MEMORANDUM

TO: Mānoa Deans and Directors
    Mānoa Fiscal Administrators

FROM: Kathy Cutshaw  
      Vice Chancellor for Administration, Finance, and Operations

SUBJECT: 2013 Annual Update of Organizational Charts and Functional Statements

June 5, 2013

Per attached memo from the University Budget Office (UBO) dated May 31, 2013, please prepare and update your organizational charts and functional statements effective July 1, 2013. In our ongoing effort to operate in a sustainable manner, please submit original electronic files (Visio, Excel, Word, etc.) to ovcafo@hawaii.edu by Monday, July 1, 2013 for internal review to meet the July 26, 2013 UBO deadline.

Please ensure the total FTE count is reflected on each chart and the grand total FTE count of all charts is on the first chart. Complete and attach the two (2) supporting documents, the Mānoa FTE Summary Form and the Mānoa Update Form to your electronic submission. For easy reference, information and samples on format and forms are available on the Mānoa Policies, Procedures, and Guidelines (PPG) website under M3.102 Annual Updates: http://manoa.hawaii.edu/policies/m3.000organization/index.html.

Please feel free to contact my office at 956-5658 should there be any questions or assistance needed. Thank you.

c: Tom Apple, Chancellor
    Mānoa Vice Chancellors
May 31, 2013

MEMORANDUM

TO: Vice President for Community Colleges
Chancellors (Mānoa, Hilo, West O‘ahu)
Systemwide Administrative Affairs
State Director for Career and Technical Education

FROM: Laurel Johnston
Director of Budget

SUBJECT: 2013 ANNUAL UPDATE OF ORGANIZATIONAL CHARTS AND FUNCTIONAL STATEMENTS

In anticipation of the Governor’s request for an annual update of the University’s organizational charts and functional statements, we are requesting that you submit your updated charts and functional statements to the University Budget Office. Please send a copy on compact disc (cd) or one electronic copy via UH File Drop, to emleong@hawaii.edu, no later than Friday, July 26, 2013. Submission of hard copies is not required. Our office is located at Administrative Services Building One, Room 101.

A worksheet should be completed in accordance with the attached sample to explain and report all changes that are incorporated into the 2013 annual update. If there are no changes in your organizational charts and functional statements, please check the box at the bottom of the worksheet. Please send a copy in conjunction with your updated charts and functional statements on the cd or via the File Drop method.

In accordance with revised Administrative Procedure No. A3.101.10 (March 2008), each submitting executive is responsible for the accuracy of their annual update, which should include the following information and changes:
1. All permanent and temporary full-time equivalent (FTE) budgeted positions supported with appropriated funds as of July 1, 2013;

Position counts reflected on the organizational charts cannot exceed your appropriated position allocations. The funding source for all positions, both general and non-general funds should be reflected, i.e., (A), (B), (W), or (N), and position count totals by funding source should be provided on the bottom of each organizational chart, e.g., A= 20.00, B= 2.00. For less than full-time positions, the FTE should be shown, e.g., 8XXXX(.50). Please refer to Exhibit A or B.

NOTE: "Appropriated funds" means general (A), special (B), revolving (W) or federal (N) funds that are appropriated by the state legislature in the annual state budget act.

2. New permanent positions established as of July 1, 2013;

NOTE: For permanent positions appropriated in FY 2013-14 that are not yet established as of July 1, 2013, include a "Pending Establishment" footnote at the bottom of the organizational chart and list the positions by pseudo number and position title (without salary level) in the footnote.

3. Approved changes in position classification titles and FTEs;

NOTE: Executive and Managerial position classification or salary levels (pricing designations), e.g., M-11 should be deleted from organizational charts. For example, a Director's position should be shown as Director 8XXXX.

Administrative, Technical and Professional positions should be reflected with their functional code titles. For example, an Administrative Officer's position would be shown as Administrative Officer, PBB 8XXXX.

Please do not use broadband position titles, working titles, nor UH prefix. Position classifications for coaches, however, are not affected by this requirement.

4. Reorganizations officially approved as of July 1, 2013;

5. Approved changes in titles of organizational units; and

6. Minor corrections or adjustments made to functional statements that do not require the approval of reorganization or affect the classification or organizational location of a position.
As a reminder, please note the following:

1. All charts and functional statements should be prepared to be printable on 8-1/2" x 14" white paper.

2. All supervisor/subordinate reporting relationships should be accurately reflected using the method depicted in either Exhibit A or Exhibit B (see attached).

3. If a position has been transferred between organizational units, a signed and dated position organizational chart reflecting the transfer should be submitted for each chart affected, i.e., the organizational unit receiving the position and the organizational unit giving up the position. This applies only to situations where no change in supervisory levels or organizational functions is involved and the approval of reorganization is not required.

4. Generally, only solid lines should be used to draw and connect blocks.

5. Chart update stamps from prior annual updates and chart approval signatures and dates from previous fiscal years should be deleted from charts submitted for this annual update.

6. Organizational charts and functional statements should include a heading to identify the organizational location of an organizational unit. See Exhibit A, (upper right corner) for an organizational chart heading sample, and Exhibit C for a functional statement heading sample.

If there are any questions regarding this matter, please contact Ed Leong at 956-8472.

Attachments

c: Russell Chun, ORS
   Kathleen Cutshaw, UHM
   Claire Shigeoka, UHH
   Joyce Clapp, SDCTE
   Nancy Nakasone, UHWO
   Mike Unebasami, CC
   Scott Yamashita, ITS
   Lance Yamamoto, CC/Budget