faculty, staff, and students.

SPH Alumni and Friends is a vehicle to engage alumni and friends of the School locally, regionally, and globally. The newsletter includes upcoming signature programs and events; alumni networking and career opportunities by region; SPH scholarship, research, and practice updates; and featured alumni each month. SPH Alumni and Friends serves as a hub for our broader community that facilitates engagement by sharing opportunities to get involved and give back.

SPH This Year is an annual year in review magazine that does a deep dive into the work of the SPH community. This Year is a print publication with wide circulation to the SPH community, alumni, friends of the School, and public health influencers.

School Assembly is a monthly meeting for all SPH faculty and staff. The meeting has regular discussions led by the Dean, associate deans, and Faculty and Staff Senate, as well as highlights the work of a faculty member and student through brief Think, Teach, Do. presentations.

Department meetings are monthly meetings convened by the department chair to provide updates on university- and school-wide items and discuss department and school business. Faculty votes on proposed appointment and promotion actions are taken as necessary.

Breakfasts/coffees with the Dean are informal monthly meetings for all SPH faculty, staff, and students held separately for each group. The meetings provide a forum to ask the Dean questions informally, discuss current public health challenges, and build a community outside the departments.

Public Health Conversations convene leaders in academia, government, non-profits, and the private sector from across the world and are held throughout the year. Events are free and open to the public, attracting the School community, the local community, and national partners. Information about activities is sent out via the above communication mechanisms. A comprehensive list of programs can be found on the School website.

Faculty, staff, and students who are interested in distributing information to the SPH community should consult the Communications Resources website as well as the Community Messaging Guidelines. The Communications Office is available to promote events or news stories beyond a department and across campus including on campus digital displays, campus-wide email lists, the SPH and BU Calendars, BU Today, and much more.

6. Safety Protocols and School Closure Procedures

In an emergency, dial 617-358-4444. It is best practice to save this phone number in your cell phone so you have it available in an emergency.

a. Emergency Preparedness

The following links provide useful guidelines for students, faculty, and staff on emergency preparedness:

- Prepare before emergencies
- Additional resources

For access to BU premises, everyone must carry their BU Terrier card at all times. At the beginning of each semester, everyone should familiarize themselves with:

- Classrooms, office, or workspace
- The location of the closest emergency equipment (fire extinguishers, AEDs, first aid kits, etc.)
- Two emergency exit routes out of the building
- Evacuation routes and emergency plans
- RACE
- What "shelter in place" means and the BU Shelter in Place Procedures

Staff should also familiarize themselves with their department's Continuity of Operations plans.

b. Prepare Before Emergencies

The best way to stay safe during an emergency is to prepare beforehand. Emergencies may vary from weather incidents to human-made ones. The following links provide helpful guidelines on handling emergencies:

Natural Conditions/Weather Incidents

- Earthquake
- Floods
- Hurricane
- Infectious Disease
- Lightning Strikes
- Severe Weather

Man-Made Incidents

- Active Shooter
- Bomb Threat/Suspicious Package or Mail
- Boston Med Flight Crash
- Protest and Civil Disorder

- Work Place Violence (Code Green)

Protective Actions

- BUMC School Closure Plan
- Evacuation/Shelter In Place
- Family and Community Assistance Center Operations Plan
- Nickerson Field Evacuation

c. Crisis Action Teams

The SPH Crisis Action Team is responsible for ensuring proper communication and collaboration during an emergency to reduce any potential risk. The Crisis Action Team page provides helpful guidance for handling emergency circumstances. The Director of Buildings and Operations maintains a list of Crisis Action Team members.

d. Continuity of Operations Planning (COOP)

A Continuity of Operations Plan (COOP) addresses how critical operations will continue in emergencies and fosters recovery and survival in and after emergencies. A COOP establishes policy and guidance, ensuring that essential functions continue and that personnel and resources are relocated to an alternate facility in case of emergencies. The plan details procedures for:

- alerting, notifying, activating and deploying employees
- identifying critical business functions
- establishing an alternate facility
- providing a personnel roster with authority and knowledge of functions

SPH's COOP is updated annually by the Associate Dean for Administration and Director of Buildings and Operations.

e. Building evacuation procedures, fire marshals, and procedures in the event of a fire

SPH building evacuation procedures

In the event of a fire, call out "Code Red," pull the fire alarm, and dial 617-358-4444 to report the exact location of the fire.

Exit the building using the enclosed stairways. **Do not use the Talbot historic stairs or the elevator**.

Assembly areas:

- Talbot Building – Talbot Green. The green between Talbot and L Building; in the event of inclement weather -- L Building.
- Crosstown Center – retail parking section of the garage on the Albany Street side.

- Fuller Building – Talbot Green. The green between Talbot and L Building; in the event of inclement weather -- L Building.

Fire marshals

Each SPH unit or floor must have a designated fire marshal and alternate fire marshal. These individuals have several responsibilities, including:

- On an ongoing basis, in advance of an emergency:
  - Know the location of the nearest fire alarm pull station.
  - Note the location and designation of the nearest enclosed stairwell. Stairwells in Talbot and Crosstown Center are numbered with the designation posted on a sign inside and outside the door leading to it from the hall.
  - Maintain a list, including name, contact information, emergency contact information, and location of all employees. Make a note of who, if any, may need assistance in evacuating the building. Each department/unit should keep a list of this information on a clipboard that is readily accessible.

- In an emergency:
  - Call for assistance: 617-358-4444
  - Check each room, including restrooms and conference rooms, to alert occupant(s) to leave the building utilizing the enclosed stairwells – **do not use elevators or the historic stairs in the Talbot building** - and to meet at the designated Assembly Area. The Fire Marshal is not responsible for requiring occupants to leave but should make a note of those occupants remaining behind.
  - Ensuring mobility-impaired individuals have assistance to make it at least as far as the enclosed stairwell. If the individual is unable to exit the building, report the person's exact location (stairwell number and floor) to the Control Center (617-638-4144) and the Evacuation Director at the Assembly Area.
  - In the event of a loss of power, check elevators for people stranded in them and report to Control Center (617-638-4144).
  - As time permits, close doors and shut off equipment.

- Upon reaching the Assembly Area, Fire Marshals report to the Evacuation Director noting:
  - Occupants still in offices
  - Individuals stranded in stairwells or elevators
  - The condition of floor/area (fire, smoke, all clear, etc.)

The Evacuation Director reports to the BUMC Incident Commander and then reports to the Boston Fire Department Incident Commander or Liaison Officer.

Occupants should remain outside the building until the Fire Department gives the all-clear, and the alarm is off.

f. School Closure Procedures

When conditions exist that warrant a possible cancellation of classes or closing of a school, or the BUMC, the Provost (or the Associate Provost) will communicate with BUMC leadership to assess the situation and take appropriate action.

- This communication may take place either in person or via conference call that can be facilitated by the ERPD via the BMC/BU ECRS
- When the situation is weather-related, the BUMC Deans' Team Group will be engaged.

Provost	Karen Antman
Administration	Derek Howe, Amanda Bailey
Medical School	Karen Antman
Graduate Medical Science	Hee-Young Park
Dental School	Cataldo Leone and/or Tim McDonough
Public Health	Sandro Galea and/or Lisa Sullivan
Communications	Maria Ober or her designee

For events other than weather-related emergencies, the BUMC Incident Commanders Group includes Nicole Tirella, Kelly Nee and Rob Lowe.

The BUMC ICS Resource Group, consisting of the following people, should be included as necessary to provide information relative to the incident of conditions.

Public Safety	Anastasios Giannopoulos
Emergency Management	Renee Fielding
Facilities	Chris Fernald
Health and Safety	Bob Whitfield
Human Resources	Amanda Bailey

When the decision is made on a full-day closure, delayed opening, or early dismissal, the ERPD will notify the students, faculty, and staff.

The ERPD will notify the BUMC and BU Switchboard Operators of any outgoing emergency notification before being sent.

Emergency Communications and Notifications

Upon a decision to implement a full-day closure or a delayed opening for the entire campus, the BUMC Office of Human Resources shall notify the following media outlets of the status of BUMC:

- WBUR 90.9 FM
- WBZ News Radio 1030 and WBZ-TVWBZ-TV Channel 4 and CBSBoston.com
- WCVB-TV Channel 5
- WHDH-TV Channel 7
- WLVI-TV Channel 56
- WFXT FOX 25 and www.myfoxboston.com

Announcements and information regarding cancellation of classes or patient appointments will be made on these radio and television stations between the hours of 6:00 A.M. to 9:00 A.M.

The EMD is responsible for:

- notifying the BUMC School Closing Group via the BMC/BUMC ERCS
- advising students, faculty, and staff via the BU Alert System
- updating the Emergency Communication web page and all other BUMC web pages
- providing continuous updates during the event
- updating the BUMC Emergency Information Telephone Line
- requesting that each school update its web page

7. Data/Information Protection and Confidentiality

The School of Public Health (SPH) maintains information in school databases that is sensitive and valuable, and is often protected by federal and state laws which prohibit unauthorized use or disclosure. Employees with access to sensitive University and SPH data/information must comply with federal and state laws, in addition to BU and SPH policies that govern such data/information. Hence, the ensuing information applies to each employee performing a service on behalf of BUSPH. The following information serves as a reminder to each of us of our obligations and responsibilities in the use of any BUSPH data and information.

Information falling under the obligation to protect and keep confidential includes, but is not limited to:

- Personally identifiable information (PII) about faculty, staff, students, parents, alumni or donors (i.e., social security numbers, dates and places of birth, mother's maiden names, credit card numbers, bank account numbers, income tax records, drivers' license numbers, etc.).
- Student education records as governed by the Family Educational Rights and Privacy Act (FERPA) and student and staff medical records as governed by the Health Insurance and Portability and Accountability Act (HIPAA).
- University business information (e.g., financial reports, human resource records, internal reports and memos, contracts, strategic reports, surveys, etc.).
- Information about or provided by third parties (e.g., information covered by non-disclosure agreements, contracts, business plans, non-public financial data, computer programs, etc.).

Multiple University and SPH policies pertain to the appropriate management of institutional information and technology. All employees, as custodians of such information, must fully comply with these policies. A list of University and IS&T policies are available at http://www.bu.edu/tech/about/policies/.

Among other things, data/information protection and confidentiality require that:

- Employees may only access information needed to perform work-related duties. Unless expressly authorized in writing by one's supervisor, an employee may not look up, review, analyze, disclose or disseminate restricted or confidential institutional information outside the scope of my University and School service, even if they have access to such information. Further, all employees are prohibited from making unauthorized changes to institutional data/information.
- Employees must protect University and SPH data/information confidentiality, integrity and availability of information from any unauthorized disclosures and dissemination. Employees may not share University or SPH information, or access, with any unauthorized individual, whether internal or external to SPH and Boston University at large. Employees may not ask for personally identifiable information (PII) except for where there is a legitimate business need.
- Employees must safeguard any physical key, ID card or computer, network account, username and password that enables access to University and SPH information. Employees

may not facilitate anyone’s illegal or unauthorized access to BU SPH’s administrative, financial and any other type of systems, or compromise the integrity of the systems’ information by sharing passwords, or other access information or devices.

All employees are bound by the aforementioned guidelines and must take all reasonable, necessary, and appropriate steps to safeguard private data from disclosure or dissemination to anyone except as permitted by policy. Violation of such policies may subject an employee to possible disciplinary action up to and including termination of employment with Boston University.

8. Commonly Used Software and Systems

BUSPH staff and faculty may need to access a variety of university systems, depending on their positions. Access should be requested through direct managers and may require additional levels of approval. Whenever possible, managers should request access to all systems needed for new staff members, using established policies, within the first week of employment.

There may be additional department-specific tools that are handled locally. Headings are provided as general guidance to the function area; systems may cross function areas. For example, Business Link and Faculty/Staff Link may be used by staff that handle administrative, academic, or finance functions.

Administrative/Travel/Other	
System	Function
25Live	Room scheduling
Adobe Pro	Documents/Forms
BUMC IT	IT Helpdesk/Access requests/ Software
Concur	Travel planning and reimbursement
Facilities Service Request (FSR)	Internal space repair/upgrade request
Internal Service Request (ISR)	Internal goods/services request
SAS	Data management/analysis
Campaign Monitor	Communication
Microsoft Teams	Web conferencing and document sharing software
One Drive	Electronic file system
TerrierTemps	Temporary employee requests and placement
WordPress	Website updates
VPN	Remote computing
Y-Drive	Central electronic file system
Zoom	Web conferencing software

Education	
System	Function
Faculty/Staff Link	Class schedule and student management tool
WebAdmit	Application management tool

Finance/Reporting	
System	Function
Business Link	Financial and administrative functions; student employment
PCard	Reconciliation and approvals
Procurement (SRM)	Purchasing
BUWorks/SAP	Financial management, human capital management, procurement

WebGUI	BU's General Ledger system

Research	
System	Function
BIO-RAFT	EHS compliance
Click – IACUC	IACUC compliance
eraCommons	Grant administration
FastLane	Grant submissions
Grants.gov	Grant administration and submissions
NSPIRES	Grant submissions
Sharepoint	COI + tracking tools

III. Staff Senate

The Staff Senate is an elected body that represents the staff of the School. Its purpose is to consider and act, or recommend action, as appropriate, on all matters affecting SPH staff, including any matters as may be referred to it by the Dean or the Governing Council. The Staff Senate is governed by its own bylaws, which it alone has the power to amend.

1. Staff Senate Bylaws

Article I: Organization

A. Membership of the Staff Senate

The BUSPH Staff Senate shall represent all non-faculty persons in established positions and not temporary/casual or student positions at BUSPH. The Senate will be elected by eligible staff members who are employed at least 75% effort within each department and unit. No single unit will have majority representation on the Staff Senate.

The different departments of the school are divided into units, as listed below. Each unit shall elect one representative from its staff, for a total of 8 unit representatives.

- Unit 1: Central Administration (Dean's Office, Marketing and Communications, Development and Alumni Relations, Activist Lab, Administration and Finance, Research and Faculty Advancement)
- Unit 2: Education (Education Dean's Office, Registrar, Career and Practicum Office, Lifelong Learning, Admissions, Graduate Student Life)
- Unit 3: Biostatistics and Epidemiology Data Analytics Center
- Unit 4: Department of Biostatistics and Department of Epidemiology
- Unit 5: Department of Community Health Sciences
- Unit 6: Department of Environmental Health
- Unit 7: Department of Global Health
- Unit 8: Center for Health Law, Ethics & Human Rights, and Department of Health Law, Policy, & Management

In addition to the unit representatives, up to five at-large members will also be elected by the BUSPH staff for a total of 13 Senate members.

B. Terms of membership

The terms of office for elected Senate members shall be two years. Membership is linked to the calendar year and terms start January 1. An individual is not eligible for re-election for one year after leaving office, but the total number of terms a member may serve is not limited. If a member was elected with less than six months of the term left, they are eligible to serve in the next consecutive term.

C. Eligibility

Each Senate member must be a full-time employee with at least 75% effort in established positions and not temporary/casual or student positions, for a minimum of at least nine months of continuous service at BUSPH for annual elections OR a minimum of at least three months for special elections. Students, members of the Administrative Council, Faculty, Associate Deans and Deans within BUSPH are not eligible to participate on the Staff Senate.

Article II: Elections & Vacancies

A. Elections

Voting will happen in the late fall each year and specific dates will be announced annually by the incumbent Senate Chair. Any staff member who wishes to serve on the Staff Senate should submit a brief statement, not to exceed one page, to their unit representative, detailing why they would like to serve on the Senate at least 4 weeks prior to the voting. These statements will be made available to the entire school community to help inform voting. Staff will not be considered for a position without submitting their statement.

Elections for unit representatives will be held within each unit. Elections for at-large members will be held BUSPH wide. Elections will be set up by the Vice Chair, allowing one confidential vote per eligible staff member.

B. Vacancies

If a unit representative steps down prior to the regularly scheduled election, a special election will be held by the unit before the next Staff Senate meeting to fill that vacancy. The procedure and eligibility will be the same as described in the section "Elections" above. If an at-large member leaves prior to the regularly scheduled election, a special election will be held to fill the position if there are more than five months left in the term. Otherwise, that position will remain unfilled until the regularly scheduled election.

C. Voting Rights

All permanent and temporary staff persons working at the school can vote. The unit representative will be voted in by all such persons within that unit. At-large members will be voted in by all such persons at BUSPH.

Article III: Staff Senate Officers

The Staff Senate shall elect from its membership the following officers: Chair, Vice-Chair, and an Administrator. Each elected officer will serve a one-year term with the possibility for re-election. Officers can serve a maximum of two consecutive years. Officers shall be elected in accordance with the Staff Senate Bylaws under "Membership."

A. The Staff Senate Chair shall at a minimum:
  - Preside at all regular and special Staff Senate meetings.
  - Regularly communicate with Dean and Associate Deans.
  - Liaise with People Services on issues, announcements, and regular communications.

- Responsible for the staff portion of the Annual School Survey in partnership with People Services.
- Presents monthly Staff Senate updates at BUSPH School Assemblies.
- Represent the Staff Senate at the Governing Council and Admin Council.
- Appoint members to sub-committees.
- Designate chairs of sub-committees and task forces as appropriate.

B. The Staff Senate Vice-Chair shall at a minimum:
  - Preside in the absence of the Staff Senate Chair and assume their duties when the Chair is unavailable.
  - Prepare an agenda in collaboration with the Senate Chair and post online seven (7) days prior to the next regular meeting.
  - In collaboration with the Administrative Officer, schedule all Staff Senate meetings including calendar invites, reserving meeting space and catering orders.
  - Liaise with People Services on issues and data inquiries for the elections.
  - Manage the election process for annual elections and special elections, allowing one confidential vote per eligible staff member. This includes posting statements from Staff Senate at-large candidates.

C. The Staff Senate Administrative Officer shall at a minimum:
  - In collaboration with the Vice Chair, schedule all Staff Senate meetings including calendar invites, reserving meeting space and catering orders.
  - Record attendance and advise the Staff Senate Chair if a quorum is present at the beginning of each meeting.
  - Prepare minutes of all Staff Senate meetings and maintain them as permanent records. Distribute copies of approved minutes to each member within ten (10) days after meetings, and publish approved minutes on the Staff Senate website.
  - Maintain all records of the Staff Senate including the list of senators serving on the Staff Senate. This includes electronic file maintenance and email maintenance.
  - Coordinate and publish information for Staff Senate website in collaboration with Communications.

D. Members
  - Work to the fulfillment of the goals and objectives as outlined in the SPH Staff Senate mission statement:

    > The Staff Senate represents the interests of the staff in order to strengthen relationships and foster a climate that promotes and empowers staff to participate in the shared governance of Boston University School of Public Health (BUSPH). Its purpose is to consider and act, as appropriate, on all matters affecting professional concerns of staff. The Staff Senate shall promote the exchange of information and provide a forum for expressing views on matters relating to personal and professional well-being, staff development, school culture, community and SPH and University policies.

  - Attend and participate in regular and special Staff Senate meetings, giving reasonable notice to the Administrative Officer if unable to attend.

- Department representatives should maintain regular communication with constituents.

Article IV: Meetings and Procedures

A. Meetings

- Meetings shall be conducted according to Roberts Rules of Order, or other established meeting guidelines.
- Staff Senate meetings will be held at least 6 times per year.
- BUSPH will support flexible work hours to allow senators to participate in Senate events and activities.
- All BUSPH staff are welcome to the Staff Senate meetings except when agenda items are under executive session. An executive session is limited to all elected senators and anyone specifically invited to attend by the Chair/Vice-chair.
- Special meetings may be called by the Chair, written petition of at least five senators, or 25 staff members.

B. Procedures

- The Chair/Vice-chair and officials will prepare the meeting agenda in advance.
- A quorum of the Senate shall be defined as two-thirds of voting members. A quorum must be present when a vote on official action is taken. The decision of a majority of those voting shall constitute official action of the Senate.

Article V: Absences and Proxy Voting

Senators are expected to attend and participate in each meeting. If a senator is unable to fulfill their responsibilities on the Staff Senate, the senator should formally resign. Any senator's resignation should be communicated to the Chair.

Absentee voting and proxy voting are not allowed. Attendance at monthly Senate meetings and special meetings shall be recorded as "Present," "Excused," or "Absent". Continuous absences by a senator will be reviewed by the Senate Chair and appropriate action will be taken if necessary.

Article VI. Committees

The Staff Senate may see the need to establish committees to explore specific topics further. Each committee will have at least two (2) Senate members and may seek additional participation from interested staff who may or may not be a member of the Senate. The Chair will appoint a committee chair when appropriate. Committees will be dissolved when final recommendations are submitted to the Senate. Committees may overlap Senate membership terms.

Article VII. Amendments

Amendments or any modification of the bylaws may be amended, revised or repealed at any regular meeting of the Senate by majority of those Senators present and voting. A full statement of the proposed amendment must be submitted in writing at least 25 days prior to a vote.

IV. Staff Expectations

1. Expectations of Ourselves at our Best

This collection of expectations emerged from an all-school retreat discussion on September 7, 2018. The Governing Council made final edits and approved this for inclusion in all syllabi and Faculty, Staff, Student, and Handbooks on November 29, 2018. These are expectations all members of our community, faculty, staff, and students, hold ourselves to, aspiring always to be our best selves.

We all aim to:

- strive for excellence
- exercise the highest integrity in all aspects of work
- be open, flexible, realistic, and understanding
- demonstrate professionalism and trustworthiness as a representative of Boston University and the School of Public Health
- understand and follow the policies and procedures of Boston University and the School of Public Health

We aim to be guided by five behaviors, with corresponding expectations of ourselves for each behavior:

Behavior	Expectations
Engagement	▪ Embrace responsibility for our work, learning, and all other activities ▪ Work responsibly and collaboratively
Collaboration	▪ Receive constructive feedback from faculty, teaching assistants, mentors, and others ▪ Openly share expertise and experience to assure individual and team success
Communication	▪ Provide constructive feedback to your colleagues, which include supervisors, staff, faculty, and students ▪ Seek support when needed ▪ Use technology in a responsible and professional manner
Respect for others	▪ Respect the unique cultures, strengths, viewpoints, and experiences of others ▪ Show compassion and tolerance ▪ Actively and respectfully participate in community discussions and activities

Helping others succeed	▪ Reach out to others who appear to be struggling ▪ Seek ways to contribute to the success of others

The School of Public Health recognizes that collaboration and mutual respect are central to developing a positive relationship between faculty, students, and staff members, the development of which is critical to our mission. The School of Public Health values academic freedom, diversity and inclusion, and respect for all. We strive for a sense of community in which the individual growth of all members is advanced through the cultivation of mutual respect, tolerance, and understanding. SPH encourages individuality and the culture of freely pursued academic and community activities. We all are working towards a common goal; our ability to excel depends on a collegial environment.

The School of Public Health seeks to create opportunities for the school community to interact across departments and also to engage with pressing topics in public health. To that end, the Dean’s Office hosts community programming and signature programming open to all members of the SPH community. Community programs include three annual events for all faculty and staff (the annual All School Retreat, Holiday Party, and Spring Celebration), monthly School Assembly, and monthly coffee chats with the Dean. At the monthly School Assembly, the deans present updates on policies, school strategies, and ongoing work of the School. SPH faculty and staff are responsible for staying up to date with school and university policies and mandatory trainings. The Dean’s Office hosts around 25 Public Health Conversations annually. All faculty and staff are invited and encouraged to attend.

2. Staff Expectations

a. Collegiality and Professionalism in the Workplace

SPH has a tradition of collegiality and shared governance and strives to maintain these standards as a mainstay of its culture. Collegial interactions are those that occur among and between colleagues, subordinates, supervisors, administrators, and other individuals within SPH and BU at large. Collegial interactions are essential to support our values in an effective, efficient, and ethical manner.

Collegiality represents an expectation of a professional relationship among colleagues with a commitment to sustaining a positive and productive work environment -- critical to the progress and success of the SPH community. Collegiality consists of collaboration and a shared decision-making process that incorporates mutual respect for similarities and differences, whether it's in background, expertise, judgments, and points of view, in addition to mutual trust. Central to collegiality is the expectation that members of the SPH community remain individually accountable to conduct themselves in a manner that contributes to the SPH's academic mission and high reputation. Collegiality among associates involves a similar professional expectation concerning constructive cooperation, civility in discourse, and engagement in academic and administrative tasks within departments and in relation to the institutional life of the School and University as a whole.

A documented pattern of frequent and pervasive activity that interferes with fostering a safe and professional work environment or a blatant act of unprofessionalism will constitute a violation of this policy. Such allegations will be examined in a reasonable, objective, and expedient manner, and following applicable federal and state labor laws, as well as School and University processes and procedures. This policy is per Section IV of the University's Employee Handbook, capturing the policy on harassment and code of conduct.

b. Staff Policies

The School of Public Health follows Boston University definitions, policies, and benefits for staff, as defined in the University Employee Handbook. This section of the handbook details how these university-wide policies and practices are applied at the school. Staff should contact the Associate Dean for Administration and Finance with any questions about expectations and Human Resources with questions about employment type and/or benefits.

Work Schedules and Hours of Work

The regular workweek at the School of Public Health is forty (40) hours. For computing payroll, a workweek consists of seven (7) consecutive twenty-four (24) hour periods beginning at 12:01 a.m. on Monday and continuing through midnight the following Sunday. Regular work hours are 8:30 AM to 5:00 PM. Student-facing offices are open through 6:00 PM, and managers in those offices may make alterations to the work hours to ensure continuity of operations and proper staffing.

Managers are responsible for properly communicating work schedules for their employees. For exempt employees, the regular workweek represents the minimum hours that an employee is expected to work. Exempt staff may be required to work at SPH or departmental events, including but not limited to orientation and convocation ceremonies. Non-exempt staff who volunteer to work at SPH or departmental functions, including but not limited to orientation and convocation, will be paid their regular hourly rate for all hours worked at the event. Non-exempt employees also receive one-and-one-half (1-1/2) times their regular hourly rate for all hours worked over forty (40) hours during the workweek.

Staff and managers should adhere to the University policies on meal and rest periods available in the Employee Handbook.

Attendance and Punctuality

Attendance and punctuality are crucial. It is the responsibility of each SPH employee to communicate with their direct superior promptly, accounting for any late arrivals, early departures, or absences from work. All SPH staff are expected to be present for work, on time, every day. Regular attendance and punctuality keep our team and SPH operating. Arriving late, being tardy, or chronically absent causes disruptions. Employees are required to report an absence by calling, texting, or emailing the direct supervisor. Employees must report each day they are absent. Failure to notify the immediate supervisor of an absence one hour before the start of the workday will result in a no call/no show. Attendance infractions reset every year.

SPH recognizes that there are times when employees will have an authorized absence from work and will follow BU HR's outlined policies in place at the time. Planned absences from work require advance notification and approval. Requests should be submitted to the manager and input into SAP before the absence. For sick time, managers should be notified immediately, or in advance of the next scheduled work period. Failure to comply with the established procedures for attendance and absences will result in progressive disciplinary action up to and including termination.

Excessive absenteeism without proper justification may qualify for disciplinary action. If an employee is absent for three or more consecutive days, evidence for excusing the absence, such as a physician's note, must be provided to Human Resources by contacting the respective Human Resources Business Partner for SPH. If an employee is a no call/no show for three or more consecutive days, this will be considered job abandonment or termination without notice.

Employees may request exceptions for work absences from Human Resources. Approval is on a case-by-case basis.

Excused Absences.

As described in the Employee Handbook, funerals, jury duty, bereavement, childbirth, a car accident, medical appointment, and inevitable emergencies are excused absences. Employees must provide documentation to justify the absence.

Absences due to bereavement, jury duty, or military duty are exempt from disciplinary action, as are FMLA and ADA related absences. Bereavement, jury duty, and military exemptions require proper documentation to a manager within 48 hours of the absence.

Extended Absences

Employees who need to take an extended absence from work should work closely with People Services and Human Resources to identify the appropriate course of action. Please see Time Off and Leaves of Absence for more information. When advance notice of the extended absence is possible, employees should work with their managers to make arrangements for the work that needs to be completed while they are away.

Remote Work

The School of Public Health aims to foster a community, that is available to support our students and each other. Staff may be permitted to engage in remote work, whether partially or fully, in accordance with Boston University Remote Work Guidelines. Further information regarding remote work at BU may be accessed here. A toolkit has been developed for Employees and Managers on the request process, tips on becoming successful at remote work, and setting up your remote work space. In order to be considered for a Remote Work Arrangement, an employee must submit a request through the Remote Work Arrangement Request Process. Such a request will require the employee's manager, as well as the Dean or Dean's designee to review and approve the employee's request. In addition, if an employee's remote work location is outside of Massachusetts, the Vice President for Human Resources must also review and approve such request.

Remote work consideration and approval must be in accordance with SPH business needs. Supervisors should also have an eye toward equity among staff in the department or unit. Supervisors may approve or deny a remote work or flexible schedule request to meet work requirements. Approved flexible work schedules are those that sustain or enhance employees' ability to complete the functions of their job without presenting an undue inconvenience to the School of Public Health, its clients, or the employees' departments. If approved to work remotely, employees are expected to be responsive via email, available for phone calls and meetings, and actively participating in work, particularly during core hours. If an employee is mostly unavailable when working remotely, the appropriate supervisor will be required to issue a verbal warning to the employee, and if the issue persists, subsequently consider terminating the agreement to work from home. The arrangement may be reviewed and changed at any time.

Requirements for a remote work agreement may be altered during extraordinary circumstances such as a pandemic, etc. In such situations, managers will communicate accordingly with employees to advise them of applicable policies and practices thereof as a result of such exigent circumstances.

SPH does not fund the purchase of any durable goods or services, as well as potential coverage of fees, to equip employees' home offices. Working remotely is a personal choice rather than a mandate by SPH. As such, it is implicit that a remote environment where you choose to conduct work is conducive to supporting your daily activities in support of business operations. While you are always welcome to return to work on premises, perusing all equipment as needed (printers, headphones, desktops, etc.), SPH will not engage in the purchase of additional equipment beyond what is necessary to conduct your work on SPH premises.

This FAQ document provides helpful guidance vis-à-vis remote work protocols and procedures.

MPH Practicum for SPH Staff

SPH employees also enrolled as students may discuss with their supervisors whether they can do their practicum at SPH. While this may prove convenient, should such a request be granted, please note that in such a case the practicum will not be a paid one.

c. Complaint Procedures

SPH encourages, promotes, and expects collegial and professional conduct from any employee, work environment that exudes effective communication, constructive feedback, and attempts to resolve complaints, where possible informally. The School also strongly encourages efforts to resolve issues at the unit or departmental level with those alleged to have engaged in unprofessional conduct. Employees should freely reach out to their direct supervisor, Department Administrator, or the Associate Dean for Administration with any concerns alleging a violation of the University’s Code of Conduct, seeking proper resolution in a manner that is conducive to fostering a collegial and collaborative work environment. Any personnel/employee relations matters may be brought directly to the Associate Dean for Administration who may involve the Human Resources Business Partner assigned to SPH or the Ombuds Office as appropriate, adhering to established confidentiality protocols as appropriate and applicable.

Unprofessional activity often leads to a hostile work environment. Unlike discrimination or harassment, unprofessional conduct may not necessarily be targeted at a particular individual at the workplace, for it to have spillover, negative impacts on the work environment as a whole. Such behavior shall be considered a violation of the SPH and Boston University’s professional code of conduct.

Any administrator, faculty, or staff member who experiences or witnesses possible unprofessional conduct has the right to report this activity, providing supporting evidence to the SPH Associate Dean for Administration.

In the absence of a resolution through an informal process, the allegation or complaint may be submitted by any party (staff member or supervisor) for formal review to Human Resources, according to the University's Employee Handbook, Section 206, Employee Grievance Process.

Additional guidelines around professionalism in the workplace is available in the University Employee Handbook, Section 401.1, Professional Standards of Conduct under the University Rules of Conduct.

3. Annual Staff Review

The School of Public Health aims to build a community and culture that attracts, motivates, develops, and recognizes people who do amazing work. One way we can achieve this is through the Annual Staff Review, a formal annual assessment of all staff conducted across the University. As detailed below, managers are encouraged to give feedback to their team regularly throughout the year, and the Annual Staff Review serves as a formal summary of those check-ins of performance-related discussions and sets a plan for the year ahead.

Ongoing Feedback and Quarterly Reviews

Managers and employees are encouraged to have ongoing one-on-one conversations about work progress, goals, performance to date, and a plan of action going forward. These conversations embrace the principles of continuous quality improvement and seek to build a broader view of the accomplishments and progress of the employee throughout the year.

All SPH staff managers conduct quarterly performance and development check-in meetings in January, April, and July. The Annual Staff Review is conducted each September/October. During quarterly check-in meetings with each staff member, managers recognize successes and offer correction and suggestions for development opportunities. Staff are encouraged to bring their ideas for development and feedback for supervisors. Discussion topics may include, but should not be limited to, short and long-term goals, recent accomplishments, and revising goals with the employee. The development aspect should focus on the needs of the employee, performance and conduct gaps, and development and career goals.

The School of Public Health prides itself on fostering an environment that is empowering and collaborative for both employees and managers. Regular check-in meetings encourage a continuous conversation about performance and development in the effort to best support the staff member and the business needs of the School.

Annual Staff Review

The University-wide performance evaluation and merit review process for staff commence annually in September. The performance review is a formal discussion between an employee and manager, focusing on the degree to which the employee reached goals set during the previous year. Ratings of accomplishments are given, and a new plan of action is determined for the upcoming year.

Staff are encouraged to prepare for their annual review by reviewing the accomplishments and challenges they had since their last review and identifying key areas of development for the upcoming year. Supervisors complete a written performance evaluation for each direct report, highlighting key accomplishments and contributions, opportunities for development and improvement, and goal setting for the upcoming year.

The School of Public Health conducts performance reviews as mandated by BU Human Resources, according to the Performance Management process.

For support and guidance on how to conduct a performance discussion or for any assistance with employee performance issues, please reach out to the Associate Dean for Administration.

V. Staff Awards and Professional Development

1. Staff Awards and Recognition

The BUSPH reward and recognition program serves to reward and reinforce actions and behaviors that exemplify the School's mission, as well as celebrate individual successes and achievements. BUSPH is fully vested in recognizing and rewarding employees for exemplary service to our community, recognizing the impact of significant contributions made by employees, thus striving to maximize employee job satisfaction. BUSPH firmly believes in the team-spirit of our community and the importance of fostering a culture of employee engagement, encouraging a sense pride in one's work while promoting loyalty to our employees, attracting and retaining top talent.

Employee recognition can be given in many ways and is most effective when it takes place on a regular basis through a variety of mechanisms.

Recognition from Managers

Recognition from managers can be very powerful. When done in a meaningful and purposeful way, it will enhance staff engagement and development. Recognition is unique to what drives and motivates individual staff members. When deciding on the type of recognition, think about ways staff members would like to be recognized. Recognition for outstanding contributions and achievements can be during 1:1 meetings, department meetings, or even at school-wide events.

A few ways managers can recognize staff employees include:

- Publicly praise employees by calling attention to their achievements. This can be in an email, internal newsletter, group meeting, or another appropriate forum
- Hosting a recognition lunch
- Having the employee lead or take ownership of a project
- Providing opportunities for the employee to cross-train or job shadow

For additional ideas on recognition, please consult department administrators, unit leaders, or the Associate Dean for Administration.

Think.Teach.Do Staff Awards Program

The *Think. Teach. Do.* Staff Awards Program is modeled after the credo, "**Think. Teach. Do. For the Health of All**", which represents the core purpose of BUSPH. These three award categories recognize SPH staff members whose contributions have positively impacted SPH departments or the school as a whole. The objective of this Awards Program is to develop a recognition system aimed at enhancing team morale and staff resilience while rewarding staff excellence at BUSPH. It is also designed to stimulate innovation and novel approaches to work-related tasks/projects that benefit departments or SPH as a whole. All BUSPH part-time and full-time staff are eligible.

Awards will be given to up to two (2) staff members in each of the three categories on a quarterly basis (up to six awards, four times per year). Awardees will be announced during all-school assemblies. Barring any unusual financial/budgetary challenges the school may experience, each recipient will receive a pre-tax award of $400 dollars.

Award Categories

Think - Innovation, Research Activities, Program Development
The **Think.** Award is presented to an individual who has demonstrated exceptional innovation in research activities, program development, or the creation/ implementation of tools and systems that dramatically improve processes within a unit or SPH as a whole. Efforts meritorious of this award advance the strategic priorities of SPH.

Teach - Mentorship, Advising, Training, Facilitation
The **Teach.** Award is presented to an individual whose collaborative work has had a positive impact within the SPH community. They may have taken ownership of key concerns and needs, acted on opportunities, solved problems, or brought people and resources together to make processes more efficient/accessible for others.

Do - Community Service, Diversity & Inclusion, Community Support, Grant Management
The **Do.** Award is presented to an individual who has created extensive opportunities for others toward community building and making connections through programs, policies, and/or spaces. These efforts should honor the experiences of various populations and reflect the BUSPH core purpose to spark social change, foster a sense of belonging, and build relationships across differences.

The full outline of the Think.Teach.Do Awards Program can be found in the Forms and Resources section of the Staff and Operations Handbook. To recognize an employee for their outstanding contributions consistent with the Think.Teach.Do mantra, please submit your online nomination form.

Excellence Awards

Excellence Awards recognize truly exceptional contributions made by SPH staff members that are critical to the continued success of the School. Excellence Awards honor excellence and achievements by SPH staff members playing key roles in collaboration, leadership, mentorship, or training.

- Excellence in Collaboration: Recognition of an individual who has played a key and potentially under-recognized role in making a complicated collaboration between multiple groups successful. This could include an individual who has gone above and beyond to enable collaborative and successful work.

- Excellence in Leadership: Recognition of an individual who has played a vital role in the leadership of personnel, resource(s) or project(s).
- Excellence in Mentorship or Training: An individual who has played a key role in teaching, guiding, or being a role model for other staff. The nominee for this excellence award does not have to be a formal mentor but rather an individual that seizes opportunities to educate and guide others around them.

A call for nominations for excellence awards is announced each spring via SPH This Week. All SPH staff are eligible for these awards. This award may be given more than once to the same individual, but at least five years must have passed since a recipient received the award previously. Nominations should highlight contributions and achievements made within the past 12 months. Awards are selected by a committee comprised of staff and school leadership.

Excellence awards are given each spring at the school-wide SPH awards ceremony. Barring any unusual financial/budgetary challenges the school may experience, recipients receive a commemorative certificate and a monetary award.

The Dzidra J. Knecht Staff Award for Distinguished Service

The Dzidra J. Knecht Staff Award for Distinguished Service is the highest school award for service that can be given to a staff member at SPH. Recipients have made outstanding and sustained contributions to the administrative functioning of their department, and therefore the School of Public Health. The recipients of this award exemplify all that the School stands for in both accomplishment and citizenship arenas.

A call for nominations for the Knecht award is announced each spring via SPH This Week. All SPH staff are eligible for these awards. This award may be given more than once to the same individual, but at least five years must have passed since a recipient received the award previously. Individuals who have retired from SPH within the previous 12 months are eligible for this award. Awards are selected by a committee comprised of staff and school leadership.

The Dzidra J. Knecht Award is given at the school's convocation ceremony. Barring any unusual financial/budgetary challenges the school may experience, recipients receive a commemorative silver bowl and a monetary award.

For additional information on staff awards, contact the Associate Dean for Administration.

2. Staff Mentorship Program

Overview

The School of Public Health Staff Mentorship Program aims to provide all staff with opportunities to thrive and succeed at BU SPH. The Program offers opportunities for staff to hone in on developmental priorities and to acquire additional skills, facilitating professional and personal growth.

Centrally, the program aims to promote the mentee's development in areas specific to both their role and personal goals as well as the mission and vision of SPH. This will ensure that all staff at BU SPH have opportunities to realize their full potential.

Mentors must have been at SPH for 5+ years and mentees for 1+ year. A letter of support from your supervisor is required as part of either application. Please also submit either a link to your LinkedIn profile or an updated resume.

Mentor Application I Mentee Application

Mentor and mentee information packets and review forms can be found on the Forms and Resources page.

The SPH Mentorship Program will accomplish the following:

- Develop productive working relationships between and among staff in departmental units so all staff are empowered to be successful as professionals and community members. This includes, among other things:
    - Attaining high performance while remaining adaptable;
    - Enhancing competency development;
    - Cultivating the right type of performance and conduct;
    - Inspiring, motivating, and guiding others;
    - Demonstrating honesty, integrity, trust, openness and respect.
- Elevate and encourage the perception that mentorship and service are to be valued as career development and lifelong learning experiences;
- Demonstrate commitment from leadership and management to establishing and maintaining learning and development programs for staff.
- Additionally, in order to achieve success, the Program will:
- Reflect the School's commitment to diversity, equity, inclusion and justice by including mentoring options that represent the SPH's demographics and diversity;
- Ensure management support, thereby increasing employee participation and program success;
- Establish and follow guidance and procedures aimed at ensuring effectiveness and efficiency in Program activities with the goal of organizational integration;
- Continue to serve the needs of the community by incorporating modifications based on program evaluation data collected during annual surveys of program participants.

Guidance and Objectives

The two key goals of this mission-driven, formal mentorship program are:

- To align mentoring as a lifelong learning tool;
- To ensure the benefits of the program are understood across the School of Public Health.

The "Think. Teach. Do" mission of the School of Public Health is best accomplished through a workforce equipped to utilize institutional knowledge toward specific leadership areas. Toward that goal, the Mentorship Program is aimed at fostering protégé development and knowledge transfer. Mentorship will accelerate the culture of high performance in all staff positions. Specifically, this mentorship program will also be aligned with:

- Onboarding – Support new hires and trainees in understanding SPH's values, vision, mission, and goals.
- Skills Enhancement – Allow for sharing of knowledge and expertise by pairing experienced and highly competent staff with newer, eager to learn mentees, allowing the former to pass on their expertise to those who seek to acquire additional, specialized skills.
- Organizational Development and adaptability to change – Help communicate SPH's values, vision, mission and organizational structure. Often, a one-on-one collegial relationship not only helps employees understand the organizational structure, but also encourages them to adapt and adjust accordingly, making changes toward business and career success.
- Professional Identity – As professionals closely collaborate together there is an ongoing dialogue of what it means to be a professional in the workplace. Staff who serve as mentors embody the values of their profession, take initiative and remain adaptable to organizational needs and change.
- Career Development – Help employees plan, develop, grow and manage their careers. Mentorship further helps employees become resilient in times of change, more self-reliant in their careers and responsible learners.
- Leadership and Management Development – Encourage ongoing development of leadership competencies which are more easily gained through guided application and practice rather than solely through education and training.
- Educational Support – Help bridge the gap between theory and practice. Formal on-the-job education and training are complemented by the knowledge and hands-on experience of a high-caliber practitioner.
- Staff retention – Through ongoing coaching, teaching, role-modeling and continuous positive collegial interactions facilitate progression and upward mobility within SPH. Enhance employee retention by helping establish an organizational culture that attracts top talent while nurturing opportunities for growth.
- Employee Engagement – Demonstrate to staff that they are highly valued at SPH and that the School's future includes them.
- Successful knowledge transfer – Allow for an exchange of information and knowledge between staff members of different units or the same unit in a cohesive and consistent manner.

Program Administration

The SPH Mentorship Program will be overseen by the Associate Dean for Administration and Finance who will partner with the Administrative Council and Staff Senate to implement the mentor/mentee partnerships and associated programmatic activity. Supervisors of mentors and mentees are involved and kept apprised of activities and progress of their team members who participate in this program.

ROLE	RESPONSIBILITY
Associate Dean for Administration and Finance (ADA)	• Authority for the SPH Mentorship Program. Oversee program's execution. • Assign program responsibility to members of the Admin Council and Staff Senate
Administrative Council & Staff Senate Mentorship Program Steering Committee	• Oversee development, implementation and evaluation of the SPH mentorship program. • Define the goals and objectives for the mentoring program that tie directly to the school's leadership.
Director of People Services who also serves as Program Coordinator for the Mentorship Program	• Train, coach, direct and mentor participants serving as mentors. • Review and make thorough and consistent evaluations of the participants' progress. • Provide support to guide and direct efforts of mentors and mentees to ensure successful program completion. • Facilitate planning and managing participants' assessments, tracking and scheduling activities, documentation of reporting requirements. • Continuously review and evaluate program assignments and activities throughout program cycles, ensuring instructions are cohesive, organized and tracked through relevant forms and checklists.

Roles, Responsibilities, and Benefits of a Mentoring Relationship

Participation in the mentorship program is aimed at fostering a collegial partnership between two employees (mentor and mentee) whereby both commit to the mentoring process. This involves jointly setting common goals and realistic expectations and exhibiting mutual trust and respect while focusing on accomplishing said goals. Further, activities that allow for the transfer of knowledge and skills from one employee to another/others occur in the framework of mentorship.

Professional growth during the mentorship process is an outcome for which both the mentor and mentee strive. While the mentee is able to gain valuable knowledge and skills from the mentor's expertise, thus strengthening competencies and learning from past mistakes, the mentor also enhances their own skills, fostering a valuable transfer of knowledge that establishes the mentor as a subject matter expert in one or more competency areas of their role.

In order to render this endeavor a success, it is key that roles and expectations during the mentoring process are clearly defined and that the participants are aware of, and eager to experience, the benefits of the program. As potential participants consider the benefits of mentorship, here are a few key points:

Benefits for the Mentor:

- Renews enthusiasm for the role of expert
- Obtains a greater understanding of the barriers experienced at lower levels of SPH
- Enhances skills in coaching, counseling, listening, and modeling conduct/high performance levels
- Develops and practices a more personal style of leadership
- Demonstrates expertise and shares knowledge
- Benefits for the Mentee:
- Gains sharper focus on what is needed to grow professionally
- Furthers development as a professional towards a lateral or higher position
- Gains capacity to translate values and strategies into productive actions
- Complements ongoing formal study and/or training and development activities
- Gains career development opportunities
- Gets assistance with ideas and receives honest feedback
- Demonstrates strengths and explores potential
- Increases career networks and receives greater agency exposure
- Improves ability to express expectations, goals, and concerns
- Enhances knowledge of organizational culture

It is thus important to consider eligibility in the mentorship program not solely from a perspective of eagerness to enhance existing skills, but also a potential participant’s fitness for the program. The success a mentee can achieve does depend on the mentee’s strengths, weaknesses, and career aspirations. But more important is their spirit of collaboration. The same is valid for the mentor. Responsibilities for each role are thus important and highlighted below.

Mentor Responsibilities:

- Regularly meet with mentee, jointly establishing and following through on activities.
- Share own experience and professional success at the SPH.
- Explain how the SPH is structured.
- Support SPH’s mission, vision, and goals.
- Look for experiences that will stretch the mentee (i.e., shadowing during meetings, triaging/handling/solving an issue, suggested readings, etc.).
- Remain accessible, committed, and engaged throughout the length of the program.
- Be a good listener.
- Provide open and candid feedback.
- Offer encouragement through genuine positive reinforcement.
- Be a positive role model.

- Share “lessons learned” from own experiences.
- Serve as a resource and a sounding board.
- Always maintain confidentiality.
- Advise the ADA as soon as possible if you are having a problem connecting with your mentee.

Mentee Responsibilities:

- Regularly meet with mentor, jointly establishing and following through on activities.
- Proactively reach out to your mentor and schedule meetings.
- Commit to self-development.
- Establish what skills and knowledge you’d like to improve or acquire.
- Work with mentor in establishing an individual development plan (IDP).
- Remain honest about goals, expectations, challenges, and concerns so mentorship is helpful.
- Come prepared for meetings with an agenda.
- Listen and ask questions, soliciting advice, opinion, feedback, and direction from the mentor.
- Be open and receptive to constructive criticism/feedback.
- Preserve confidentiality of your conversations.
- Exhibit respect for the mentor’s time and resources.
- Remain accessible, committed, and engaged throughout the length of the program.
- Provide candid feedback to the mentor on what is working or what isn’t.
- Advise the ADA as soon as possible if you are having a problem with your mentor.
- It is highly recommended that both mentor and mentee dedicate a minimum of five hours a month during the 9 month academic year toward mentorship program activities so as to maximize the outcome of this experience. This will help to ensure that both participants derive value from the time they dedicate to this endeavor.

3. Professional Development and Training

The Professional Development and Training Sub-committee

Charge
The Professional Development and Training Sub-committee identifies needs and develops programs for personal and professional development of BUSPH Staff in order to: improve performance, aid in mentorship, support career advancement, and increase job satisfaction and retention. This subcommittee works in conjunction with other senate subcommittees in order to plan and execute events and programs related to staff development and training.

Responsibilities
To carry out this charge the Staff Survey Subcommittee will:

1. Work with the staff survey subcommittee to identify staff development opportunities and create programs to address these gaps
2. Collaborate with existing BUSPH platforms promoting and creating development opportunities for staff
3. Plan and promote lunch and learns for BUSPH faculty and staff

Time Commitment
The Professional Development and Training Subcommittee meets minimally once a month. This group may be required to convene more frequently to plan, monitor and finalize professional development and training events or programs. Any staff at BUPSH are welcome to join at any time, including non-senate members. If you are interested in joining the Professional Development and Training Subcommittee, please email staffsen@bu.edu.

Professional Development Workshops

Professional Development workshops are designed to provide staff with an opportunity to enhance their professional skills. These workshops offer tools and experiences staff can leverage to enhance their careers, enhancing their performance and overall effectiveness. These workshops are open to all BUSPH staff interested in furthering their careers.

Managers are encouraged to leverage these professional development workshops as they think about their unit's training and skill development needs, as well as on an individual staff development basis, especially during performance review periods.

4. Professional Development Scholarship

SPH staff members are encouraged to identify professional development opportunities that may be of interest to them and directly related to their job roles at SPH, subsequently discussing these opportunities with their immediate supervisor or manager. If these opportunities are not readily available at SPH or Boston University, staff members may apply for a professional development scholarship and request up to $1,000 in financial support towards a professional development opportunity.

To be considered, professional development opportunities must meet all minimum criteria as follows:

- Directly relevant to staff members' ability to perform tasks inherent to their current position
- Directly related to increasing staff members' knowledge, skills, or abilities in subject matter or technical areas relevant to the work performed directly by them or more broadly by their unit, team or department
- Directly related to and consistent with our organizational mission and values

Request approvals are based on the criteria listed above and remain subject to the availability of funding. If you have questions on whether a course, training, conference or developmental experience qualifies under the criteria above, please contact the Associate Dean of Administration for assistance.

Staff should apply for the Professional Development Scholarship through the online version of the Staff Handbook.

5. Lunch and Learn Series

Lunch and Learn workshops are a great way to develop and motivate employees while creating a fun, collaborative, learning workplace aimed at personal and professional growth. These workshops typically are one hour in length and span a variety of topics.

Workshops are updated regularly; details are available in the web version of this handbook.

6. Technology Learning

Technology Learning workshops help individuals strengthen their knowledge in technology basics and online applications that are regularly part of day-to-day work. These workshops are available to all faculty and staff through a variety of formats that allow learning at your own pace, on your own time.

Instructor-led trainings

Beyond the learning you can do independently using the Process Guides and Document Library, BU offers several instructor-led workshops. These workshops are designed to help employees build skills in technology fundamentals.

- BUWorks Trainings. These Instructor-led trainings are available for employees who work in the Finance, Human Capital Management (HR), Procurement and Business Warehouse areas of BUworks. The training path grid enables an employee to determine what training is recommended based on their business role. There are also process guides and document library to supplement learning.
- Blackboard. This course focuses on the basic tasks for setting up a Blackboard Learn course site. This gives an overview of the system and shows how to create content folders, upload documents, create links, and add students to courses.
- Excel. In response to the growing demand for Microsoft Office training, BU now offers day-long training sessions on Excel at three different levels – Introductory, Intermediate, and Advanced.
- Qualtrics. Learn to create, edit, distribute, and view survey results.
- NVivo. NVivo is a powerful tool for social scientists and humanists to analyze large or complex sets of qualitative data. This is a hands-on introductory workshop covering the basics of NVivo, including the interface, ways of coding data, and using queries to analyst data.
- WordPress. This is an introductory course on WordPress, overviewing the specifics of BU's WordPress installation. This course covers how to navigate the editing and site-management tools, including adding imagines and links, work with custom plugins, and Add A Link.
- Research Computing Services. The Research Computing Services group offers a series of tutorials on programming, high-performance computing, and scientific visualization. These tutorials cover concepts, techniques, and tools.

Online Trainings with Terrier eDevelopment

Terrier eDevelopment is an e-learning platform available to BU faculty and staff, offering instant access to business skills and IT content from Management to Mindfulness, from critical thinking to collaboration, and Adobe to excel. Learning options include online courses, books, executive summaries, and videos. This is available on-demand, and previous learning history is saved for later reference.

7. Degree Program Enrollment

Tuition remission is an important benefit extended for Boston University employees, and the School of Public Health encourages all staff and faculty to make the most of this benefit.

Employees who are also students must be cognizant of the balance between work responsibilities and student responsibilities. In general, staff are encouraged to take classes outside of business hours. When a course is scheduled for during business hours, staff must secure prior approval from their department chair and supervisor. The University reserves the right to refuse classes taken using Tuition Remission if they conflict with the needs of the department. Staff must report all courses taken, not only courses covered by the Tuition Remission Program, to determine if there is a conflict with the needs of their department.

Staff are not paid for attending a class during scheduled work hours.

Staff enrolled in more than eight credits in one semester must complete the credit exemption form in Employee Self-Service. This form must be approved by the staff member's supervisor and Associate Dean for Administration and Finance.

8. Health and Wellness

To promote BU's culture of wellness, the school provides opportunities to support staff in taking care of one's mental, physical, and emotional well-being. This includes a dedicated staff person whose position it is to promote wellbeing throughout BUSPH to the staff, faculty, and students.

BUSPH wellness offerings change weekly and range from yoga classes, meditations, and progressive muscle relaxation workshops to essential oil workshops and intuitive eating – open to all. The Assistant Director for Engagement holds regular office hours to discuss self-care strategies and is available as a resource for finding the support necessary.

BUSPH community members have access to an Employee Assistance Program (EAP) through Corporate Counseling Associates (CCA@YourService). This EAP is offered at no cost to benefit-eligible colleagues. CCA@YourService is an individualized resource for providing confidential, practical, around-the-clock information and assistance ranging from mental health, emotional health, and wellness support to work-life services like childcare, eldercare, financial or legal help, certified life coaching, and behavioral change tools through various pathways of care—in person, telehealth, phone, chat, and self-directed digital platforms. CCA@YourService can even help with personalized consumer resources and referrals like pet care, home improvement, budgeting, and travel.

Please note that Corporate Counseling Associates benefits are confidential; names and other identifying information are not reported back to the University or SPH.

You can access CCA@YourService by phone, online, or via their app as follows:
24/7 toll-free helpline: 800-833-8707
Website: www.myccaonline.com
App: CCA@YourService

CCA@YourService requires users to provide a company code and access code; these codes may be obtained from your department or unit director.
The University provides employees of Boston University with free and confidential access to the Faculty Staff Assistance Office (FSAO). The FSAO offers employees and their families counseling, resources, and referrals for a variety of work-related and personal issues.

Through the University, all staff and faculty receive emails from wellness@bu.edu about current health and wellness offerings. Staff may register online, learn more about each workshop, and explore additional resources by visiting the Employee Wellness homepage.

Workshops and events include:
- Cooking Demonstrations
- Mindfulness and Resilience
- Stretch & Breathe
- Good Grief

- Nutrition By Design

VI. Hiring and Managing a Team

The School of Public Health supports all staff and managers through an array of human resources services provided through the Associate Dean of Administration. Staff and faculty should contact the Associate Dean for Administration with any questions.

1. Search and Hiring Process

Hiring the right people for the right position is the most important part of the hiring process. A well-structured recruitment and selection process is critical to hiring top talent, both effectively and efficiently. The Associate Dean for Administration works with hiring managers to develop a recruitment strategy that outlines recruitment needs and goals, establish an interview process, identify members of the interview panel, and create behavioral interview questions specific to the position.

There are four key elements to a successful hiring process:
- Accurate position classification
- Effective recruitment strategy
- Making a competitive offer
- Successful onboarding

Position Classification

There are several staff categories at Boston University: regular or temporary. Regular staff are categorized as exempt or non-exempt. The majority of SPH staff are regular employees.

All SPH employees are "at-will," meaning that either the employee or the employer may terminate the employment relationship at any time for any lawful reason. There is no probationary period for new staff.

Regular Employees

Regular employees* are those who are not covered by a collective bargaining agreement and who are not members of the faculty. Policy statements only cover regular, full- and part-time employees (those with assignment durations of nine months or more), including exempt administrative staff, exempt research staff, non-exempt administrative support staff, non-exempt research support staff, teachers, and non-faculty instructors.

Exempt Staff. An exempt employee is exempt from the overtime provisions of the Fair Labor Standards Act (FLSA). Such an employee must receive at no less than $455 per week on a salary basis. Being paid on a "salary basis" means an employee regularly receives a predetermined amount of compensation each pay period on a weekly, or less frequent, basis. The predetermined amount cannot reduce because of variations in the quality or quantity of the employee's work. Subject to FLSA exceptions, an exempt employee must receive the full salary for any workweek the employee performs any work, regardless of the number of days or hours worked. Exempt employees are not subject to the overtime provisions of the Fair Labor Standards Act. Exempt employees are not entitled to overtime pay. For additional details, see the Boston University Employee Handbook, Section 201.6.

Non-Exempt Staff. Compensation for a non-exempt employee for hours worked is as per the provisions of the Fair Labor Standards Act (FLSA). Employees are paid their regular hourly rate for all hours worked up to and including forty (40) hours during the workweek. Employees receive one-and-one-half (1-1/2) times their regular hourly rate for all hours worked over forty (40) hours during the workweek. For computing overtime payment, if an employee does not work on the day of an observed holiday and receives payment for that day, their scheduled hours of work are counted as hours worked. Paid Vacation, Sick, Personal Days, and Intersession Days not worked are not counted as hours worked for computing overtime. As a condition of employment, employees are expected to work overtime as required by the operational needs of the School of Public Health. Overtime must be approved in advance by the employee's supervisor. Supervisors are required by law to maintain complete and accurate records of the hours worked each day by the non-exempt employees they supervise. They are also responsible for ensuring that employees are properly compensated for all hours worked, including any overtime. Supervisors must also maintain accurate attendance records for the exempt employees they supervise.

**Note:* Human Resources only is authorized to issue an offer letter to regular employees paid from unrestricted funds or regular employees with the title of "Research Assistant."

Temporary Employees

The School of Public Health may hire temporary personnel* to fill a specific need or for a particular short-term project, including:

- Additional/temporary help needed during peak departmental periods
- Special projects or events with clearly defined beginning and end dates
- Temporarily filling in for an "open" staff position
- Temporarily filling in for an employee who is on a short-term leave (less than nine months)

All temporary employee positions must be approved by the Associate Dean for Administration before being posted.

There are three types of temporary personnel:

- Temporary Employees (formerly referred to as "casual employees") are individuals hired directly by the department and paid through Boston University payroll for a maximum of 8.8 consecutive months. The department determines the Temporary Employee's pay rate and duration of employment (not to exceed 8.8 consecutive months).

- Temporary Agency Personnel are individuals hired through an outside employment agency and are considered employees of that agency. TerrierTemps, BU's Contingent Workforce Management (CWM) program, provides a single source for finding, screening, selecting, and paying for these employees. Temporary Agency Personnel are not paid through the Boston University payroll system; they are paid through their employment agency.

- Independent Contractors are individuals, sole proprietors (including single-member LLCs), partnerships, corporations, etc., that render services to the general public. Independent Contractors are responsible for the means and methods of completing a task based on the specifications of a contract with SPH. Contractors generally have multiple clients and are not supervised by University employees. For more information on engaging Independent Contractors, please visit the Sourcing & Procurement website.

**Note:* It is important to highlight that no offer letters are issued to temporary employees, which is a delineating factor from appointment letters issued to regular full time or regular term positions for research roles.

Job Families

A job family organizes a series of related jobs involving similar types of work with a progressively higher level of skill, competence, responsibility, impact, knowledge, and expertise. A job family model identifies the number of levels within a particular job family, clearly differentiates one level from the next, and describes the work at each level.

Jobs in a job family may be in the same or different departments with the School of Public of Health, and some job families may have more jobs and job levels in them than others. Organizing jobs into job families support salary benchmarking, career progression, and performance management.

Key Steps To Hiring Process

Hiring managers should work with the Associate Dean for Administration and follow the steps below:

1. Discuss need for a new position/backfill for an existing position/augmenting or changing an existing position.
2. Complete the SPH Position Request/Staff Justification form after reviewing the guidelines provided therein.
3. Complete a Provost Exemption Request form – this applies only if the request is for a new, centrally funded position resulting in an FTE.
4. Upon approval by the Associate Dean for Administration and receipt of the signed Provost Exemption form, submit an online position evaluation request to HR Compensation for new positions/altered positions (where either title or core duties are changed as compared to previous SAP record).
5. Pursuant to HR Comp guidelines, process a "create or maintain position" in SAP. If you need assistance with such SAP transactions, please reach out to the Director of People Services.
6. Once position is posted, hiring managers screen resumes received to ensure adherence to position criteria as posted and set up panel interviews for selected candidates.

7. Set up an interview matrix of relevant questions (based on position description) for interviewing panel to pose to candidates selected for interviews.
8. Rate each candidate based on guidelines highlighted in the interview matrix.
9. Run reference checks in SkillSurvey for up to three finalists. Review and consider reference checks received prior to finalizing decision to extend an offer to the finalist.
   Please note that internal SPH and BU candidates are not required to undergo a SkillSurvey reference check. However, it is mandatory that a written recommendation (this may be in the form of an email) from their current supervisor be submitted to their future supervisor prior to HR extending an offer.
10. Discuss salary considerations/potential offer/reference checks with Associate Dean for Administration and Finance. Upon concurrence, fill out the offer form online and route to the appropriate Talent Acquisition Specialist assigned to SPH. Upon receipt of the HR email containing Google form offer info confirmation, route the latter via email to Talent Acquisition Specialist, alongside SkillSurvey reference feedback and completed Applicant Flow Log Template.
11. Once HR confirms candidate has accepted the offer and start date, reach out to candidate to congratulate them and prepare to follow onboarding checklist.
12. Advise the Director of People Services via email of the name, contact info and start date of the new employee.

Tips for a well written position description can be found on the HR Compensation site.

Selecting and Interviewing Candidates

Open SPH staff positions are assigned to a Talent Acquisition Specialist in Human Resources. The Talent Acquisition Specialist will provide hiring managers with access to submitted candidate materials in SilkRoad Recruiting. Prior to each position being posted, the Talent Acquisition Specialist meets with the respective supervisor to establish service level parameters. Subsequently, upon receipt of resumes, hiring managers identify 4 -5 candidates to advance to in-person interviews.

Interviews are coordinated by each hiring manager and follow a defined process:

- The hiring manager coordinates the formation of a Selection Panel in collaboration with the Associate Dean for Administration. The panel consists of at least three faculty and/or staff who serve as voting members and the Associate Dean for Administration who serves as a non-voting member.
- The hiring manager coordinates in-person interviews, scheduling all candidates for 60 minutes over the course of one day. Candidates meet with the selection panel for 45 minutes; the panel uses the remaining 15 minutes to deliberate and summarize feedback about each candidate.
- Candidate interviews are facilitated by the respective hiring manager, providing the Selection Panel with a rating matrix and interview questions based on key aspects of the job description. Each candidate is rated by the Selection Panel individually, and the panel as a whole makes a single final rating of (1) finalist, (2) first alternate finalist, (3) second alternate finalist, or (4) not selected.

Background Checks. SPH strives to ensure a safe, productive, and inclusive work environment. To that end, before employment with SPH, all candidates being considered for employment in certain designated positions within SPH and the University must authorize background checks, which include, but are not limited to: a criminal history records check; Sexual Offender Registry Information (SORI) check; and verification of academic credentials, as well as the applicant's social security number. A Massachusetts Criminal Offender Record Information (CORI) check, credit history, verification of professional license, certification, driver's license record, healthcare fraud, professional references, and fingerprinting may also be required or apply for certain positions. The applicant must supply accurate information regarding their current and former places of residence. The applicant is entitled to see the results of all background checks and able to correct any inaccurate information contained therein. All information is for employment purposes only and kept in strict confidence by the Human Resources Office. If there is a need-to-know, Human Resources may share this information with the hiring manager.

Immigration. SPH remains in compliance with the Immigration Reform and Control Act (IRCA). Therefore all SPH new hires (employees hired after November 6, 1986) are required to produce proof of their identity and employment eligibility to their hiring managers as a condition of employment; this includes all full- and part-time, regular employees, casual, and temporary employees. All new employees must complete the Employment Eligibility Verification Form (I-9 Form) within three working days of the first day of work. The School of Public Health's employment of foreign nationals is restricted to those who are authorized under law to accept employment in the United States. As part of the employment process, all employees, including foreign nationals, are required to complete the federal United States Citizen and Immigration Service Form I-9 (Employment Eligibility Verification Form). This form must be completed at the International Student and Scholars Office (ISSO) no later than the end of the third day of employment. Whenever employees who are on OPT/other type of visa are engaged into a position at SPH, ISSO must be notified as soon as possible. All I-9 verification for such employees is done through ISSO, rather than HR which is the standard route for US citizens/Permanent residents of the US.

Employment of Relatives. SPH employees may refer friends and relatives to Human Resources for possible employment by SPH. Such referrals are processed per the procedures applicable to all applicants. Relatives who are qualified for employment at SPH and the University cannot be employed in positions where a relative or member of the same household has supervisory responsibility for the other or makes employment decisions on the other. Close relatives include the employee's spouse, parents, parents-in-law, grandparents, brothers, sisters, brothers- or sisters-in-law, sons- or daughters-in-law, uncles, aunts, nieces, nephews, children, or grandchildren.

If two employees become close relatives by marriage and one has supervisory responsibility for the other or makes employment decisions about the other, one of the individuals will be required to effectuate a transfer or termination within ninety (90) days of the marriage. In compliance with Boston University's policies, before extending an employment offer, requests for exceptions must be approved by the Provost or the appropriate Vice President and submitted with written justification to the Chief Human Resources Officer.

An offer of full-time employment to a member of the immediate family of a trustee or officer or other selected employee or other representative is subject to prior review and approval by the President of the University.

Making a Job Offer

It is the goal of SPH to attract and recruit talented individuals who are motivated and mission-driven. We strive to provide fair, equitable, and competitive compensation.

Offers of employment can only be made by Human Resources and are contingent upon successful completion of a background check, past employment verification, and academic credential verification. Offers of employment can only be made after the position has been posted for five business days, all required interviews have been conducted, and reference checks are completed.

All offer letters related to academic job family positions must be reviewed, approved, and signed centrally. This includes faculty positions, visiting researchers, visiting fellows, research fellows, postdoctoral fellows, postdoctoral associates, research scientists, research engineers, and academic researchers (including positions at senior ranks). Offer letters for primary faculty positions require approval by the Dean directly. However, offer letters related to all others may be approved by the Associate Dean for Research and Faculty Advancement as the Dean's designee. Absent such approval and signature, offer letters shall be considered invalid. Additionally, any documentation necessitating ISSO processing and inherently Dean signature approval must also be routed to the Associate Dean for Research and Faculty Advancement as the Dean's designee.

Hiring managers should work with the Talent Acquisition Specialist assigned to SPH to complete the Offer Detail Form, Applicant Flow Log, and Reference Check Form.

Once an offer of employment has been accepted, the Talent Acquisition Specialist works with the finalist on the hiring paperwork, including an employment application, Conflict of Interest form, Disclosure and Acknowledgement for background checks, and a Release and Authorization for background checks.

Salary Equity. SPH is committed to salary equity among our employees, both to adhere to legal requirements and good management practices. Salary equity increases efficiency and productivity, helping attract the best candidates, reduce staff turnover, increase commitment, and reduce absenteeism. SPH works closely with HR Compensation to ensure that salary equity is addressed throughout SPH and the University as a whole.

2. Onboarding a New Employee

Welcoming new members of the SPH community is one of the most exciting activities we do at the School of Public Health. The onboarding process is designed to provide a consistent experience where new hires feel welcomed, valued, and set for success. Successful onboarding allows an individual to quickly become engaged, assimilated, and impactful, both in their role and across SPH.

New Employee Orientation, Email, and Account Set-Up

All new regular full- and part-time employees working at least 75 percent time are required to attend New Employee Orientation, a training workshop hosted by the Human Resources Office each Monday morning. The New Employee Orientation provides an overview of benefits and employee policies and orients new staff to the university. Each hiring manager works collaboratively with the Talent Acquisition Specialist assigned to SPH to schedule new staff for New Employee Orientation.

Human Resources uses Red Carpet, a streamlined onboarding system, to grant BU email, employee self-service, wireless, and VPN access. Employees automatically receive their account creation invitation to their personal email account once they are officially hired into BU. Managers will receive email notifications of account setup reminders, successful setups, and I-9 reminders.

For general onboarding resources, please review the Human Resources New Employees page.

SPH Onboarding

In addition to the New Employee Orientation led by HR, SPH Administration organizes a meet and greet orientation for new staff, where expectations and resources are shared, in addition to a full introduction to SPH. Participation is mandatory and the onboarding presentation may be accessed here: [add link to presentation ppt].

Department/Unit Onboarding

Onboarding new employees begins before their first day. Hiring managers should work with the administrative lead in their department/unit and the Director of Facilities and Building Operations to:

- Identify and prepare workspace and phone line
- Arrange for a computer and any other necessary equipment. Existing resources should be used whenever possible. If new equipment is needed, administrative leads should follow the asset request process in Section XI.1. Asset Management.
- Secure keys, name badges, office name tag, and any other physical assets needed

On the staff member's first day:

- Hiring managers should send a welcome email to the department, briefly introducing the new staff member, giving a brief description of their previous experience, highlights from their career, and indicating any other key team members with whom they will be working.
- New staff should meet with the administrative lead of the unit and discuss:
    - school and departmental functions and organizational structure
    - services the department provide to staff, faculty, students, parents, visitors, and the public
    - community events, including Public Health Conversations and monthly staff breakfasts
    - the Staff and Operations Handbook
    - work schedules, proper time entry/hours worked in BUWorks and procedure for reporting sick and vacation time

    - University Information Security and Business Continuity policies and procedures (safe computing, virus protection, security tools, phishing, etc.).
    - environmental health and safety training
    - the physical layout of the unit, building and immediate vicinity, and all other relevant work areas alongside a walk-through of the premises
    - safety and emergency procedures, including Campus Public Safety Tips and RUN. HIDE. FIGHT video
- The administrative lead of the unit should also connect the new staff member with SPH Marketing and Communications so they can get a headshot and develop their staff directory listing.
- New staff should also meet with the hiring manager and discuss:
    - a comprehensive job description, highlighting the new employee's job duties and responsibilities, clearly delineating expectations, deliverables, and timetable where applicable
    - overview of performance review planning
    - applicable protocol for individual research studies
    - system accesses
- To introduce the new staff member to the SPH community, when possible, the hiring manager and administrative lead should facilitate a meeting with new colleagues from across the unit.

3. Managing and Leading a Team

Managing people is about encouraging them to do their best work. It's about being a good listener, an effective communicator, providing structure, and promoting learning and a healthy exchange of ideas. Managers' success is measured not merely by individual contributions, but by effectively managing others. Managers train, mentor, inspire, lead, and motivate the team towards accomplishing the goals of the unit and organization as a whole.

Effective leaders need more than a good attitude; good management skills are also necessary. Effective leaders are not just expected to react and respond, but rather to take the initiative and generate action, ensuring the job gets done. Great leaders can inspire confidence in others.

Delegating

Delegation is a way to appropriately and consistently provide direction to staff. By delegating properly, managers enable employees to gain new skills and expertise to become more productive and self-confident, improving morale and motivation. Managers must assess the staff's abilities and their potential to take on delegated assignments. Managers must be able to plan and coordinate properly and have the ability to monitor progress. Delegation relies heavily on a combination of management skills, including organization and planning, coordination, communication, motivation, and leading.

Communication and Feedback

Managers drive performance and hold employees accountable by helping them understand what is expected of them while gaining commitment to achieving those goals. When effective managers set goals and expectations, employees feel motivated to perform well because they can directly see how their efforts make a difference.

Performance Management

As detailed in Section IV, performance management is a year-round process, which results in an annual performance evaluation. Supervisors meet with their employees regularly throughout the year to review specific accomplishments, establish goals and objectives, and adjust goals based on workload or other changes in priorities.

There are three key components to performance management:

- Performance Planning – Establish goals and objectives
- Performance Coaching – Provide regular feedback on performance throughout the year, and assist staff in modifying performance where necessary
- Performance Evaluation – End-of-year formal documented performance review

Staff Awards and Recognition

As detailed in Section V.1, there are a number of ways to recognize staff for their contributions to the School. Managers are encouraged to recognize outstanding service throughout the year.

Promotions

A promotion recognizes an employee's exemplary and sustained contributions to their role. Promotions may be appropriate when an employee advances to a position that has significantly changed in content and requires a higher level of responsibility and when the employee demonstrates the competency, skill, and knowledge needed to move up to the next level in their career path or job family. A salary increase is typically appropriate at the time of promotion, based upon an evaluation of relevant experience, performance, internal equity, and external competitiveness.

All promotions must be approved by the Associate Dean for Administration. When requesting a promotion, hiring managers must:

- Reach out to the Associate Dean for Administration and Finance to set up a meeting to discuss the potential promotion.
- Clearly define any new essential functions and a higher level of responsibility providing an updated job description and/or title.
- Upon concurrence by the Associate Dean for Administration and Finance, submit a position evaluation request through HR Compensation.
- Upon receipt of position grading/relevant compensation, effectuate the transaction in SAP and once all approvals are finalized in SAP, generate a promotion letter to the impacted staff member. (For available samples please reach out to the Director of People Services.)

Please note that HR Compensation takes roughly two weeks to review the information submitted and make appropriate recommendations. Should you experience any delays beyond this time frame, please reach out to the Associate Dean for Finance and Administration.

Corrective Action

Corrective Action is a response by the employer to problems with employee performance or conduct. It may come in the form of a verbal or written reprimand or the loss of employee privileges. The purpose of corrective action is to turn around poor performance, lack of dependability, and poor conduct by continuing to identify problems, causes, and solutions.

The Associate Dean for Administration is available to assist managers in any instances where corrective action may be appropriate, liaising as appropriate with the University's HR business partner.

All corrective actions must be kept confidential by the manager, the Associate Dean for Administration, and any other parties involved.

In carrying out corrective action:

- Make sure corrective action is the appropriate tool. Would coaching or performance appraisal be sufficient to get the employee's attention?
- Make a careful assessment of the problem to determine whether corrective action is appropriate
- Provide specific examples of performance discrepancies or SPH policy violations, so the employee fully understands what needs correction
- Allow the employee ample opportunity to explain so that you have all the facts

- When taking corrective action, ensure it is commensurate with the violation
- Help the employee improve performance by providing specific recommendations and requirements, leading to measurable results
- Communicate clearly, so the employee understands the consequences of failure to improve performance or conduct

As a general rule, the corrective action should be just enough to get the employee's attention. If there is no improvement or if repeat occurrences follow, the manager should consult the Associate Dean for Administration to determine if progressively more severe actions are appropriate.

Step 1: Verbal Counseling(s) Verbal counseling is generally the first step of corrective action. It is intended as a way for the manager/supervisor to notify an employee that their performance or conduct needs improvement.

The manager should meet privately with the employee to discuss the issue and determine if the employee was aware of the issue. The employee should be given ample time to explain their role and actions. Managers should guide the employee to use any available resources to resolve the issue.

The manager should maintain written documentation regarding the issue, the date on which the issue occurred, and the corrective action requested. This documentation should be emailed to the employee following the verbal conversation as confirmation of the discussion and any ensuing agreements.

In many cases, a verbal warning is sufficient for correcting an action.

Step 2: Written Warning(s) A written warning is generally the second step of progressive correction. A written warning provides notice to an employee regarding continued work performance issues or inappropriate workplace behavior that remain unresolved, despite the employee receiving verbal counseling.

The written warning should include information regarding the specific issue, the date on which the issue occurred, and the performance or behavior expected from the employee. Managers should work with the Human Resources Business Partner toward developing a written warning, including the Associate Dean for Administration, throughout such communications.

The manager should meet privately with the employee to discuss the issue and to provide a written warning to the employee. As appropriate, the manager should guide the employee to use available resources that may assist them in resolving the issue. The employee may also be referred to the Faculty/Staff Assistance Office or the Office of the Ombuds.

At the conclusion of the meeting, the employee should be asked to sign the written warning, indicating that they have read and understood the warning. The manager should explain to the employee that their signature does not constitute their agreement to the facts outlined in the warning letter, but rather their acknowledgment that the warning letter was discussed and presented to the employee on the referenced date. If the employee refuses to sign the written warning, the manager should indicate so on the written warning letter, appropriately dating and initialing. The written warning should be placed in the employee's Personnel File, providing a copy to the employee via email with a carbon copy to the Human Resources Business Partner and the Associate Dean for Administration.

Step 3: Final Written Warning. The Final Written warning should be carried out in close consultation with Human Resources and the Associate Dean for Administration. The final warning letter should identify the issue in the employee's performance, conduct or combination thereof, support the articulated gravity of such issue and clearly outline the resulting action to be undertaken by SPH Administration and University Human Resources.

4. Staff Departures and Offboarding

Managers and unit administrative leads play a key role in helping staff depart from SPH. Managers should immediately notify via email Human Resources, the Associate Dean for Administration, the Director of People Services, and the Director of Facilities and Building Operations when an employee resigns by submitting a resignation letter to their manager. Administrative leads then process the employee termination in SAP.

Each departing employee is strongly encouraged to participate in an exit interview with the Associate Dean for Administration. These interviews help the school to better understand the reasons for an employee leaving and incorporate any input the departing employees may have on how to maximize employee satisfaction on the job.

Departing employees are required to:

- Provide their manager with a letter of resignation that includes the date of their last day;
- Contact Human Resources to understand how the departure will impact benefits and learn about applicable policies and rights;
- Confirm that all used vacation and sick time has been entered into Employee Self-Service;
- Reconcile all Travel Card and PCard expenses;
- Return all university property, including computers, BUID cards, travel cards, pcards, and keys; and
- Settle all outstanding accounts.

Together with administrative leads, managers are required to:

- Confirm vacation balances are up to date. Exempt employees are automatically paid out accrued vacation time as of their last day of employment on the next scheduled pay period (unless the termination is processed after the monthly payroll deadline). Non-exempt employees' vacation balances must be processed by the administrative lead after the termination has been processed in SAP;
- Email Gretchen Hartigan at hartigan@bu.edu with the departing employee's name, BUID, and last day worked to ensure any grant is credited back the vacation payout expense;
- Confirm all Travel Card and pcard expenses have been reconciled. Collect the card before the employee's last day worked and return all cards to the Director of Facilities and Building Operations;
- Collect all BU property, including computers, ID cards, and keys; and

Complete the Exit Checklist and email the completed form to the Associate Dean for Administration on or before the employee's last day of work.

VII. Vendor Engagement, Purchasing Supplies, Travel, and Reimbursements

1. Vendor Engagement and Contract Review Process

The Boston University School of Public Health is dedicated to maximizing strategic use of operating budgets through careful consideration and planning when engaging vendors (as well as contractors, consultants, and other non-employees) in purchasing their products and services. A "vendor" is defined as a person or business entity that engages in the sale or procurement of goods and/or services. A vendor is NOT a BU employee.

To that end, streamlining engagement and utilization of vendors to identify savings opportunities is a best practice at BUSPH. In exercising good stewardship of our financial resources, all departmental directors of administration or unit leads/managers work regularly with SPH Central Administration toward review and approval of all contracts (excluding Sponsored Programs agreements) with both new and existing vendors. Please do NOT engage in charging P-cards when attempting to hire a vendor, unless you have already discussed with your department's director of administration and/or Associate Dean for Administration and received express approval in writing.

Following submission of a proposed contractual agreement, all departmental directors of administration or unit leads/managers should submit all contract proposals equal to or exceeding $10,000 via email to the BUSPH Associate Dean for Administration and Finance with a cc to the Department Chair/Unit Head and Director of Finance. Upon careful analysis and reconciliation of records of vendors previously engaged, as well as any other applicable non-employees (e.g. contractors, consultants, etc.), the BUSPH Finance and Administration will work collaboratively with the department initiating the request to identify additional cost efficiencies in a manner that achieves the best overall value for the Department and the School. Subsequently, Procurement and OGC personnel will be engaged in accordance with Sourcing and Procurement policies. Any questions regarding this process may be directed to the Associate Dean for Administration and Finance or the Director of Finance at BUSPH. The contract review process is delineated below.

Contract Review Process

2. Purchasing Supplies

Each School of Public Health unit has purchasing needs and typically designates one member of the staff to coordinate these efforts. This staff member should be well-versed in when to use Ariba Guided BUying, Travel Card, or PCard, processes which are detailed in the Finance section of this handbook.

Faculty and staff wishing to make purchases should contact their unit administrative lead.

Please note that personal purchases made on Amazon are not reimbursable. The administrative lead in the unit can facilitate approved Amazon purchases through Ariba.

3. Travel

Travel on University business, and for research, education, and public service activities is a valuable and necessary activity for many of the University's faculty, staff, and students as well as for official business visitors. Expenses incurred for business travel and other business expenses are reimbursable when properly documented, approved, and in compliance with University policy and IRS and sponsor regulations.

Travelers should feel secure and comfortable when traveling and should neither gain nor lose personal funds as a result of business travel on the University's behalf. Only reasonable, necessary, and appropriate travel and business expenses will be funded by the University; expenses of a personal nature are unallowable and are the employee's obligation.

Faculty and staff traveling and/or making arrangements for the travel of others should be aware of available University resources for ensuring the safety and protection of all travelers and follow all related requirements as detailed in this document and the associated policies section.

All faculty and staff are required to use the University Travel Card when using University funds to make travel arrangements and when incurring travel and business-related expenses during a trip. Travel that will be funded by external sources or discretionary funds does not require prior approval. However, those seeking school reimbursement from central funds, must complete a Travel Authorization Form and seek prior approval from their supervisor/department administration or chair and Associate Dean for Administration and Finance, prior to engaging in any travel. Hotel as well as meals and incidental expenses funded by central funds will be reimbursed at the GSA per diem rates as applicable for the relevant fiscal year and geolocation of intended travel.

In the conduct of University business, faculty and staff should maintain the highest ethical standards and should keep in mind their responsibilities as responsible stewards of University funds.

When possible, faculty and staff should use BU Preferred Vendors for their travel.

a. Definition

The Fair Labor Standards Act (FLSA) regulations require employers to pay for travel time in some circumstances. Generally, time spent traveling is compensable, unless it is normal home-to-work commute time, or when travel requires an overnight stay and the time spent traveling as a passenger falls outside of the employee's normal work hours.

When pay is required, the time spent traveling is considered hours worked and must be included when determining overtime pay obligations. For reference, here's a table delineating compensable vs. not-compensable time:

Type of Travel	Compensable	Not Compensable

Home-to-work commute		X
Travel to different worksites during the workday	X	
Travel to a different city, returning the same day	X	
Travel that requires an overnight stay		
During regular work hours	X	
Outside of regular work hours		X
Driving that is required by the employer	X	

Home-to-work travel. Normal commuting time to an employee's regular worksite is not treated as hours worked under the FLSA and therefore any expenses related to an employee's normal commute from-to-work are not compensable/reimbursable unless there is a contractual agreement in place that provides compensation for said expenses.

b. Concur

Concur is the University's travel management system. It allows for easy online bookings for travel, increased visibility into expenses, and quick reimbursement turnarounds for out of pocket expenditures.

Concur may be accessed via the "Travel Reimbursements" section of Employee Self-Service.

Expense Reports. All trips and reimbursements must be detailed in an Expense Report. Typically, these are completed by the traveler, though travelers may select a designee to complete Expense Reports. Expense Reports should be filed within 30 days of the trip.

Detailed instructions for how to file an expense report, including how to itemize an expense and confirm that the trip is being charged to the correct General Ledger account and Fund Center, are available on the Travel Services website.

Expense reports in Concur require three approval steps:
- The cardholder's direct manager/supervisor level
- Cost object approver
- Accounting review (which is done by the Travel Office)

Once an expense report is submitted, it will appear in the Active Reports section of the Expense tab in the Report Owner's Concur Profile. The report will also list the approval step. For example:
- If with Supervisor - "Submitted & Pending Approval ____" (displaying supervisor's name)
- If with Cost Object Approver - "Pending Cost Object Approval"

Cost object approvers, typically the traveler's supervisor or the administrative lead in the unit, should be familiar with how to how to approve expense reports. An important step in the approval process is to confirm that the correct General Ledger account and Fund Center are being charged.

Helpful Links

Concur- FAQs
Boston University Travel Services
Travel Quick Start Guide
How to Start an Expense Report
How to Add Card Charges to a Report
How to Itemize an Expense
Understanding the Approval Flow
Status of Expense Report
How to Approve Expense Reports

c. Travel Restrictions

Air travel

- Air travel is reimbursable for economy airfare only (traveler is responsible for the upgrade)
- The University will not reimburse or pay for a flight purchased with a traveler's rewards (i.e., Frequent Flier Miles)
- The University does not reimburse excess baggage charges and flight insurance

Preapproval for Business Class Airfare
Business class air travel is approved on a case-by-case basis only, provided that there is sufficient medical documentation to substantiate the need for business class travel. Medical necessity must be documented through EOO.
Travelers seeking to book business class air travel must receive preapproval up to and including the Provost's Office. The Prior Approval for Business Class Airfare Booking form is available here. The form should first be signed by the traveler, and then submitted to the Associate Dean for Administration and Finance, who will then route the form to the Dean and Provost's Office for approval.

Air travel under a Sponsored Program – Federal Travel

- Federal regulations prohibit charging Business Class (or First Class) accommodations
- Travelers must comply with the Fly America Act, which requires travelers to use a U.S. flag air carrier or a foreign carrier that operates under a U.S. Flag air carrier code-sharing agreement and identifies the U.S. flag air carrier's designator code and flight number
- Reimbursement for the cost of food and alcohol is not allowed on federal awards

For further information on Sponsored Program travel, contact the office of Sponsored Programs.

Rail Travel

Business class rail travel is reimbursable to the traveler as long as the total cost of the trip is comparable to, or less expensive than, the lowest available coach airfare.

Rental vehicles

- Do not obtain additional insurance coverage offered by domestic rental companies
- No mileage reimbursement for rental vehicles
- No reimbursement for traffic violation fines or parking tickets

Miscellaneous

- No reimbursement for laundry and dry-cleaning during business travel of fewer than five days
- Personal/vacation days expenses while on a business trip do not qualify for reimbursement

Notes

- Complete airfare bookings at least 14 days before scheduled trip departure
- If renting cars internationally, obtain liability and collision coverage
- For all meal expenses, alcoholic beverages must be separated on the expense report and charged to a non-sponsored cost center or discretionary account (automated in Concur)

Helpful Links

Travel Policy

VIII. Sponsored Research

1. Identifying Funding Opportunities

The SPH Research Office offers resources to help researchers identify funding opportunities to support their work. The Research Funding Opportunities website provides links to federal and non-federal organizations that sponsor research in the areas of public health. For each organization, the website lists its homepage as well as specific funding opportunities and/or requests for proposals. The site is updated regularly to reflect the most current opportunities.

Other Resources for Funding Opportunities for BU Faculty and Staff:

COS Pivot
- BU subscription available with your Kerberos password
- Federal, non-federal, and private sources
- All disciplines
- Search by sponsor or keyword

Foundation Directory
- BU online directory of philanthropic grant opportunities and resources
- Requires BU Kerberos password

BUMC Limited Submissions
- Funding opportunities limiting institutional submissions
- Managed by Andrew Taylor, Associate Dean of Research, BUSM

BU Foundation Relations
- Access to multiple comprehensive databases for grant seeking
- Resources available to BU faculty and staff members

BU Corporate Relations
- BU Corporate Relations builds strategic relationships with industry
- Creating road maps that identify areas of mutual opportunity for BU investigator

Additional External Resources

Grants.gov
- Search 26 federal agencies by research area or keyword
- All relevant forms and documents
- Templates, forms, and FAQs
- Contact info for Program Officers

NIH Guide for Grants and Contracts

- Search NIH Institute Funding Announcements and Notices
- Search Research Training and Development Programs
- NIH Funding Strategies by Institute

NSF Guide to Programs

- National Science Foundation funding opportunities
- Searchable by research area, investigator eligibility, and due date

Principal Investigator Status

University policy defines Principal Investigator (PI) Status as the eligibility to submit proposals for research, training, or public service contracts or grants to extramural agencies, subject to the approval of the Associate Dean for Research and Faculty Advancement. Many faculty are automatically eligible to serve as PIs; those who are not must complete a PI Status Request Form.

NIH Qualifications for New and Early-Stage Investigator Status

NIH has two types of special status for early-career scientists:

- New investigators have not yet received substantial independent NIH funding.
- Early-stage investigators (ESI) are a subset of those having new investigator status who are also within either ten years of completing a terminal research degree or medical residency or equivalent.

Investigators can request an extension of their ESI status past the 10-year window due to special circumstances such as childbirth, family care responsibilities, medical concerns, disability, extended periods of clinical training, natural disasters, and active-duty military service.

For more information on NIH ESI and New Investigators' status, go to https://www.niaid.nih.gov/grants-contracts/new-investigators.

2. Proposal Submission Timeline

On-time submission of grant proposals is important. Proposals submitted without sufficient preparation and review are at higher risk for failure. Electronic submissions have added last-minute challenges to the process, including an unfair burden on grants and administrative staff and more stringent format requirements that may delay or prevent a proposal's submission through the electronic portal.

Investigators, particularly new investigators, are encouraged to start the writing process months in advance of any expected due date. It is not uncommon for an investigator to need two months or longer to produce a fully formed grant application.

SPH grant submission timeline

One month before the grant submission deadline

- PI notifies grant administrator of intention to submit

10 Business Days before the submission deadline:

- PI submits all final administrative components to the Grants Administrator for review.

  Administrative components:
    - cover letter
    - biosketches for all key personnel
    - budget and budget justification
    - animal subjects documents
    - other support disclosures
    - all sub-award documents
    - facilities and resources statement
    - human subjects documents
    - equipment
    - select agents
    - letters of support
    - data safety monitoring plan
    - other attachments, per FOA

- The Grants Administrator will then:
    - notify OSP of intent to submit and provide FOA
    - review, edit, and/or request changes to administrative documents, including all sub-award documents
    - upload final administrative documents and draft technical documents to sponsor portal, including converting budget to required sponsor forms
    - draft Proposal Summary Form and secure approvals from Grants Manager/Department Administrator, PI, Department Chair, and the Associate Dean for Research and Faculty Advancement/Assistant Dean for Research Administration.

5 Business Days before the submission deadline:

- Grants Administrator:
  - submits final administrative components to OSP, includes all BU and sponsor-required documents/forms, except for final technical components
  - completes FCOI and invites investigators to complete
  - facilitates any necessary changes to administrative documents after OSP reviews and provides feedback

3 Business Days before the submission deadline:

- The PI provides all technical components to the Grants Administrator.

  Technical Components:
  - project summary/abstract
  - project narrative
  - introduction (to resubmission)
  - specific aims
  - multiple PD/PI plan
  - bibliography
  - research strategy
  - resource sharing plan

- The Grants Administrator reviews and uploads technical documents to OSP for review.

Helpful Links

OSP Procedures for Proposal Submission
OSP Policy on Proposal Review and Submission
Proposal Summary Form
BU Institutional Numbers and Rates (including University ID numbers, fringe, and F&A/overhead rates)
BU Budget Templates (links)
Sample Budget Justification (NIH)

3. Cost Sharing and Institutional Support

Cost-sharing is a financial commitment by the University toward the total cost of a project from a source other than the granting organization. Cost-sharing is also referred to as "in-kind contributions" or "matching funds." Boston University strongly discourages voluntarily committed cost-sharing when submitting proposals to an external sponsor. In cases where the granting organization requires cost-sharing, proposal submissions should include only the minimum amount necessary to meet the sponsor's requirements. (Note: Over-salary-cap amounts are not considered "cost-sharing.")

Institutional Support is provided in a statement or letter to the sponsor from an institutional official (often the Dean), indicating that resources will be available in support of the project. The types of resources described in such a letter include facilities, mentorship, collaborations, and a commitment to the goals of the project. However, a statement of institutional support does not specify a monetary value unless the proposal includes a commitment of cost-sharing as described above.

SPH Procedures for Cost Sharing Requests

Cost Sharing (Financial Support). Most often, the purpose of institutional financial support is to meet a specific requirement described in the RFA. All requests for SPH funding to supplement a proposal are discussed with the Assistant Dean for Research Administration and/or the Associate Dean for Research and Faculty Advancement as early as possible before proposal submission. Waivers or reductions of indirect costs (i.e., use of a rate less than the sponsor's published F&A rate) are also considered cost-sharing requests and must be requested as far in advance as possible. All letters of institutional support, including financial commitments ("cost-sharing," matching funds," or "in-kind contributions"), are ultimately approved and signed by the Dean.

Any quantifiable financial commitment made on behalf of SPH is considered cost-sharing and, when included in the proposal or budget, becomes legally binding. Upon award, a cost-sharing account is set up in conjunction with the project and monitored by the department and PAFO throughout the project. Cost-sharing account expenditures must adhere to the same financial, legal, and regulatory requirements of the sponsored award.

Process

- The PI reviews the sponsor instructions with their grants manager to determine if the commitment of cost-sharing is mandatory and, if so, at what level.
- The PI or grants manager emails the RFA or Program Announcement to the Assistant Dean for Research Administration to request a commitment of cost-sharing as early on in the process as possible.
- The Assistant Dean for Research Administration and the Associate Dean for Research and Faculty Advancement will review the requirements with the faculty member and grants manager, provide calculation details), and obtain final approval from the Dean.

- The completed cost-sharing arrangement/budget and Dean's approval and will be included in the proposal package.

Institutional Support (Non-financial Support). When requested or recommended by the sponsor, investigators may want to highlight contributions or collaborations by including a letter on behalf of the School. Proposal support letters provided by the Associate Dean for Research and Faculty Advancement or by the Dean may include the availability of school resources (space, administrative support, etc.). These letters reinforce attributes of your proposal, such as the interdisciplinary team or mentorship program, and align with the BUSPH mission.

Letters of institutional support are routinely provided to endorse large program projects, institutional training grants, and projects requiring School leadership and support.

Process

- The PI reviews the sponsor instructions with their grants manager to determine whether there are any specific requirements for the letter of institutional support.
- The PI or grants manager emails the RFA or Program Announcement to the Assistant Dean for Research Administration to request a letter of institutional support as early on in the process as possible.
- The Assistant Dean for Research Administration will work with the PI and grants manager on the language of the letter and obtain final approval from the Dean.

Cost Sharing of Effort

Mandatory/Voluntary Committed cost-sharing. Whether required by the sponsor (mandatory) or volunteered by the PI, commitments become a condition of the award and must be documented and captured in the accounting systems. The voluntary committed effort is reflected in payroll distributions and effort reporting. For example, when the effort is voluntarily committed in the proposal to the sponsor and not charged accordingly, the assumption is still that the effort is committed to the project. The salary drawn from another source is considered cost-sharing and reported as such.

Voluntary Uncommitted cost-sharing. Faculty effort over and above that which has been proposed, committed, or awarded in a sponsored agreement is considered "donated" and is not reflected in distributions or effort reports. For example, the implicit contribution on the part of the faculty responsible for training grant leadership is considered voluntary uncommitted because it is not explicitly obligated as a condition of the training grant award.

4. Award Management and Oversight

Award Receipt

Sponsored Programs will notify departments and principal investigators when an award officially arrives and is processed. Awards can be monitored at "Where's My Award?"

Monthly Review of Grant Expenditures

Department administrators, grant managers, and faculty are expected to review their financial reports every month. OSP provides these tools and resources:

- Recommended GM Reports in SAP Business Warehouse
- Monthly Checklist for Administrators and PIs for Grant Reconciliation

Effort and Salary Distributions

Effort Reporting. BU receives substantial sponsored funding from the federal government. Uniform Guidance, a government-wide framework for grants management, requires educational institution recipients of federal funding to maintain a system that documents and supports individual distribution of activities and associated payroll charges to sponsored agreements. See Effort Reporting for more information.

The **DHHS Salary Cap** restricts the amount of direct salary of an individual under an NIH/DHHS grant, cooperative agreement or applicable contract to Executive Level II of the Federal Executive PayScale. The current salary cap guidance can be found on Grants.gov.

<table>
<tr><th colspan="2">NIH Salary Cap Worksheet
Institutional Base Salary of $250,000 committed to 10% annual effort on an NIH project.</th></tr>
<tr><th></th><th>Amount</th></tr>
<tr><td>Institutional Base Salary (IBS)</td><td>$250,000</td></tr>
<tr><td>Salary cap</td><td>$221,900</td></tr>
<tr><td>Over the cap amount ($250,000 - $221,900)</td><td>$28,100</td></tr>
<tr><td>Effort on project</td><td>10%</td></tr>
<tr><td>Salary allowed to be directly charged to project (10% x $221,900)</td><td>$22,190</td></tr>
<tr><td>Salary to be paid by non-sponsored account (10% x $28,100). Allocate this salary to Over Cap account. Indicate as Cost Share on Personnel Activity Report (PAR).</td><td>$2,810</td></tr>
</table>

Personnel Activity Reports (PARs). Department administrators work with BU's Post Award Financial Operations office to complete Personnel Activity Reports twice a year in two unique periods: January to June and July to December.

After the Fact Review

To ensure that transactions posted are accurate, complete, and recorded in the appropriate account, PAFO has set general After the Fact Review guidelines for review and tracking of transactions.

For additional information on managing an award, please refer to OSP Award Finance FAQ.

5. Award Closeout

Financial reporting and closeout are a shared responsibility between Principal Investigators (PIs), department administrators, and Post Award Financial Operations (PAFO). The financial closeout of a sponsored award begins after all required final financial invoices and reports have been prepared and are ready to be submitted to the sponsor. Financial close-outs should be completed within 120 days of the award end date and include, but are not limited to, the following activities:

Commitments must be closed.

Removal of Over-Expenditures - the department must resolve all over expenditures before the award can be closed. Departments should take the initiative to remove over expenditures and not wait to be contacted by PAFO.

Completeness of Billing and Collections - It is important to note that PAFO is responsible for billing and collecting outstanding accounts receivable. On occasion, PAFO may request the assistance of the PI and/or department administrator to assist with working with sponsors to resolve outstanding accounts receivable issues. Technical reports must be submitted to sponsors following the terms and conditions of the award to ensure timely collection of funds.

Residual Funds (see SPH Policy on Residual Funds)

Funds received for a fixed price, active research projects are restricted for the duration of the study and will be used for the support of that research project. Boston University expects that faculty and departments will direct charge all expenses, including, but not limited to, personnel, fringe benefits, lab supplies, and sub-awards. After the completion of a research project, the remaining residual funds will be transferred to the specified unrestricted account if the following conditions are met:

- Total funding received exceeds total expenditures
- The sponsored agreement is fixed price
- All deliverables have been met
- In the signed agreement, the sponsor does not require the return of residual funds

If the above conditions are met, residual funding will be distributed as follows:

- Indirect costs will be removed from the remaining cash balance at the sponsor-awarded IDC rate
- If necessary, F&A will be adjusted to meet minimal F&A rate of 26%
- The remaining balance (direct costs) will be transferred to faculty member/ PI discretionary fund account
- For a "multi-PI" project, funds will be distributed among principal investigators.
- For projects with "co-investigators," funds will be distributed to the Contact PI.

Award Status Changes in SAP – After all expenses have posted, PAFO will change the award status in SAP to PAFO/OSP to prevent additional charges from being recorded on the award. Once all financial activity has been recorded in SAP (e.g., billings and collections are complete, budgets have been adjusted, and refunds and residual funds have been processed), PAFO will change the award status to Closed.

Other Resources

BU Sponsored Programs Blog - News and Updates from OSP

The **SPH Sponsored Programs Operations Committee** (SPOC) is made up of department directors, grant managers, and administrators involved in the applications, expenditures, and reporting of external funding sources. SPOC is a collaborative forum for research administration issues, including formal training and informal discussions related to the ongoing management of BUSPH research.

Helpful Links

- BUSPH Proposal Submission Timeline
- Application Checklists (Prime and Subaward)
- Sample NIH Budget Justification
- SPH Policy on Residual Funds
- Program Income on Sponsored Awards

IX. Education Policies and Practices

1. Engagement of Course Instructors

Boston University School of Public Health (SPH) is deeply committed to training the next generation of public health leaders, a core element of the School's mission. Our reputation for excellence in public health education rests on the dedication of our outstanding faculty, as well as external teaching professionals who bring their extensive expertise and experience into the classroom.

This diverse group of external teaching professionals (i.e. any course instructor whose primary employment is not at SPH as a primary faculty member) have roles and levels of engagement with SPH that vary considerably, requiring a process to ensure that we are thoughtful, consistent, and clear in our allocation of resources for instructional support. Most often, this group includes:

- Faculty with primary appointments at SPH but who are are not employed by SPH as their primary employer (e.g. primary employment at VA or Slone Epidemiology Center).
- Faculty with secondary appointments at SPH. This includes faculty who hold primary appointments at other Boston University schools or colleges (e.g. BUSM) and hold secondary appointments at SPH.
- Faculty with adjunct appointments at SPH. This includes professionals or scholars whose primary place of employment is not BU or whose primary employment within BU is not in a faculty role.
- Public health professionals otherwise unaffiliated with BU. This includes professionals or scholars who do not have a faculty appointment at BU and whose primary place of employment is outside of BU.
- Postdoctoral associates or research scientists who have teaching responsibilities described in their appointment letter as part of their core duties and responsibilities.

Under special circumstances, other staff employed by SPH may be engaged to teach a particular course provided that the staff member has the appropriate academic credentials and practical expertise to provide quality instruction. If a staff member with such expertise has expressed interest in engaging in teaching, the following steps apply:

- The relevant Department Chair will reach out to the staff member's supervisor to ensure the staff member's performance is in good standing and that the course instruction time and engagement with students will not conflict with the staff member's core duties and responsibilities of the role which they were hired to carry out at SPH.
- Upon ascertaining that the staff member has a) been regularly performing at a "Successful" or above level in their core role and that b) serving as an instructor for a given course will not conflict with the staff member's core work hours/core duties of their position, the requesting chair will obtain written approval via email from the Associate Dean for Administration and the Associate Dean for Education.

The Associate Dean for Administration will then approach the staff member to ascertain interest in the teaching opportunity and that the teaching will not conflict with core responsibilities. Provided there is such expressed interest and the staff member's concurrence in writing, the staff member may be engaged to serve as the instructor for the particular course.

Requesting and Recruiting

Requests for approval for external teaching professionals for a specific teaching role are made by the chair and approved by the Dean. The Dean may delegate approval to the Associate Dean for Education.

Requests for external teaching professionals must be made during the annual budget process, which takes place in March for the upcoming academic and fiscal year. Chairs should prepare a proposal that discusses the need for the appointment of external teaching professionals and include information on a proposed candidate if one has been identified. If an individual has not been identified to teach and the request is approved, a placeholder identifying the approved teaching slot will be included in the department budget. It is important to note that conversations regarding approval of teaching roles or related compensation should not take place with potential candidates until after the review process has been finalized.

To request the engagement of an external teaching professional, department chairs and center directors must submit the External Teaching Professional Request Form to the Associate Dean for Education by the appropriate deadline below.

Anticipated semester of teaching	Deadline to Identify Instructor	Letter of engagement sent by
Fall	March 1	July 1
Spring	July 1	November 1
Summer	November 1	March 1

Once approved, the terms of the engagement and related service will be defined and letters of engagement sent by the Associate Dean for Education to each external teaching professional. The letter will describe the course(s) to be taught (pending adequate enrollment) and level of compensation, with a copy to the department chair. This process will allow us to gather all of the information necessary to properly communicate the terms of engagement and ensure that the appropriate compensation is received in a timely manner.

It is extremely important that the department identify the external teaching professionals by the deadlines outlined in the table above. The deadlines are intended to ensure that instructors (a) receive payment on time, (b) have access to Blackboard and other services, and (c) have the opportunity to take advantage of teaching and advising resources prior to the start of the semester. These same deadlines apply to returning external teaching professionals who may have taught in previous semesters. Department administrators should follow up with their individual external teaching professionals to be sure that they have received their ID and appropriate access.

Compensation

In the majority of cases, course instructors have primary faculty appointments at SPH and are compensated via salary coverage as per the rubric described in Section V.2.A.

Most external teaching professionals are compensated at a flat rate that is determined by the University and adjusted each year. Typically the funds are paid directly to the individual; however, faculty with primary appointments at another School or College within BU also have the option of applying the funds toward covering their BU salary or having the funds deposited to their BU discretionary account.

Postdoctoral associates and research scientists may receive salary coverage as per the normal coverage rubric (i.e. 15% for a 4 credit course, prorated by number of instructors and/or credits) provided that the teaching responsibilities are described in their appointment letter as part of their core duties and responsibilities.

Once the external teaching professionals have been approved by the Associate Dean of Education, payments will be coordinated centrally using the information provided via the request form.

Communication and Onboarding

- Prior to assigning a course, ETPs are contacted via email or phone by the Chair or designee to discuss available opportunities to teach a course before formally making the assignment.
- Department Chairs or their designees will notify an external teaching professional via email that they have been assigned to teach a course. In time-sensitive situations phone follow up may occur, with conversation being recapped via e-mail.
- A letter of engagement from the Associate Dean of Education is subsequently sent to the ETP detailing the assignment, related compensation and any other relevant BU policies as applicable.
- Once an ETP has been engaged to teach a course, the department academic program administrator or director of administration reaches out to the ETP to ensure they are appropriately onboarded by ensuring they have a BUID, active BU email account and that they understand any relevant training materials and other prerequisites necessary to prepare one for teaching at BU. Resources for course instructors are also shared as part of this onboarding.
- Enrollment is monitored in the weeks leading up to every semester start. In some cases, course cancellations must occur due to low enrollment, which may result in an external teaching professional not being assigned to a course they had previously been assigned to teach.
- Every time a class cancellation results in an external teaching professional not being assigned, the Department Chair or designate will email the affected ETP; a follow-up phone call may also occur.
- Course evaluations and any other assessment of performance is shared with the ETPs and will, as is appropriate on a case-by-case basis, be followed up by a conversation with the Chair about how these may affect future engagement

2. Teaching Assistants

Teaching assistants (TAs) play an essential role in our educational mission. The administrative details related to the administration of TAs at SPH are summarized below.

Allocation

- The School supports a 0.5 FTE TA for every 10 students enrolled (e.g., 10-19 students enrolled = 0.5 FTE TA; 20-29 students enrolled = 1.0 FTE TA, 30-39 students enrolled = 1.5 FTE TA, etc.)
- For courses with 70 or more students enrolled, 4 TAs will be supported. For courses with 90 or more students enrolled, 5 TAs will be supported.
- Faculty may use discretionary funds to support TAs beyond school-established thresholds.

Timeline

- School-supported TAs are automatically allocated for fall semester courses based on enrollments as of August 1, for spring semester courses based on enrollments as of December 1, and for summer semester courses based on enrollments as of April 1.
- Faculty wishing to support TAs using discretionary funds must notify their Academic Program Administrator by August 1 for fall semester courses, by December 1 for spring semester courses, and by April 1 for summer semester courses.
- If enrollments change, TA allocations are adjusted accordingly, with final allocations set no later than 10 days before the start of classes for that semester to allow adequate time for processing.

Processing

- All TAs are processed centrally. Current students are hired through Student Employment and alumnae and unaffiliated individuals are hired as temporary employees.
- A TA Payment Request Form must be completed for each TA. In some departments, forms are completed by Academic Program Administrators (APAs), and in others, faculty complete the forms. The online form captures information about the course, the instructor, whether the TA will be supported by discretionary funds, if the TA is a current student or an alum, and if the TA is an international student.
- Once the TA request form is completed, the Education Office will notify the APA or the faculty member if the TA needs to complete hiring paperwork (e.g., I-9 and W-4 forms, FERPA non-disclosures). These forms must be completed in a timely fashion to ensure that the TA can be set up and paid.

Student restrictions per University policy

- Graduate students (full or part-time) enrolled in a program should not work more than 20 hours per week while attending classes.
- Full-time graduate students, either by registration or by certification, may not work more than 20 hours per week at Boston University (including research assistantships) during any academic period: fall semester, spring semester or either summer term.

- International students on a student visa are limited by federal regulations to no more than 20 hours of on-campus service per week, which for purposes of the regulations includes graduate teaching fellow and research assistant appointments and any additional on-campus employment. This means that international students on a full teaching fellow or full research appointment (20 hours/week during any semester) are not eligible for additional on-campus work, even if the University employment policy would otherwise allow it.
- Full-time doctoral students may serve as a TA according to their program-specific guidelines.
- International students who are working as Resident Assistants may not work as a TA. Additionally, international students must comply with all policies and visa requirements as outlined on the ISSO website.
- Domestic students who are working as a Resident Assistant must request approval for an exception to the student work hour policy. Exceptions will only be granted in cases where the additional hours of work clearly benefit the student's academic or professional development and do not substantially slow the student's degree progress.

Staff restrictions

In cases where staff are considered for TA positions, approvals by both the Associate Dean for Education and the Associate Dean for Administration and Finance are required. Certain staff members of the BU community may qualify to serve as TAs, provided that serving in this role will not conflict with their core duties as a staff member. The following conditions apply:

- Full-time staff who are also part-time students are not eligible to serve as TAs.
- The maximum service that any staff member can serve as TA for is one course (4 credits) per calendar year. Overbase payment applies to any staff engagement as TA. (Note that only exempt level staff are eligible to be engaged as TAs)
- For centrally funded staff positions, time allocated toward TA duties cannot occur within an employee's regularly scheduled work hours for their staff position. De-minimis use of email during regular work hours toward TA duties is at the discretion of the staff member's manager as long as it remains just that – minimal in nature – and does not conflict with the duties and responsibilities of the staff member's full-time position.
- Research staff funded from sponsored programs must comply with the University's effort reporting requirements, and PIs must ensure that effort is reported accurately. It is the PI who determines whether serving in a TA role would interfere with an employee's core duties as a staff member. Therefore, the staff member may serve as a TA if they receive written PI permission to engage in such duties, whereby the PI attests that they will ensure that research staff devote the reported effort to sponsored projects. There should not be a need for staff grant effort reduction unless the PI provides alternative guidance.
- Unless there is documented Provost approval, no full-time staff may serve as instructor or co-instructor for any course.

In instances involving requests to engage a staff employee as a TA, applications must be submitted at least one month prior to the timelines outlined above to allow time to secure necessary approvals.

X. External Partnerships: Affiliation Agreements, Contracts, and MOUs

SPH deans, department chairs, faculty, staff, and students may not sign binding agreements, contracts, or memoranda of understanding. Binding agreements may only be signed by the Office of General Counsel and/or the Provost.

Affiliation Agreements

Affiliation agreements are commonly requested by clinical institutions such as academic medical centers, community health centers, and hospitals that are providing training opportunities to SPH students at their sites. These are common for students completing practica or internships and for course-based consulting projects. The Office of General Counsel (OGC) reviews all affiliation agreements, and once they are approved, the agreement is signed by the Medical Campus Provost. Please contact idea hub at ideahub@bu.edu for assistance.

Note that affiliation agreements can take up to 30 days for processing.

Contracts

Contracts can take many forms, including research collaborations, teaching agreements, and agreements for goods or services rendered. Because contracts can relate to many types of work, each is handled on an individual basis. Please contact idea hub at ideahub@bu.edu for assistance.

Memoranda of Understanding (MOUs)

Similar to contracts, memoranda of understanding (MOUs), can take many forms. The University has a process and form developed for unfunded research collaborations, and other types of MOUs may follow a custom approach. idea hub is available to assist any members of the SPH community with an MOU.

XI. Finance

1. Finance Systems and Access

Boston University has several finance-related systems, summarized below. Each section contains links for training and guidance available from the University.

Access to these systems is based on business need and is limited to Boston University employees. Student employees should only access their personal/academic information through Student Link and are restricted from using any other system within the School of Public Health.

To inquire about access to these systems, get additional training, or have questions answered, staff should contact their manager, the SPH Finance Team for finance-related matters, or the SPH Registrar for student or academic matters.

SAP

SAP (System, Application & Products in Data Processing) is the University's central system for business operations, including accounting, finance, and human resources. SAP is accessed through BUworks Central Portal, described below.

BUworks Central Portal

BU Works is Boston University's integrated SAP ERP system designed to provide administrators and faculty with more efficient financial management, human capital management, and procurement capabilities. BUworks improves the ability to plan and manage by fostering collaboration and consistency of information. Access to the following sections of BU Works is determined by the user's role and responsibilities at the School of Public Health:

- Employee Self-Service – Provides easy access to information and service for employees
- Finance – Provides access to Finance portal functions. Most are restricted to Central users and ISR providers
- ACCT Xwalk – Provides a translator to convert account information from legacy ACK to SAP and from SAP to legacy ACK
- Reporting – Provides access to Business Warehouse (BW) reports for each of the BUworks functional areas
- Procurement – Provides access to procurement functions
- Worklist – Shows Task, Alerts, Notifications, and Tracking for workflow items
- WebGUI – Provides direct access to SAP ECC (see next section for additional information)

All SPH faculty and staff should bookmark the BUworks Central Portal: https://ppo.buw.bu.edu/.

Concur

Concur is the University's travel and expense management system. It allows for easy online bookings for travel, increased visibility into expenses, and quick reimbursement turnarounds for out-of-pocket expenditures. Full-time faculty and staff (paid through the University payroll system) are eligible Travel Card users, and all faculty and staff who engage in University/grant sponsored travel are encouraged to have a Travel Card. For additional information about Concur and how to book your travel and out-of-pocket expenses, please visit the Travel section of this Handbook.

Internal Service Request (ISR)

An Internal Service Request (ISR) is used by departments to request goods or services from other Boston University departments. Internal Services include University-owned service providers (e.g., Publications Production), as well as contracted suppliers located on campus (e.g., Dining Services/Aramark). For additional information on how to create an ISR, please visit the Purchasing section of this Handbook.

Facilities Service Request (FSR)

A Facilities Service Request (FSR) is used by departments to request services from the Facilities Management and Planning department at Boston University. Facility Services include renovation requests, event set-up, classroom supplies and services, snow removal, security systems, telephone and data network services, parking, and towing. For additional information on how to create an FSR, please visit the Purchasing section of this Handbook.

The Links

The Links are portals that provide secure access to online services and confidential information for faculty, staff, and students.

- **Business Link** contains full administrative functions for Auxiliary Services and Student Employment. Business link also archives historical financial, sourcing, and procurement systems (through FY 2011).
  - **Student Employment** is the main hub for student employment, including:
    - Reviewing a student job listing
    - Hiring a student, including required documentation like I-9s
    - Terminating a student
    - Approving/editing timesheets
    - Adjusting a student's pay rate or start and end date
    - Changing how a student is being paid (i.e., grant)

- **Faculty Link** provides faculty access to all official academic information, including class schedules, class lists, advisee lists, and academic and contact information for students in their current classes. Faculty also post final grades for their courses and send emails to a class list using Faculty Link.

- **Faculty/Staff Link** provides authorized SPH users to access academic information, including student lists, instructors' schedules, and past University schedules.

- **ShareLink** provides secure access to academic and financial information to parents, employers, and other interested third parties, as designated by students.

- **Student Link** enables students to view their personal, academic, financial, and other information relevant to their studies at Boston University.

PCard

The Boston University Purchasing Card (PCard) Program provides an efficient means of making routine purchases by reducing paperwork, allowing control and responsibility at the school or department level, and streamlining the purchasing cycle for low-dollar purchases. Full-time faculty and staff (paid through the University payroll system) are eligible PCard users, though departments typically elect one PCard holder for the unit.

Procurement (SRM)

Procurement is accessed through BUworks, which provides a set of SAP and third-party applications designed to integrate the University's procurement processes. These functions provide purchasing services to employees, enabling them to procure goods and services to support the University's business. For additional information about Procurement (SRM) and the different methods of purchasing available to SPH employees, please visit the Purchasing section of this Handbook.

TerrierTemps

TerrierTemps is accessed within the Procurement tab in BUworks. TerrierTemps is Boston University's contingent workforce management program. **All requests for temporary labor through staffing agencies must be submitted through the TerrierTemps program.**

WebGUI

WebGUI is accessed through BUworks and provides direct access to SAP ECC, including accessing Boston University's General Ledger and creating transactions. An introduction to WebGUI is available at http://www.bu.edu/tech/support/buworks/help/finance/. Within the User Menu, you will see a list of specific SAP transaction codes (t-codes) that relate to your role and responsibilities within the School of Public Health.

Helpful Links

BUworks Details
About BUworks
TerrierTemps – Shopper's Guide
TerrierTemps – Getting Started

2. Funds Management

The Funds Management section explains the general structure, terminology, and proper usage of funds and the University's accounting procedures through SAP. All faculty and staff with funds management responsibilities are required to attend Funds Management training.

a. Fund Centers/Cost Centers and Numbering Convention

Fund centers (also referred to as Cost Centers) support budgets at the department level and are used to track revenue and expenditures within an organizational unit (e.g., SPH departments).

Each Fund Center number has a ten-digit code based on five different elements:

- Business area (one digit)
    - 1 – CRC
    - 2 – BUMC
    - 3 – NBL
    - 8 – SUB
- School/college (two digits). The SPH code is 44.
- Department (three digits)
- Type of fund (two digits)
    - 00 – general
    - 60- debt
    - 70 – capital projects
    - 95 – MOA – cost reimbursements
- Departmental activity (two digits)

Because all SPH departments are on the same campus, all SPH fund centers begin with 244 (the campus code, followed by the SPH code).

Helpful Link

SAP Enterprise Structure

b. Account Types

Internal Order/Funded Program/Sponsored Program

An Internal Order (IO), also referred to as Funded Program or Sponsored Program (for Grant accounts), resides within a Fund Center and is used to allocate budgeted funds that support a specific strategic initiative.

The account structure used for Internal Orders is as follows:

- Each account number has a ten-digit code that begins with the number 9.
- The second and third digit indicates the Internal Order Type (IO Type)
    - 09 – designated general
    - 20 – endowment principle

  - 21 – endowment sep invest
  - 25 – endowment spendable
  - 30 – gifts
  - 32 – gifts – building
  - 34 – undesignated gifts
  - 35 – gifts pledged
  - 50 – grant – federal
  - 55 – grant – non-federal
- The last seven digits are system-generated. They have no meaning and are not specific to any school or department.

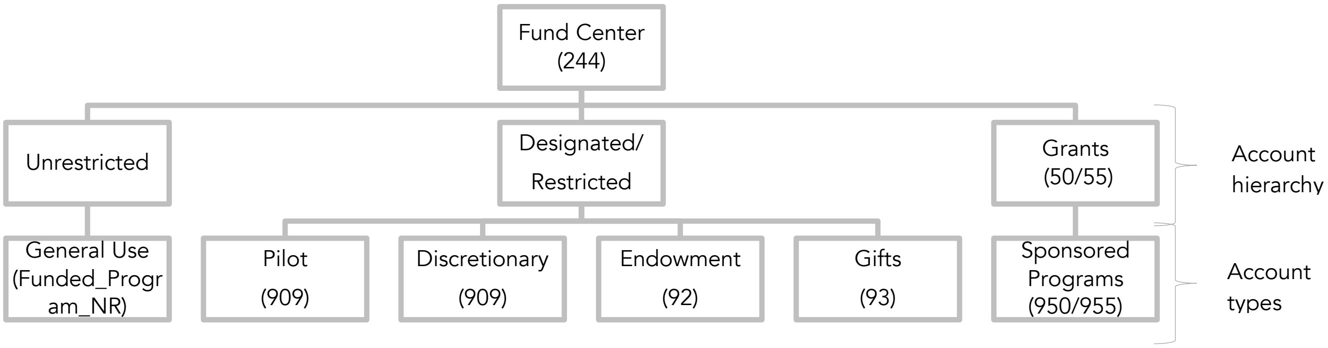
Examples

- 909xxxxxxx – Designated General. Pilot accounts, discretionary accounts, etc. Often referred to as "909 accounts."
- 930xxxxxxx – Gifts
- 950xxxxxxx – Grants – federal
- 955xxxxxxx – Grants – non-federal

Notes

- All Internal Orders/Funded Programs/Sponsored Programs reside within a Fund Center
- All Internal Orders/Funded Programs/Sponsored Programs accounts begin with a 9

c. Account Hierarchy



d. Unrestricted/General Use Funds

Unrestricted funds are distributed annually and are used to support each SPH department's structural operating expenses. Typical charges found under this type of accounts include salaries, personnel training, office expenses, and technology. Although the use of these funds is unrestricted, they must follow Boston University accounting rules and SPH best practice guidelines.

When running Business Warehouse reports, there is no Internal Order (or "Funded Program") designation for unrestricted accounts. Instead, Business Warehouse reports categorize the Funded Program as "Funded_Program_NR" (Funded Program not relevant).

e. Designated/Restricted Funds

Designated Funds are general use funds that support a particular purpose or project at SPH.

Restricted Funds, on the other hand, carry explicit stipulations that must be met before the funds can be spent. Funding provided by sponsored agencies or corporations for a specific grant or contract work is also considered restricted.

The School of Public Health has four types of Designated/Restricted Funds:

- Pilot Awards Program (909) - The SPH Pilot Awards Program offers multiple funding opportunities to support research and education initiatives that are carried out by our faculty members.
- Discretionary Funds (909) - Each faculty member with a primary faculty appointment at SPH (above the rank of Instructor) has an individual discretionary account. Funds in these accounts can be used by the faculty member to support their research, teaching, and service activities and to invest in their professional growth and development.
- Gift Funds (93) - Gifts are irrevocable transfers of assets, i.e., contributions from private sources, for which no goods or services are expected, implied, or forthcoming in return to the donor, and in which no proprietary interests are to be retained by the donor.
- Endowment Funds (92) - Endowment Funds are resources received by the University that help to provide a sustainable level of support for the University's operating budget. The donor gift or principal amount is invested in the University pooled endowment to provide both income and long-term growth. Individual endowment funds comprise a specific number of "units" or shares within the University endowment that generate annual income either for distribution use or returned to the principal.

f. Grants (50,55)/Sponsored Programs (950, 955)

Grants or Sponsored Activities are those undertaken by the University with the support of an external entity that expects in return specific outcomes that either directly benefits the provider or a public purpose.

At a minimum, the provider requires the University to report on how the funds were spent or what progress is made to accomplishing the goals of the activity. To differentiate funding sources and track financial transactions for each activity, Boston University uses the structure for grant accounts:

- Grant accounts reside within a Fund Center to identify the School and Department responsible for administering the funds.
- Grant accounts funded by the Federal Government start with the two-digit code 50.
- Grant accounts funded by sources other than the Federal Government start with the two-digit code 55.

Generally, multiple Internal Orders, most commonly referred to as Sponsored Program accounts, are associated with one particular Grant and are structured as follows:

- Federal Grant accounts that begin with 50 contain Sponsored Program accounts that begin with 950.
- Non-Federal Grant accounts that begin with 55 contain Sponsored Program accounts that begin with 955.

Note that Internal Order numbers associated with a grant will not necessarily be in sequential order. For example, Grant # 50123456 may have order numbers 9500423783, 9500127400, and 9500374259 for years 1, 2, and 3.

g. Account Set-Up, Maintenance, and Closeout

Requesting new accounts. The procedure for creating a new Fund Center or Internal Order accounts will vary depending on the type of account and funding source.

Please contact the following departments for assistance on creating new accounts:

- Fund Center (244) – SPH Finance Team
- Discretionary (909) – SPH Finance Team
- Gift (92) – SPH Development and Alumni Relations
- Endowment (93) – SPH Development and Alumni Relations
- Sponsored Program (95) – SPH Department Research Administrator

Note that Sponsored Program Pre-Award Accounts can be set up to 90 days in advance of the actual award start date or in advance of delayed receipt of an award. The Office of Sponsored Programs will assist with the Pre-Award Account and the completion of the IPAR form.

Maintaining current accounts. Monthly and quarterly reports should be run for each type of account to review the status of existing funds and the rate of spending. Certain Sponsored Programs will be required to produce periodic reports as part of the funding contract.

Please visit the Reporting, Reconciliation, and Corrections section of the handbook for information on running financial reports.

Closing out empty/retired accounts. The procedure for closing out empty or retired accounts will vary depending on the type of account and funding source.

Please contact the following departments for assistance on closing out empty or retired accounts:

- Fund Center (244) – SPH Finance Team
- Discretionary (909) – SPH Finance Team
- Gift (92) – SPH Development and Alumni Relations
- Endowment (93) – SPH Development and Alumni Relations
- Sponsored Program (95) – SPH Department Research Administrator

Note that Pre-Award Accounts allow for efficient accounting of sponsored awards' spending and remove the need for creating correcting Cost Transfer Journal Entries later on.

h. General Ledger (GL) Accounts

The general ledger is an accounting document that provides a general overview of an organization's financial transactions. An account, or general ledger (GL) code, is a number used to record business transactions in the general ledger. Boston University stores every general ledger (GL) code in the SAP system.

GL Coding Principles

- All General Ledger accounts have a 6-digit number
- The first digit of GL account number indicates the type:
  - 1xxxxx – Assets
  - 2xxxxx – Liabilities
  - 3xxxxx – Net assets (fund balance)
  - 4xxxxx – Revenue
  - 5xxxxx – Expenses
  - 8xxxxx – Allocations
- Payroll related GL account numbers range from 500010 to 500560, plus stipend GLs 523100 and 523105
- ISRs and FSRs are identified by leading digits = 89
- When creating and coding Ariba Guided BUying purchase requisitions, disbursement forms, and travel/PCard transactions, please remember to:
  - Use the most appropriate GL account for the transaction(s)
  - Ensure that the correct Fund Center, Internal Order or Sponsored Program is being charged
  - Enter a meaningful text or description for each activity booked
  - Include attachments as appropriate
  - Periodically compare the transactions you recorded to what was posted in BU's Business Warehouse reports

SPH GL Accounts Short List

When looking to code travel or PCard expenditures, departmental and interdepartmental transactions, purchasing, etc., please refer to the SPH GL Codes Short List to find the most appropriate GL account to use.

Note that Unallowable does not mean that the SPH is not allowed to incur these costs; it merely means the government is not willing to pay for them, either directly or indirectly, through government contracts.

Helpful Links

- BU's GL Income and Expense Account Descriptions
- Useful SAP Account Numbers and Doc Types

3. Reporting, Reconciliation, and Corrections

Reporting and reconciling our accounts every month is one of the easiest ways to create a solid foundation for evaluating our School's performance and financial health. The BUworks Finance component provides an integrated infrastructure that supports the budget, finance, procurement, and research administration and intended to improve the University's ability to plan, manage, and transact financial data. Access to the reporting feature in SAP is dependent on a user's role at the School of Public Health.

This section gives an overview of reporting, reconciliation, and corrections. Detailed instructions for these actions are available on the BUworks help website. Faculty and staff may also contact the SPH Finance Team for assistance.

Report Types

BUworks categorizes reports into two types:

- Funds Management refers to unrestricted and designated/restricted accounts. This includes general use, pilot, discretionary, endowment, and gift accounts.
- Grants Management refers to all sponsored programs.

These reports are available on the Reporting tab >> Accounting (FI) section of BUworks.

Business Warehouse (BW) reports accesses a tremendous amount of data at both the summary and detail level. Reports are flexible, customizable, and easy to use once you become familiar with the basics of BW reporting.

- **Transaction detail.** The Transaction Detail report provides detailed information on each transaction and allows the user to view actual postings as well as committed funds for the account.

- **Unrestricted budget to actual by FC – GL/CI detail.** The Unrestricted Budget to Actual report displays a summary view of unrestricted accounts for one or more fund centers. It provides a snapshot of budget (can be broken out by recurring and non-recurring), income/expense actuals, payroll actuals, and commitments and includes unexpended budget and percent of budget expended.

- **Designated/restricted balance and activity – GL/CI detail**. The Designated/Restricted Balance and Activity report display a summary view of designated and non-grant restricted accounts for one or more fund centers. The report provides a snapshot of balance carry-forward from the prior year, income/expense actuals, payroll actuals, and commitments. Also, it includes an unspent budget and percent of the budget already spent. Data is displayed for fiscal year-to-date through the period specified.

Some helpful notes about reports:

- Some cells may be merged; this will prevent filtering or sorting the data. Be sure to unmerge the entire spreadsheet to alleviate this problem.
- Period/fiscal year is a required field. BU's Fiscal Year runs from July 1 through June 30. Thus, July is the first fiscal period and is represented as period 001 in SAP. August is period 002, and so forth.
- The transaction details report indicates how the item was purchased via document type (PCard, invoice [purchase requisition]). Purchases made using Ariba Guided BUying also display the vendor invoice, PO number, purchase requisition number, etc.
- It is possible to store custom reports. Once a View has been saved, it can be reused, saving time, reducing the chance of errors, and increasing efficiency. See How to Save and Use a View.

Helpful Links

BUworks Training - Intro to BW Reporting
BUworks Finance
FM/GM Data Glossary
How to Export Report Data to Excel
Add, Remove, and Move Data within a Report (needs Kerberos Login)
How to Run FM Unrestricted Budget to Actual by Fund Center
How to Run FM Designated Restricted Balance and Activity
How to Drill down to Additional Detail

Reconciling monthly expenses

Reconciling expenses is how to ensure the expenses within the fund center are accurate, and the department is staying within their allocated budget. Reconciling an account means proving or documenting that an account balance is correct. Performing reconciliations is important and should be completed monthly. This will ensure that all transactions posted to a fund center or internal order are complete, accurate, and recorded in the appropriate account. Reconciliations also help SPH departments identify and quickly report fraudulent transactions, compliance issues, or any other inappropriate or unusual activity.

To reconcile the transactions listed within your fund center or internal order:

- Download the appropriate report within Business Warehouse
- Export these reports into an Excel spreadsheet

Account administrators should evaluate the following when reconciling their accounts:

- Budgets are not overspent; expenses are correct and allocable
- Commitments are accurately reflecting upcoming expenditures
- PCard and Travel Card transactions have posted appropriately

See BUworks Finance Tools for Reconciling and BU After-the-Fact Review for monthly reconciliation training and tools.

Journal Entries and Corrections

Corrections and adjustments are made via a journal entry. Journal entries are an essential part of managing revenue and expenses within the University.

Please see bu.edu/tech/support/buworks/help/finance/ for detailed instructions on creating and tracking journal entries.

4. Purchasing

The purchasing section gives an overview of policies and procedures developed to accomplish the procurement needs of all schools and departments within the Boston University community. This section applies to all individuals purchasing goods and services on behalf of the Boston University School of Public Health.

There are several ways to make purchases at Boston University:

- Ariba Guided BUying ****preferred method****
- PCard
- Travel Card
- Procurement contracts
- Internal Service Request (ISR)
- Facilities Service Request (FSR)
- Disbursement Request

a. Ariba Guided BUying

The preferred method of ordering and payment at Boston University is an invoice through Ariba Guided BUying.

There are four methods of purchase on Ariba:

- **Guided BUying Catalog Order:** Requisitions created to purchase through catalogs in Guided BUying.
- **Non-Catalog Request (Amount Based):** Requisitions created when you are unsure the final amount to be spent.
- **Non-Catalog Request (Standard):** Requisitions created when you cannot find what you need in Guided BUying.
- **Blanket Purchase Order (BPO):** Process used to purchase products/ services off a contract, which suppliers can invoice directly against. Note: BPOs do not encumber funds and are only set up by Sourcing & Procurement.

Important Note: Amount Based and Standard PRs (Non-Catalog Requests) for less than $10,000 do not route to S&P and will be automatically transmitted to the supplier. If you attach a contract to a PR less than $10,000, it will not be reviewed by Sourcing & Procurement; a Contract Request Form must be completed to have your contract reviewed. Please review the SPH Vendor Engagement and Contract Review process for School specific policy, Section VII.1 of this Handbook.

Non-Catalog Requests are used to create PRs for one-off purchases for services or products that are not in a supplier catalog in Guided BUying. Suppliers must be assigned to a PR before submitting the PR.

Supporting Documentation: for non-catalog requests please provide all supporting documentation available to show the necessity of a non-catalog purchase. You may be asked to provide a Sole Source Justification form. Other documentation we recommend you attach include quotes, proposals, or descriptions of services.

For detailed information on How to Place Orders, please see https://www.bu.edu/sourcing/h2po/.

Important Note: Invoices must be submitted by the supplier directly through Ariba. When your purchase is made with a registered supplier, they will receive an email notification with instructions on how to attach the necessary documentation. Please remind your Vendors to include a Purchase Order number to their submission. Invoices without a valid Boston University Purchase Order number referenced will not be processed.

Helpful Links

SPH Vendor Engagement and Contract Review Policy
Boston University Sourcing and Procurement
Boston University Sourcing and Procurement FAQs
BU Sourcing Suppliers

b. Purchasing Card (PCard)

The Boston University Purchasing Card ("PCard") Program is designed to provide an efficient means of making routine purchases by reducing paperwork, allowing control and responsibility at the school or department level, and streamlining the purchasing cycle for low dollar purchases.

Typical purchases made by cardholders

- Low dollar material or supply items not available through SAP SRM
- Photocopy expenses
- Employment advertising, job postings in newspapers, journals, internet, etc.
- Books, newspapers, magazines, journal, research or online service subscriptions
- Express mail shipping charges, couriers, and postal meters
- Dues and memberships (e.g., business-related associations, etc.)

Restrictions and limitations

- Purchase of items for personal use
- Local and non-local travel expenses (including off-campus meals, fuel/gasoline, car rentals, etc.)
- Purchases that are subject to special regulations or require detailed documentation or special authorization
- Furniture, drapes, and carpeting; equipment leases; consulting services; mortgages, rents, and real estate taxes; translations and interpretation services; radioactive and controlled substances; service and maintenance contracts; legal fees; employee relocation services; donations

- Payments subject to reporting on IRS Form 1099-MISC: PCard payments that would require 1099-MISC reporting to the Internal Revenue Service are prohibited, including
    - Human subjects
    - Independent Contractors providing services such as attorneys, health care or medical services, performers, space/facilities, guest speakers/lectures, honorarium, physicians, royalties

Gift cards are expressly prohibited from being charged on any university funds for employees as they constitute reportable taxable income. Should departments opt to purchase gift cards for employees for events such as an employee giving birth, etc., they may do so using personal - not school - funds.

Full-time faculty and staff (paid through the University payroll system) are eligible PCard users.

Note: Student employees are not eligible to hold PCards. Lending or sharing a PCard is strictly prohibited. Staff should work with their managers to request a PCard, if required for their position.

Helpful Links

When to use the Travel Card vs. PCard
PCard Policy
Applying for a PCard
Boston University Card Services

c. Travel Card

The University Travel Card is a corporate-liability Visa card, meaning that it is directly billed to and paid for by the University. It helps eliminate the need for cash advances and reduces the financial burden on the traveler.

Typical purchases made by cardholders

- Travel transportation (airfare, car rental, train, taxi, etc.)
- Accommodations
- Meals, including business meals
- Incidentals
- Conference registration fees and related travel transportation/accommodations
- Passport/visa fees

Restrictions and limitations

- Purchase of items for personal use (the only exception is for “ancillary” personal expenses)*
- Purchases that are subject to special regulations or require detailed documentation or special authorization
- Furniture, drapes, and carpeting; equipment leases; consulting services; mortgages, rents, and real estate taxes; translations and interpretation services; radioactive and controlled substances; service and maintenance contracts; legal fees; employee relocation services; donations

- Payments subject to reporting on IRS Form 1099-MISC: Travel Card payments that would require 1099-MISC reporting to the Internal Revenue Service are prohibited, including
    - Human subjects
    - Independent Contractors providing services such as attorneys, health care or medical services, performers, space/facilities, guest speakers/lectures, honorarium, physicians, royalties

Additional expenses that are prohibited with the Travel Card: Amazon purchases, charter buses (without prior approval from Sourcing & Procurement), gift cards, personal auto repairs, lost/stolen property replacement, trip protection/trip cancellation insurance, in-flight movie purchases, airline upgrade fees (unless administratively burdensome to use a personal card), cell phone charges/bills, newspapers and magazine not related to the business purpose of travel, frequent flyer mileage fees, personal EZ pass, taxi voucher booklets, toiletries, additional domestic car rental insurance, hotel entertainment (including fitness room fees, non-ancillary personal purchases.

Gift cards are expressly prohibited from being charged on any university funds for employees as they constitute reportable taxable income. Should departments opt to purchase gift cards for employees for events such as an employee giving birth, etc., they may do so using personal - not school - funds.

Please note alcoholic beverages must be separated on the expense report and charged to a non-sponsored cost center or discretionary account (automated in Concur)

Full-time faculty and staff (paid through the University payroll system) are eligible Travel Card users. Staff should work with their managers to request a Travel Card, if required for their position. To obtain a Travel Card, please complete the online Travel Card application and Responsibility and Financial Liability agreement. Once the form is submitted, the Travel Department will be in contact with the employee to provide instructions to move forward.

Note: Student employees are not eligible to hold Travel Cards. Lending or sharing a Travel Card is strictly prohibited

*"Ancillary" personal expenses are personal expenses incurred when making a purchase that is primarily for Boston University business purposes, and when the personal portion of the expense cannot be easily separated from the business portion when incurring the expense. A personal side trip that is part of an airline ticket purchased to attend a conference or a rental car arrangement that includes some personal mileage are examples of ancillary personal expenses.

Helpful Links

When to use the Travel Card vs. PCard
Travel Card Policy
Applying for a Travel Card
Boston University Travel Services

d. Procurement Contracts

Contracts are intended to enforce promises that were entered into voluntarily by two or more parties. Procurement contracts can cover anything from goods to services to equipment that the University intends to purchase.

Sourcing and Procurement is responsible for engaging suppliers in contract negotiations as well as providing them with the appropriate contract for their goods or services. Sourcing & Procurement is also responsible for negotiating any of the business terms of the contract. The Office of General Counsel assists Sourcing and Procurement by providing the contract templates as well as negotiating legal terms.

SPH deans, department chairs, faculty, staff, and students may not sign binding agreements, contracts, or memoranda of understanding. Binding agreements may only be signed by the Office of General Counsel and/or the Provost.

Bid Policy

Sponsored Research purchases of $10,000 or more and all purchases of $25,000 or more must go through a competitive bid process or justify having a sole source.

A competitive bid will include any, or all, of the following:
- An assessment of the market and the supplier base
- A written scope of work and award criteria
- A Request for Proposal (RFP) or Quotation (RFQ) drafted and distributed to suppliers
- An analysis of vendor responses to the RFP/Q.

See bu.edu/policies/competition-and-supplier-selection-for-products-and-services-policy/ for more information.

Non-competition Policy

All purchases that exceed $10,000 for sponsored research and $25,000 for all funding sources not obtained using the competitive bid process require the shopper to provide Sourcing and Procurement with a justification for non-competition. The Sole Source Justification form should be used when the selection of a supplier for the purchase of products and services cannot be achieved through a competitive process.

Helpful Links

Contracts
Competition and Supplier Selection Policy
Sole Source Justification Form
Independent Contractor vs. Employee Status for External Service Providers - Guidelines

e. Internal Service Requests (ISR)

An Internal Service Request (ISR) is used by departments to request goods or services from other Boston University departments.

Internal services include:

- University-owned service providers (e.g., Publications Production)
- Contracted suppliers located on campus (e.g., Dining Services/Aramark)
- SPH-BEDAC
- Dining – Catering on the Charles
- Marking & Communications – Design/Print Communications and BU Productions (Video Production)
- CFA School of Music
- BUMC Public Safety Services
- BUMC Parking Courtesy Coupons
- Kelly Services (temp workers)

Procedure

- Contact the provider to obtain pricing and delivery information for the specific goods or services to be provided
- Create an Internal Service Request with the above information and any special instructions included
- After the delivery of goods or services, a service provider will charge the requesting department directly via BUworks Central

Helpful Links

Internal Service Request (ISR) Provider List with Email Contact and GL Recovery CO

f. Facilities Service Requests (FSR)

A Facilities Service Request (FSR) is used by departments to request services from the Facilities Management and Planning department at Boston University.

Facility Services include renovation requests, event set-up, classroom supplies and services, snow removal, security systems, telephone and data network services, parking, and towing.

There are three scenarios in which a user may need to request services from Facilities:

- Routine maintenance: e.g., replacing light bulbs, unclogging plumbing, repairing broken windows, etc.
- Non-routine maintenance: e.g., moving furniture, event set-ups, changing locks, and renovations
- Emergencies: fire, flood, power outage, roof or ceiling leak, too hot/too cold indoors, toilet stopped/overflowing, broken lock/lock-out, broken window or door, bodily fluids, chemical spills

To request services for your department, contact SPH Facilities and Building Operations at sphfacilities@bu.edu.

g. Disbursement Requests

A disbursement request is a formal request to pay vendors and individuals for goods and services that do not require a Boston University purchase order

Typical Disbursement Requests include payment for:

- non-employee prizes and awards
- dues, fees, licenses, permits, and premiums
- rents and leases
- royalties
- honorarium
- entertainers
- subject payments
- event
- utilities
- stipend
- donations

Disbursement request forms are available on the Accounts Payable website. Payment documentation (e.g., invoice, course syllabus, flyer, performance contract) must be included, as well as vendor documentation (e.g., W-9, W-8, etc.).

Note: All disbursement requests must include an invoice number and supporting documentation for the payment. If supporting documentation does not have an invoice number, please use this chart to create one.

Helpful Links

Disbursement Request Form
Disbursements – Create an Invoice Number
Boston University Accounts Payable

5. Student Payroll

a. Student Employment

Student Employment allows for students to gain professional experience, supplement their income, and provides support to SPH's operations. Doctoral, masters, and undergraduate students may be hired for positions based on specific criteria and regulations. Limitations for student employment include the number of hours a student can work, the registration status of a student, and may include restrictions based on the student's funding or institutional support. The School of Public Health depends on student employees to fill a variety of roles. The hiring process for student employment positions depends on the position and will be described in the following section.

Common student employment positions include:

- Teaching assistant/ co-instructor– assists instructor with all aspects of course management
- Tutor and peer coache – provides academic peer-to-peer student support
- Research assistant – assists faculty member with aspects of research
- Graduate research assistant – Ph.D. students who carry out research, normally as part of pre-doctoral training
- Office assistant – assists staff with daily responsibilities for a department, unit, or center

Student employment is processed through the Boston University Student Employment Office (SEO).

Work hours

The Office of the Provost guides the number of hours students can work based on their registered designation, as follows:

i. All full-time students may work no more than 1,500 hours in University employment during a fiscal year.
ii. Undergraduate and all part-time students should not work more than 20 hours per week while attending classes and should not work more than 40 hours per week during official University break periods, such as Intersessions, spring break, and summer.
iii. Full-time graduate students should not work more than 20 hours per week during any academic period and not more than 40 hours per week during official University break periods or during an academic period in which a student is not classified as full-time.
iv. Faculty and staff cannot be paid as student employees.

International students must adhere to limitations and requirements based on immigration status and authorization from the International Students and Scholars Office (ISSO).

Budget Considerations

The hiring and paying of student employees have structural and budgeting cost implications. As you consider the appropriate hiring needs, you will also need to determine the resources available to hire student employees and evaluate the hiring impact on your budgets.

The expectation is that all units should identify their needs and budget appropriately *before* hiring student employees. If there is a need to hire additional student employees, the first step is to discuss the matter with your department director and chair, establish a funding source for the position, and ensure that there are sufficient funds available to support a student employee.

Note: A fully approved requisition is required *before* any student employee is authorized to begin work, and it is the budget administrator's responsibility to ensure that there are adequate funds in the proper accounts to pay student wages.

The hiring procedures in this document assume that approvals have been granted and that funds are available for paying student employees.

Helpful Links

BU Policy on Student Work Hours

b. Hiring Forms

Before hiring a student for employment, all necessary paperwork must be completed to ensure eligibility and compliance. Students must complete federal forms I-9 and W-4, as well as the University's FERPA, student confidentiality, and intellectual property agreements.

The I-9

The I-9 form verifies the identity and eligibility of an employee. Students who have never worked at Boston University need to complete the electronic I-9 form. A supervisor or payroll coordinator can verify if a student has completed the I-9 as follows

- Enter the student's UID and current semester and year in the Student Employee Information section of the Business Link.
- If the student record appears, the I-9 is on file at the identified I-9 mail code.
- If the I-9 mail code is PRBI9 or an error message "not found on the Student Employment file" appears, the student needs to complete an I-9.

The I-9 form must be completed before or on the first day of employment. The form contains two sections that are completed using the University's I-9 electronic system. Student employee I-9s, for both domestic and international students, are completed with the hiring department. Each academic department has an authorized staff member to process student I-9s, and there are several authorized staff within BUSPH central administration to process student I-9s for central SPH units. For any questions or concerns related to student I-9 system access, please contact the Director of People Services.

Helpful Links

BU Student Employee Form I-9 Portal
Instructions for Completing the Student Employee Form I-9
Key Points for Completing Form I-9

The W-4

The W-4 and M-4 forms mandate how much in taxes Payroll should be withholding from each paycheck. While not required, each student has different financial circumstances that can be reflected in the W-4. Please note that if a student does not submit a W-4 reflecting their circumstances, the University will default to withholding the maximum amount at their income bracket: single with zero dependencies.

Depending on a student's eligibility, they may be exempt from a number of taxes.

Domestic students working on-campus positions are able to update their federal (W-4) and state (M-4, specifically Massachusetts) tax withholding certificates through Employee Self-Service in the BUworks Central Portal.

International students working on-campus positions should follow the International Taxation Set-Up process.

Note from the Student Employment Office: Do not give students tax advice or tell them how to complete the W-4 or M-4 form.. If students have questions about what to claim, suggest they talk to their parents or guardian or seek out tax information from a professional. Free tax help options can be found here under Student Payroll.

Helpful Links

Student Employment Office: Tax Information and Procedures
Student Employment Office: Tax Information for International Students

Additional Forms

The following forms should be completed by the student employee and stored within the hiring department. Boston University Student Employment Office does not require a copy of these forms.

- FERPA (Family Educational Rights and Privacy Act) – All student employees must review and sign the FERPA Non-Disclosure Agreement. FERPA is a federal law that guarantees the confidentiality of student records and general information.
- Confidentiality Policy – All student employees must review and sign the University's Student Employment Confidentiality Policy. Students must agree to respect the confidentiality of work-related and student record information outlined in the policy.
- IPP (Intellectual Property Policy) – Any student involved in University-supported research must-read Boston University's intellectual property policy and sign the agreement form.

Helpful Links

FERPA

Confidentiality Policy
Intellectual Property Policy
Student Employment – Required Paperwork

c. Hiring Procedures

All student employee hires are processed through the Student Employment section of the Business Link. This section provides a brief description of the most common student employment jobs at SPH, as well as guidance on how to process a hire for each job.

Helpful Links
- Hiring Departmentally-Paid Students
- Hiring Work-Study Students

Tutors and Peer Coaches

The Office of Graduate Student Life (GSL) at SPH offers free peer tutoring and coaching to MPH program students. The core course tutoring program is a free peer tutoring program for MPH students who are at risk of failing to meet the minimum grade required (B-) in the MPH core courses. Peer coaches assist MPH program students in strengthening their public health writing skills and presentation skills.

Graduate Student Life selects students eligible to work as tutors and peer coaches, and SPH Finance processes all tutor and peer coach hires in the Business Link.

Research Assistants

Research Assistants engage in research activities with a faculty member and are hired within the faculty member's department. Non-PhD students are eligible to serve as research assistants. Part-time student research assistants are hired by the department through the Student Employment Office and process and some of these positions may meet the criteria for student practicums. For more information contact sphpract@bu.edu. Full-time permanent research assistant positions are approved, posted, and hired through the regular staff hiring process described in Section VI. Hiring and Managing a Team.

Faculty members should identify their needs and budget appropriately before hiring a student research assistant. Department Administrators in the department where the faculty member resides are responsible for hiring research assistants.

Note: Research Assistants should be paid with funds from a grant or discretionary account and not from the department's unrestricted account.

Graduate Research Assistants

Graduate Research Assistants or Fellows (GRAs/GRFs) are doctoral students engaging in research activities with a faculty member that is a critical part of their pre-doctoral training. These payments are considered service stipends, and students receive a fixed salary amount each week. Funding for graduate research assistants can come from research grants, such as R01, but not T-32 grants. Department Administrators are responsible for hiring GRAs for academic departments. Please note that only service stipend payments are processed through Student Employment (not stipend tuition, health insurance, or fees).

GRAs work 20 hours per week and may not work any other student employment jobs, with the exception that they may work as a teaching assistant once per year. Please note that international students may not work more than 20 hours per week during academic periods, per University policy.

Office Assistants

Office Assistants provide administrative support to central and academic departments. Department Administrators should identify their needs and budget appropriately before hiring a student office assistant. Department or Unit Administrators are responsible for hiring office assistants for their departments.

Work-Study Jobs

Students may receive a federal work-study award as part of their financial package from Boston University. Not all students receive work-study awards, and only students with work-study awards may be hired to work-study jobs. If you would like to hire a student who does *not* have a work-study award, you must choose to hire type "departmental."

Boston University departments that hire work-study students incur a charge of 30% of those students' earnings and the federal work-study program funds the remaining 70%. Students who receive work-study awards are only paid for hours worked and are not obligated to earn their entire award.

If a student's work-study award runs out before they have finished working for the semester, you may opt to hire them to a new departmental job to continue paying them. Once work-study funds are exhausted for the semester, the department will fully fund the student.

The process for paying a student with a work-study award differs from departmental student hiring. Before the student can be hired, a work-study job number must be issued by the Student Employment Office. This number is unique to your department and is based on your unit/dept codes, job title, and supervisor. Department or Unit Administrators are responsible for hiring office assistants for their departments.

Helpful Links

Student Employment – Posting a Work-Study Job

Changes and Corrections

Occasionally, changes must be made to a student's job during the semester, such as a change to pay rate, a change in the estimated number of hours worked, or a change to a student employee's salary distribution. Department Administrators can make these types of changes in the Student Employment section of the Business Link.

Helpful Links

- Student Employment Pay Rate Change Instructions
- Student Employment Estimated Hours Change Instructions
- Student Salary Distribution changes (current week)
- Student Salary Distribution Adjustment Request Form (retroactive changes)

d. Hourly Timesheets

Hourly paid students must submit a timesheet each week to be paid. Timesheets are submitted online via the Employee Time Entry function under the Work tab in the Student Link. A student may enter their hours for a given week from 12:01 am on Monday through 11:59 pm on Sunday to be paid the following Friday. If a student forgets to enter hours during this time, their supervisor or payroll coordinator may enter the hours on the student's behalf up until 10 am on Tuesday. Only hourly students complete timesheets; weekly-salaried student employees do not need to complete timesheets. Students should consult with their immediate supervisor or department administrator to clarify whether they are hourly paid or weekly-salaried employees.

Helpful Links

- Student Time Entry Process

Manager Approval of Student Timesheets

Managers are required to review and approve student employee timesheets every week through the Supervisor Approval of Student Time Entry function, accessible through both the Business Link and the Faculty Link. Managers must approve student employee timesheets by 10 am on Tuesday for the student employee to be paid on Friday.

Helpful Links

- Supervisor Approval of Student Time Entry – Business Link
- Supervisor Approval of Student Time Entry – Faculty Link

e. Getting Paid

All student employees are eligible to be paid weekly, regardless of whether their job is hourly paid, weekly-salaried, or a one-time payment. Hourly and weekly-salaried student employees are paid every Friday. One-time payments are made on the Friday following the week worked.

Student employees are encouraged to set up a direct deposit account for their paycheck. This can be done by accessing Employee Self-Service (ESS) through BUWorks. Once students have set up a direct deposit, they will be able to view their salary statements online. On their designated payday, student employees will receive an email providing notification that they have been paid.

New student employees can set up direct deposit once their record has been established in SAP. This will typically be on Thursday after the student has been hired into the Student Payroll system and often means that the student's first payment will be issued as a paper check (domestic students' checks will be mailed to their home address and international students' checks will be mailed to their local address). Please note that a student is required to have a Social Security Number to set up a direct deposit.

Should there be a discrepancy with a student employee's paycheck, please contact the department administrator.

Helpful Links

- BUworks
- Student Employment – How to Set Up Direct Deposit
- ISSO – Applying for a Social Security Number

6. Support for Doctoral Students

The School has developed a comprehensive guide on doctoral student support which details:

- Processing Stipends
    - Pre-doctoral training grant support ("T32" grants) – Processed as Non-Service Stipends
    - Research grant support (GRA/GRF) – Processed as Service Stipends
- Processing Tuition, Fees, and Health Insurance
- Processing Corrections for Stipends, Tuition, Fees, and Health Insurance Payments
- Instructions for Completing the Fund Data Number and Non-Service Stipend Request Form

For the most recent annual stipend rates and process, please contact sphfin@bu.edu.

7. Faculty Compensation Changes

Faculty compensation may change for a variety of reasons, including faculty desire to change overall effort at the school, changes to funding, or medial or personal leave. These changes may have implications to a faculty member's benefits and to department or curriculum management. The Faculty Compensation Change Form aims to bring transparency to the compensation change process and requires a signature from the faculty member, department, and central administration.

Compensation Change Forms are required each time a faculty member changes their overall effort as well as when they have changes to their school-funded effort.

To the extent possible, faculty should try to limit changes to their overall compensation to no more than once per month.

Related policies:

- Faculty Phased Retirement Program

8. Processing Revenue

Information in this section of the handbook guides how to record operating revenue generated by our School properly. At SPH, the most common forms of revenue include tuition, gifts and contributions, contracts and grants, and auxiliary operations.

a. Gifts and Endowments

Boston University's Gifts Manual provides detailed information on Gifts and Endowments and has been summarized in this section of the Handbook. All SPH departments looking to record gifts and/or endowments to their accounts should reference this manual and work closely with SPH Development and Alumni Relations (DAR) to ensure proper accounting of this type of revenue.

Gifts are irrevocable transfers of assets, i.e., contributions from private sources for which no goods or services are expected, implied, or forthcoming in return to the donor, and in which no proprietary interests are to be retained by the donor.

Endowment funds are resources received by the University that help to provide a sustainable level of support for the University's operating budget. The donor gift or principal amount is invested in the University pooled endowment to provide both income and long-term growth. Individual endowment funds are comprised of a specific number of "units" or shares within the University endowment that generate annual income either for distribution use or to be returned to the principal.

Grants or Sponsored Activities are different from gifts, as the University undertakes them with the support of an external entity, which expects in return specific outcomes that either directly benefits the provider or a public purpose. At a minimum, the provider requires the University to report on how the funds were spent, and/or what progress has been made in accomplishing the goals of the activity.

The University's Gift or Sponsored Agreement webpage has some helpful tips for differentiating between these types of activities. The SPH Development and Alumni Relations team or idea hub can help to determine which type of agreement is necessary.

Restrictions for gifts and endowments

For more information on designating funds, see Boston University's Gift Policy Manual under "designating funds" for details on, fund types, endowment (or permanent) fund classifications, and others.

Procedures for gifts and endowments

Gifts and endowments accounts (also known as internal orders) follow a specific structure. Please follow the instructions for Procedures for Gifts and Endowments.

Note*:* Please make sure to involve SPH DAR in all matters about gifts and endowments.

b. Other Income Generating Activities

Income-generating revenue refers to fee-based services provided to external parties by departments or programs exclusive of grant-supported activities. The income generated by these activities may be coded to a fund center or internal order account. Please contact SPH Finance and Administration to ensure revenue is recorded in the appropriate account.

Examples of other income-generating activities:

- Population Health Exchange
- BEDAC

Helpful Links

Post-Award Financial Operations – Manage an Award
Sponsored Research – Award Closeout

c. Collecting Revenue Procedures

The University allows schools, departments, and programs two methods of collecting non-tuition based revenue. For information on collecting revenue procedures, see the How-to Collect Revenue tip sheet. This tip sheet includes information on the Cashier's Office and Cash Management/Miscellaneous Receivables.

Helpful Links

Depositing Checks and Cash for Medical Campus
Credit Card Processing
PCI Data Security Standards
Research Support – Manage an Award: Cash Management
Research Support – Miscellaneous Receivables
Create a New Customer - BUworks October 2017 Finance Newsletter
Entering Outgoing Invoices – BUworks Online Help

Restricted gifts and endowments

Department directors and administrators are responsible for spending and reconciling all gift and endowment accounts within the department's fund center every month. Departments should spend the funds in a timely and appropriate manner according to the donor's guidelines. Account administrators should ensure that new gifts are properly recorded and ensure posting accuracies and investigate any questions as they arise. The terms of all accepted restricted funds are kept on file in the Office of General Accounting in the Comptroller's Office. If a department is unclear about the restrictions for a gift or endowment account, please contact SPH Development and Alumni Relations.

Helpful Link

Gift and Endowment Fund Administrator Training

9. Year-End Close

Each fiscal year, Boston University is required to prepare consolidated financial statements per Generally Accepted Accounting Principles (GAAP).

These financial statements provide an overview of the University's activities for the fiscal year (July 1 through June 30) and reveal important information about the financial health of our Institution.

Accounting procedures are undertaken throughout the year to ensure that all transactions posted are accurate and recorded to the appropriate period to prepare financial statements. Year-end accounting procedures are similar to the processes you already perform on a daily, weekly, or monthly basis, but are particularly important during this period as they provide one last opportunity to record all your departmental activities and make any necessary corrections.

The School's Year-End Closing Guide details key dates, how to reconcile income and expenses, and responsibilities for managing the school's finances.

10. Faculty Salary Management

This section contains helpful information related to the management of salary cost distributions. For staff members it is usually very simple either the staff is school funded, or research funded. With faculty it can be much more complex due to varying situations:

- Bridging
- Recruitment
- Holding waiting for research account
- Over the NIH cap
- Sabbaticals and LOA

Please click this link to view a pdf which provides an overview of the faculty salary management and guidance for each of the situations listed above.

Related Policies
Faculty Compensation

XII. Facilities Management

1. Asset Management

Faculty and staff are provided suitable assets as part of the employment. Each new hire is assigned particular SPH owned assets to enable them to perform their core duties and responsibilities. Upon analysis of what is needed for each employee, assets are ordered from preferred vendors per Boston University Procurement regulations.

Hard assets such as office furniture, specialized equipment, computer hardware, and licensing (software) are different types of assets an employee may be issued. As older assets are decommissioned, and newer assets are acquired, the original equipment that has completed its life-cycle will be disposed of in an environmentally friendly manner. Older assets are reviewed for condition and performance and repurposed accordingly.

To request that an asset be purchased, please use the Asset Request form. This form prompts the user to answer questions that are required to create a purchase requisition, as well as to account for existing equipment. The completed form will be sent to the SPH Facilities Manager, and a copy will be sent to the user and respective supervisor for recordkeeping. Within 48 hours after a request has been submitted, a purchase requisition is created, and the order is placed. Depending on the funding source(s) and value of the purchase requisition, the ordering process, which includes proper approvals, may take a few business days to complete. Furniture assets typically take six to eight weeks to be delivered, whereas computer assets typically range between two to four weeks.

Upon termination of an employee's relationship with Boston University, any SPH property/assets assigned to that employee must be returned to SPH on the employee's last day of employment with the school. All computers purchased or reimbursed with SPH funds (including discretionary and grant funds) remain the property of SPH until properly disposed of through the BUMC IT recycle program. Computer assets do not become a gift or property of the current user at the termination of grants nor with the procurement of new assets.

a. Expenditure Operations Hierarchy

To promote equity in our purchasing decisions, and protect the school's financial resources, all asset purchases at SPH, follow the expenditure hierarchy below.

Requester	Comments	Electronic Devices*	Other Physical Assets*
New Faculty	This hierarchy refers to expenses incurred for a newly recruited primary faculty member during the initial contract period.	244XXX0020 – Recruitment 909XXXXXX2 – Faculty Discretionary 909XXXXXX1 – Chair Discretionary	2446390000 – SPH Plant Reserve** 244XXX0020 – Recruitment 909XXXXXX1 – Chair Discretionary
Existing Faculty	This hierarchy refers to expenses incurred at the request of an existing faculty member.	95XXXXXXXX – Grant*** 909XXXXXX2 – Faculty Discretionary 909XXXXXX1 – Chair Discretionary	2446390000 – SPH Plant Reserve** 909XXXXXX2 – Faculty Discretionary 909XXXXXX1 – Chair Discretionary
Staff/Students on central funding	This hierarchy assumes that the staff/student is working in central school or department functions.	244XXX0000 – Dept Operating	2446390000 – SPH Plant Reserve** 909XXXXXX1 – Chair Discretionary
Staff/Students on extramural funding	This hierarchy assumes that a staff/student is working on an extramurally funded project.	95XXXXXXXX – Grant 909XXXXXX2 – Faculty Discretionary 909XXXXXX1 – Chair Discretionary	2446390000 – SPH Plant Reserve** 909XXXXXX2 – Faculty Discretionary 909XXXXXX1 – Chair Discretionary

Notes:

*Electronic Devices Include Computers, Tablets, Docking Stations, Monitors, and Printers. Other Physical Assets Include: Furniture (desk, table, chairs, bookcase, filing cabinets, etc.), Carpet, and Paint

**The SPH Plant Reserve shall be billed only for physical assets with approval from the Dean or designee, provided that the request is in line with efforts to refresh all physical assets at SPH periodically. However, the table above also provides the hierarchy of accounts that should be used when it is not appropriate to charge the physical asset to the SPH Plant Reserve.

***It is understood that some departments have a history of charging computers centrally. Respecting that history, we anticipate that some departments may wish to budget computers on Chair Discretionary funds.

This hierarchy falls within the established finance guidelines for SPH vis-à-vis potential account deficits. Grant purchases are limited to project personnel and related expenses; grant accounts must be charged in accordance with award notices and established cost principles. Where relevant, 93XXXXXXXX – Gifts and 925XXXXXXX – use Endowment Spendable accounts for all as a priority. Gifts and spendable endowment funds may be used if appropriate based on donor specifications.

b. Purchasing a Computer at SPH

Information Services & Technology, in cooperation with Sourcing & Procurement, sponsors Boston University's PC and Apple Standards initiative. Standardization lowers the total cost of ownership through reduced support costs and encourages collaboration and efficiency between all BU IT support staff. By leveraging the buying power of the University, we also can receive significant cost savings for our purchases. BU's recommended vendors for all desktop and laptop purchases are Lenovo and Apple.

Key benefits of the Standards Initiative are:

- Cost savings through negotiated pricing on selected models
- Quality
- Sustainability
- Extended Warranty Support
- PC systems pre-installed with BU Software Image

Getting Started

- BU PC and Apple Standards are purchased through the Terrier Marketplace catalog in BUworks.
- For model information and pricing, visit Sourcing & Procurement Computer Standards
- IS&T supported departments are encouraged to consult with IS&T Desktop Services when selecting a computer. To contact IS&T Desktop Services, please email ithelp@bu.edu.
- Non-IS&T supported groups are encouraged to consult with your local IT support. For contact information, please use this directory of Other (Non-IS&T) Technical Support Resources

Recommended Refresh Cycle

Information Services and Technology (IS&T) recommends that University-owned computers be replaced on a regular cycle. Older machines in our environment increase our total cost of ownership as they become less supportable, less secure, and less sustainable than more current devices. For standard computing situations, IS&T recommends a refresh cycle that replaces laptops every four years and desktops every five years. IS&T has suggested that typical lifecycle for standard Lenovo/Apple laptops may be 1 to 2 years beyond the 4 year extended warranty, and desktops may be up to 2 to 3 years beyond the 4 year extended warranty.

Requirements

Participation in the standards initiative is required for administrative departments and highly recommended for academic units. Exceptions must be approved by vetting the business requirements for a non-standard purchase with either your Desktop Services Primary Responder or local IT Partner support staff.

The BU Standards Initiative was born out of the need to improve the procurement of desktop and laptop systems at the University. Prior to the Standards Initiative, the wide variety of computer models, many of which were consumer-grade equipment, caused confusion and reduced support efficiency. Additionally, BU was not receiving bulk pricing discounts from our vendors due to our lack of standardization. To this end, a committee was formed, consisting of IS&T staff and IT Partners from both the Charles River Campus and the Medical Campus. The goal was to select a single vendor for PC systems and to select systems that met the needs of the majority of University users.

Lenovo (ThinkCentre and ThinkPad) was selected as the University's PC standards vendor after a lengthy RFx process as well as testing of evaluation units by the IT Partners. While Apple is the only vendor for macOS and iOS systems, they, too, were carefully evaluated to select the best options for the University.

IS&T and Sourcing coordinate a PC Commodities Council that meets regularly to maintain and evaluate the University's standard configurations. The Council has representation from the Charles River Campus, the Medical Campus, IT Partners, and IS&T, as well as staff from Sourcing & Procurement.

BUSPH Computer Procurement Policy

After visiting the sourcing and procurement site, and deciding on a computer, the next step is to fill out the SPH Asset Management Request form (AMR). This form will collect the required information to build an Ariba Guided BUying purchase requisition, as well as update BUSPH asset inventory information.

Once the AMR form is completed and submitted, it is sent to SPH's manager of operations/facilities, to be processed. The requester also receives an email with a copy of the request. Typically, it takes less than 48 hours to create and submit a purchase requisition. Once the purchase requisition is submitted, it is viewed by the SPH finance team, and then the existing SAP approval process (departmental sign off) takes place. The Terrier Marketplace then submits the order to the vendor.

Both preferred vendors typically acknowledge a Terrier Marketplace order from BUSPH within 24 hours. Depending on the equipment selected and its availability, the product should be delivered within 2-4 weeks.

When the product(s) arrive, they are delivered to IS&T, and an IS&T ticket is created, using the original Asset Management Request form. This ticket is created with the asset requester email, as to continue communication between both parties. IS&T adds the new asset to the inventory system, tags the machine with a BUMC IT tag/ID number, and images the computer. Laptops undergo an additional process. They have encryption software installed to protect data should the laptop be stolen or lost. Now is when the requestor/end-user would request that existing or new software be installed on the new asset via their ticket. IS&T will need to have proof of ownership before they are allowed to install purchased software. The procurement of software is done with an ISR, which is a slightly different process.

When IS&T completes its tasks, it updates the ticket and coordinates a drop-off of the computer with the requestor/end-user. When this exchange happens, the requestor's old asset is usually collected to be recycled or re-imaged and redistributed to another SPH member. IS&T can also make sure that printers and monitors are correctly connected, and move data from old equipment to new equipment with delivery as well.

c. Ricoh Printers and Photocopiers

Multi-function printers (MFP) are procured using BU's pre-negotiated contract. These are typically purchased for locations by the department. One centrally-located copier/printer/scanner device may service 20-40 faculty/staff. SPH Central buys the RICOH equipment, and the latter is maintained for seven years via a customer service contract, paid by the department cost center requesting the equipment. Ricoh will bill a department's operations cost center quarterly for each machine's service contract and consumables. After seven years, Ricoh equipment may be replaced by SPH if the equipment is failing, or Ricoh maintenance is no longer applicable due to limited or discontinued parts. Currently, the purchase process is handled through an Asset Request form. Upon submission of the request, research is conducted by Ricoh, the requesting department, and the SPH Facilities Manager to determine the correct "sizing" of the equipment vis-à-vis departmental needs. Due to vendor limitations, the equipment will be purchased using the department's cost center. A reverse journal entry will be made after delivery to ensure SPH Central covers the initial cost of the machine. All other costs/fees associated with the device are maintained by the department's cost center for the ensuing seven years.

d. Routine Facilities Maintenance

Routine maintenance includes, but is not limited to, replacing lightbulbs, unclogging plumbing, and repairing broken windows or doors. The Control Center monitors all building automation systems and dispatches staff to respond to requests for routine maintenance assistance, including fire alarms, heating/cooling systems, and all other building and grounds issues on the BUMC campus. A Control Center technician is on duty 24 hours a day, seven days a week. Control Center can be reached at 617-358-4144. Please use the list below to determine the appropriate way to make a routine maintenance service request.

- Faculty and staff should call BUMC Control at 617-358-4144
- Students in BU housing should contact their resident assistant (RA) or residence hall director.
- Rental Tenants should contact BU Real Estate.

e. Non-Routine Facilities Maintenance

Non-routine maintenance includes moving furniture, event set-up, changing locks, renovations, and construction. The costs of these services are typically the responsibility of the department making the request. Please use the list below to determine the appropriate manner for making non-routine maintenance service requests.

- Faculty and staff should contact their department's administrator to submit a Facilities Service Request (FSR) in CAMMS if authorized to make non-routine maintenance requests on behalf of the department. To set up a new account in CAMMS or discuss maintenance requests, please contact the SPH Facilities Manager at sphfacilities@bu.edu.
- Rental Tenants should contact BU Real Estate.

f. Other Maintenance

Maintenance that does not involve BU Facilities such as installing a new Ethernet drop from IS&T Network Services or activating a phone line from IS&T Communication Services should be completed via an Internal Service Request (ISR). ISRs should also be used for purchasing software from IS&T or purchasing parking passes. See Section X.4 Purchasing for how to submit an ISR.

2. Principles Guiding Use of Space at SPH

The Boston University School of Public Health is primarily based in the Talbot and Crosstown Buildings, with additional space on the 9th floor of the Fuller Building and 4th floor of the R Building (BUSM). We are continuously evaluating the space we have available, balancing our space needs with costs involved in managing our space. To the end of ensuring that all our space decisions are consistent with our values as a school, the following principles guide decisions we make around space.

1. Space is a public good; no single unit owns space and we should be nimble and flexible enough to accommodate shifts and growths in particular areas of the school.
2. All space decisions, in all units, need to be reviewed by the Dean's Office before being implemented to ensure consistency with agreed-upon principles. All space-related requests should be directed to the SPH Associate Dean for Administration and Finance who will assess the implications and confer with the Dean.
3. Faculty and director-level staff (central or departmental) operating on premises at least 3 days a week should have individual offices.
4. Non-director level staff (central or departmental) and faculty operating on premises less than 3 days a week, or who do not need a private office to carry out the core duties and responsibilities of their roles should have access to appropriate shared space. Faculty who do not regularly work on campus three days a week or more will need to share an office or utilize shared space as assigned by the department's director of administration or chair.
5. Individual offices or relevant private conversation space will be made available for staff or faculty who regularly engage in conversations that would benefit from privacy.
6. If full-time doctoral students or research staff have space, it should be in the form of a cubicle or workstation in shared offices that are optimally configured for this purpose.
7. Insofar as possible, we will preserve the contiguity of research groups to enhance collaboration.
8. All conference rooms should be open to the school community for scheduling via a central system. While we should have sufficient conference rooms for our needs, we want to make sure that we do not have redundant conference room space to ensure sufficient office and workspace.

Space Assignment

The Associate Dean for Administration and Finance assigns overall office space to departments. Individual assignments of personnel to particular offices/cubicles are managed by departmental chairs/unit heads and directors of administration. The Associate Dean for Administration and Finance, as well as Occupational Health and Human Resources may be consulted for recommendations as needed.

Access

Access is authorized by each department adhering to campus safety guidelines as well as Campus Planning and Operations protocols and procedures.

Operations & Maintenance

- Ongoing Operations & Maintenance are funded by central budget resources and will include standard general office infrastructure repairs, maintenance painting, cleaning, except when the Department has applied non-standard office furniture, finishes, fixtures or equipment with no prior approval from the Associate Dean for Administration.
- Office spaces are initially outfitted with a standard set of furniture funded centrally by the School. Changes or upgrades to the standard set of furniture due to PI preference is the responsibility of the PI and as such must be funded accordingly by that PI's discretionary account.
- Each department is responsible for funding of approved equipment, supplies, etc., that are not identified as a larger School project or expense, yet are a preference of the requesting department. Whenever such preferences apply to a specific PI, the latter bears the costs through their discretionary account.

Costs

- All costs associated with setting up a standard office with standard equipment/furniture (as highlighted in the description of single occupancy/shared occupancy office section below) for a new faculty/staff are borne by the School.
- All costs associated with additional (by choice) equipment and furniture beyond the standard (described below) are borne by the individual requesting PI through their discretionary account.

Inventory

Space inventory is maintained by the Director of Facilities and Building Operations utilizing the Physical Planning & Space Management system. Requests for space inventory information can be made by contacting mkoehler@bu.edu.

Single-Occupant Faculty/Staff Offices

All single-occupant Faculty/Staff Offices contain:

- Desk, with drawer storage or small file cabinet
- Task Chair
- Landline phone
- Computing equipment

Items that may also be included are:

- File Cabinet Storage
- Wall shelving or bookcases
- Meeting table and seating (optional, and based on office size)

Any faculty/staff seeking to bring into the office other furniture items beyond the above, even if at no cost to the School, must receive approval from the Associate Dean for Administration or Finance in order to do so in order to remain in compliance with fire codes and other legal requirements. The request for approval may be sent via e-mail with a succinct business rationale substantiating the need to bring such other furniture into the office.

Shared Faculty/Staff Offices

All shared Faculty/Staff Offices contain for each personnel:
- Desk with personal storage
- Chair

Shared resources may include:
- File Cabinet Storage
- Wall shelving or bookcases
- Land line phone for each occupant
- Computing equipment

Items that may also be included:
- Meeting table and seating is optional, and based on office size.

Any faculty/staff seeking to bring into the office other furniture items beyond the above, even if at no cost to the School, must receive approval from the Associate Dean for Administration or Finance in order to do so in order to remain in compliance with fire codes and other legal requirements. The request for approval may be sent via e-mail with a succinct business rationale substantiating the need to bring such other furniture into the office.

Protocol to outfit offices:

- When possible, vacant offices may necessitate being properly outfitted as highlighted above to accommodate new faculty/staff.
- Departmental Directors of Administration in collaboration with Departmental Chairs determine which offices to assign to new faculty/staff, whether to displace existing occupants based on actual office usage etc.
- Whenever displacement of a current occupant is necessary, it is the responsibility of the department's Director of Administration to coordinate accordingly with the Director of Facilities and Building Operations so that pre-existing items are appropriately removed or disposed of. Furniture may not be placed outside of an office setting, as it may potentially cause entry or egress blocking or other fire code/legal violations. The Director of Administration works with the Facilities Director to create an FSR so that items may be removed or disposed of.
- Items such as books, office supplies and personal effects should be removed and appropriately disposed of by the existing occupant of the office being vacated. In order to minimize the burden, it is highly recommended that only necessary, work-related items be kept in any occupied office. Personal effects within an office setting should be kept to a minimum.
- Assembly and dissembling of furniture necessitate an FSR creation by the department's Director of Administration upon communication with the Director of Facilities and Building Operations. If items need to be relocated, the FSR should include the new location where the items are to be placed and/or assembled. Union custodians are assigned to service each FSR. Should a request entail moving items that are significantly larger than usual, typically a

team of four custodians for a four-hour shift is assigned, commensurate with provisions of the collective bargaining agreement (CBA) which custodians are members of.

- Whenever existing furniture becomes damaged beyond appropriate use, new furniture replacement becomes necessary. In such cases, the Director of Administration works closely with the SPH Director of Facilities and Building Operations in order to engage a BUMC designer in selecting furniture approved by Kimball lines. FSR creation in order to request a new furniture must thus be submitted by the Director of Administration in collaboration with the Director of Facilities and Building Operations. It is likely that a designer as well as a sales representative/consultant would then further engage with the Director of Administration of the respective department in order to measure the impacted space and size up the necessary furniture.
- Additionally, furniture may be selected from the BU Guide marketplace. Generally, WB Mason is the general material provider. Each selection made must be shared by the departmental Director of Administration with the Director of Facilities and Building Operations. While WB Mason provides shipping, assembly is not always guaranteed. Further, some items may not require assembly. For instance, desks that are 48" or less are shipped by WB Mason in a flat box, while larger desks arrive assembled. An FSR must be submitted by the Director of Administration, upon consultation with the Director of Facilities and Building Operations to ensure appropriate assembly for any furniture arriving in a box (i.e. unassembled).
- Regardless of vendor, there are limitations to what can be purchased, adhering to considerations such as a commercial building/application, fire rating certifications as well as durability rigor. To that end, the Director of Administration must render the SPH Director of Facilities and Business Operations aware of any non-BU approved vendors/designers (e.g. purchasing items from HomeGoods or Pier One, etc.).

Questions

Any questions or concerns not addressed through the information provided in the sections above may be directed to the SPH Director of Facilities and Building Operations or to the Associate Dean for Administration and Finance.

3. Conference Room Reservations and Space Requests

Conference Room Reservations

All SPH conference rooms are available for use by any SPH member through the 25Live software. All booking requests must be scheduled through 25Live. 25Live is a room scheduling software provided by BU. Trainings are held periodically, and anyone needing to book SPH conference rooms must have their default 25Live profile updated to do so. A request may be sent to the SPH Facilities Manager via email to sphfacilities@bu.edu. The Facilities Manager will work with EdMedia to administer the SPH Conference Room. Any SPH employee who becomes an SPH Conference Room "delegate," may modify SPH Conference Room bookings created by them only. No outside, non-SPH booking modifications are allowed.

Space Requests outside of SPH

Requests for class-related activities are made by the SPH Registrar.

Space for non-academic events and functions on the Medical Campus can be made by contacting Educational Media.

Space for non-academic events and functions on the Charles River Campus can be made by contacting Events and Conferences.

4. Hybrid Meetings

In order to allow meeting participation from all members of the SPH community, including those in the office and those approved to work remotely, SPH meetings are offered in a hybrid format. The school has OWL devices that allow for both video and audio in conference rooms.

Please see the Guide for Hybrid Meetings for more information.

XIII. Policy Regarding Visitors at SPH

This policy governs BU School of Public Health visitors.

A **Visitor** is defined as any individual entering BU SPH premises who is not an employee (faculty or staff) or a currently enrolled student. Vendors, construction contractors, volunteers, and other groups listed below are considered Visitors.

A **Host** is defined as the University office/department, employee, or registered student requiring or inviting a Visitor to come to campus.

This policy applies to all Visitors to property owned or leased by BU SPH, excluding Visitors to off-campus residences. This policy is intended to supplement any federal, state, and local health and safety regulations with which BU SPH must comply.

Visitors engaged in official business

BU SPH spaces, facilities, and buildings are open for official business.

The following categories of Visitors are permitted on BUSPH premises pursuant to previous arrangements with the Associate Dean for Administration, Director of Facilities and Building Operations, or their designees (who in turn must inform the front desk and relevant stakeholders of the impending visitor/work being conducted on premises).

- Construction contractors
- Vendors and Suppliers of goods and services to be delivered to or performed on campus
- Visiting Faculty and Research Scholars
- Visiting students Invited Pursuant to University Policy
- Invited speakers or hired performers or artists
- Other visitors, on official school business, as approved by the Dean and/or the Dean's designee

Visits by Family and Friends

Personal visitors, including family members and friends of students or employees may visit SPH premises/buildings upon providing advance notice. Visitors will need to sign in at the front desk and be met at the Talbot lobby/department front desk at Crosstown by the SPH employee/student hosting the visitor. Visitors will need to be accompanied at all times by their host while on SPH premises. Visitor information must be provided to the front desk and the relevant department administrator as soon as practicable. Notification can be provided via email.

Prospective students

Prospective students may visit BUSPH and must work with the Admissions Office to set appointments prior to visiting so that BUSPH may ensure a rewarding visiting experience for all prospective students and their families. While visiting BUSPH premises, all prospective students must comply with the safety protocols and guidelines established by Boston University and the School of Public Health.

Requirements for Visitors

All Visitors permitted on campus will be required to follow health and safety protocols adopted by the University.

Requirements for BU SPH Hosts

When a Host invites a Visitor to Boston University property, whereby they **plan to meet on premises** (rather than **host already escorting visitor into** the premises) the following requirements apply:

- Hosts of visitors are required to notify the relevant lead department administrator
- If any visitors do not comply with BU SPH safety protocols and guidelines, they will be asked to leave campus immediately.
- Hosts are responsible for informing visitors of safety protocols and for collecting the necessary contact information – names and phone numbers – of all visitors. In the event that a host submits multiple visitor requests, it is the host's responsibility to maintain a comprehensive list of visitors with contact information and visit dates. Names and contact information of all visitors must be provided to relevant department administrator as soon as practicable.

Exception Requests

Requests for access to campus by other Visitors not described in this policy will be considered on a case-by-case basis and should be submitted to the Associate Dean for Administration or Building Coordinator who will advance the request to the Associate Dean for Administration for approval.