**Finance/ HR Subgroup**

**Meeting 1:** 4th October 2019 (edited following CFM meeting feedback)

**Chair:** Grainne Keane

**Members:** Sarah O’Flaherty and Mark Traynor

**Operation of Group:** Fortnightly meetings with agreed action points and invited guests e.g. HR Partner/Director where relevant.

**Quick Wins (Actions before Christmas)**

* **Introduction of regular communication from HR to finance in relation to appointees.** Seek commitment from HR to give regular update tracking appointees back to PAFs. This functionality will be incorporated in the next upgrade of CORE in the next 12 months, however in the meantime we are seeking a regular report from HR on appointees to posts, linked to PAFs

**Key Benefits:** Enhances accuracy of staff budgeting and forecasting and facilitates post tracking for vacancy savings forecasting.

* **Introduction of process for HR/Finance knowledge sharing in relation to the implications of SASR and Job** **sizing initiatives**. (This objective has been fast tracked from being originally intended as a medium term objective , to a “quick win”, as it is now known the timeline for completion of the SASR 2 roles Job Sizing Process is December 2019)
* **Enhance User Friendliness of Salary Exception Form:** Ensuring key information is provided to streamline approval process and enable tracking to original PAFs.

**Key Benefits:** Streamlines workflow in approval process. Enhances accuracy of staff budgeting and forecasting and facilitates post tracking for vacancy savings forecasting.

**Scope and Objectives for medium term**

* Clarification of role of HR Partner versus Finance Manager .
* Introduction of regular HR/Finance meetings to share knowledge and improve processes.
* Introduction of process whereby Finance are kept in the loop on key HR developments/ policy changes such as SASR, Job sizing etc.
* Improvement of information sharing in relation to secondments, retirements, CIDs, promotions etc.
* **Automatic tracking of appointees back to PAFs on core/ infohub**. Work closely with HR to ensure user friendliness of this feature which is to be included in the planned upgrade of CORE in the next 12 months.

**Key Benefits:** Enhances accuracy of staff budgeting and forecasting and facilitates post tracking for vacancy savings forecasting.

* **Enable FMs to edit & customise PAFs to optimise finance user friendliness** Work with HRIS to grant finance managers the ability to edit PAFs for minor changes and also to include a field for a locally generated unique post number.

(As this functionality is likely to be incorporated in the next upgrade of CORE in the next 12 months, this objective has been moved from being originally intended as a “quick win” to a medium term objective)

**Key Benefits:** Streamlines workflow in PAF approval process, enhances accuracy of staff budgeting and facilitates post tracking.