Present from College of Mathematical and Physical Sciences
   Chemistry: David Hart, Graduate Studies Chair; Judy Brown, Graduate Studies Coordinator; Ming Zhu, graduate student
   Geological Sciences: David Elliot, Graduate Studies Chair; Angie Rogers, Graduate Studies Assistant
   MAPS: Marcie Nabor, Administrative Manager of Human Resources

Present from Office of Student Affairs
   Tina Love, Human Resources Director

Present from Steering Committee
   Council of Graduate Students: Barb Pletz, Briggs Cormier, Jane Evans
   Graduate School: Susan Huntington, Lamar Murphy
   Office of Human Resources: Larry Lewellen

1. Overview of pilot program. Implementing an improved, standardized GA appointment process was a key recommendation of the G-QUE study. A project to design an improved process has been underway for the past year, receiving very broad campus feedback and involvement. We are now making final preparations for university-wide implementation for 2005-06. The College of Mathematical and Physical Sciences and Office of Student Affairs agreed to participate in a pilot program to test and refine the appointment documents and process.

   Initial feedback from the pilot units was sought between December 2004 and early February 2005. All of the feedback was compiled and distributed in February to pilot units along with revised GA appointment documents for the units’ additional review and feedback. The February 21 meeting was the first of two meetings scheduled with the steering committee to gather additional feedback and suggestions for improvement. (The second meeting was later cancelled, since most unit representatives attended this one.)

2. Issues for discussion. A number of issues were highlighted for discussion, as listed below with comments from meeting participants:
   a. How will this be implemented electronically? Do any of the pilot units currently have a set of best practices for electronic dissemination and management of these kinds of documents? It is assumed that the process will at some point be linked with the human resources and/or student databases to facilitate document production.

   No best practices for electronic dissemination were shared, although the Chemistry representatives suggested that we consult with the department’s HR person, Lynne Barnett, who was unable to attend the meeting.
There was agreement that the appointment form must be able to be generated electronically and that it ultimately would be desirable to have it tied to the OHR database.

There will be some units (like Geological Sciences) that will want to continue to use paper documents.

Description of current processes

**Chemistry** (about 250 students supported, of whom about 40 are from outside Chemistry)

- **New students**: Offer letters go out to prospective students each spring. Students are promised support for five years as GRA, GTA, Fellow, or GAA. Once student accepts, the five years of funding is a given but is not part of the formal appointment process.

- **Continuing students**: Grad office asks faculty each spring to project support for the following year. Grad office starts on paperwork around July for autumn. Some appointments are for 12 months. Many students switch appointments during the course of a year; when this happens, changes are made in the OHR system.

- **Note about GRAs**: Need to differentiate in document between expectations for GRA working on research unrelated to dissertation and the person who is working on research related to his or her dissertation.

**Geological Sciences** (about 50 students, with half on GTA appointments and half on GRA appointments)

- **New students**: Process works in a manner similar to that for Chemistry. Master’s students are promised two years of funding and doctoral students are promised four. Specific funding type not initially specified, and many change.

- **Continuing students**: Must sign a form before the next year. Stipend and specific duties can change.

Both departments send incoming student information about TA training and other requirements in the spring or as soon as available.

**Student Affairs** (all GAA)

- Most are two-year appointments as part of Student Personnel Administration degree program
- Some are one-year appointments and a few are three years

b. There is interest in a much shorter appointment document, with much of the standard information available on a Web site. How might this most easily be accommodated?

*The appointment form should be no more than one page (front and back). If notes about certain items need to be included, put the text in very small print.*
Chemistry representatives recommended having a central Web site with campus-wide information, with programs free to have their own supplementary Web sites with program-specific information.

CGS representatives cautioned about need for consistent information provided across all university units and about the need to make certain that certain information (such as that about fourth-quarter fee authorizations) is shared with students.

c. What are the specific changes that should trigger reissuance of the appointment document? From an administrative point of view, it is desirable for the GA appointment document to be issued once per appointment period (no more than annually?), especially given fluctuations in appointment titles, duties, supervisors, and other aspects of the appointment. This has to be balanced with a process that will be helpful to graduate students.

   If the form can be done efficiently, then reissuing it for a stipend change, unit change, title or duties change would be fine, but it shouldn’t generate more work than is necessary or create confusion.

   There was some discussion about the possibility of marking more than one title on the form to cover situations where students would be shifting duties over the course of the appointment. If this is done, it would need to be done in a way so that students had a clear understanding of which duties were associated with which time periods.

   The units represented at the meeting change the student’s title in the HR system when the student’s appointment changes. This is a best practice toward which we should work across the university.

d. How specific do the “primary duties” listed in the appointment document have to be? Could generic duties be posted on a Web site?

   This was not specifically discussed, but the rest of the conversation suggests that it would be helpful to have this available as an option for appointing units.

e. Is two weeks before the beginning of classes the right deadline for issuing these letters? Should it be two weeks before the beginning of the appointment? Especially if duties have to be specific, academic units may have difficulty with this. A later deadline, however, may not be helpful to graduate students.

   This was not specifically discussed at the meeting.

f. Does the form need to include an SSN? If not, how will units accommodate a situation where they have two or more students with the same name?

   The university will soon be issuing a statement prohibiting the use of SSNs unless absolutely necessary for the matter at hand. This would mean that SSNs could not be used on these forms. No objection was raised.
g. We need to clarify what signatures are required. Do PIs have to sign? What about advisors? How much discretion will units have in making these decisions?

This will probably be a local decision, but PIs would be expected to sign or demonstrate engagement in the process in another appropriate way.

h. Are there other issues that need further discussion prior to implementation?

Some confusing language was pointed out:
- Human Resources contact person and/or grad studies contact – Would be better to have space for a faculty contact and an administrative contact, and let units choose whether to use one or both.
- Visa note under FTE is confusing. The information about orientation/reporting date is also confusing.
- Suggest changing “supervisor’s name” to something like “supervisor’s name, if applicable.” This could also be someone generic, like a grad studies chair.

3. Concluding remarks. Representatives from the pilot programs were thanked for their participation and excellent suggestions.

4. Adjournment. The meeting ended at 1:30 p.m.

Prepared by Lamar Murphy
March 9, 2005