

Southwest EFC Orientation Handout



About the EFCs

The Southwest Environmental Finance Center is part of a network of environmental finance centers, collectively known as the [Environmental Finance Center Network](#) (EFCN). The EFCN is, mostly, a university-based organization creating innovative solutions to the difficult how-to-pay issues of environmental protection and improvement. The EFCN is composed of [eleven Centers](#) and works with the public and private sectors to promote sustainable environmental solutions while bolstering efforts to manage costs. The EFCN was established by the EFCs (not EPA, which is an important distinction) in 2000 in New Mexico. It was created through a Memorandum of Understanding and a set of by-laws and has a leadership structure with EFC Directors taking turns, annually, serving as President, Vice-President, and Secretary of the Network.

About the Southwest Environmental Finance Center at the University of New Mexico

The Southwest Environmental Finance Center, formerly the New Mexico EFC, established in 1992, was the first EFC created by a U.S. Environmental Protection Agency (EPA) grant. We refer to this ongoing grant as the ‘base’ or ‘core’ grant. Heather Himmelberger has been leading the SW EFC, as the Director, since 1996. Each EFC is independently run and operated, but they are “sister” organizations, in the sense that they were all created by the EPA with the same general mission, and they often work together on projects.

While we refer to ourselves as the Southwest EFC in speech, when writing out our name we typically use SW EFC. In formal writing, we always spell out “Southwest Environment Finance Center (SW EFC)” the first time we use it in a document, after which we use just SW EFC. Since we work all over the world, that sometimes creates a sense of confusion for our partners, who may not realize that SW stands for the “southwest” cardinal direction, the reference to our geographic location within the United States. When this happens, we simply explain it so that they remember our name. Additionally, we pronounce it as S-W-E-F-C or Southwest EFC. However, occasionally, some people call us “sweffsee” by pronouncing it as a word instead of initials.

The SW EFC is situated within the Center for Water and the Environment (which fits under the School of Engineering as a whole) and we support UNM’s public service mission.

The SW EFC is physically located on the 2nd floor of the Centennial Engineering Center of the University of New Mexico, which is located at 300 Redondo W Dr, Albuquerque, NM 87106, USA. Our central office suite is located in CENT 2041, including a kitchen/breakroom (CENT 2041A) and a storage closet (CENT 2041F), and a conference room (CENT 2042). You are welcome to store your lunch in the refrigerator in the kitchen, please label your items with your name and help keep things tidy by removing your expired items.

The SW EFC is exclusively “soft money funded,” which means we are funded through grants and contracts from entities external to the University; we do not receive any state legislative funding. This means that we are responsible for securing our own funding, through proposals submitted to many types of entities, including various levels of government (local, state, federal), foundations, service providers, and professional organizations. This approach to funding gives us more control over our own destiny and is much more a positive than a negative. All staff members may be called upon to contribute to writing these proposals.

At the SW EFC, we have historically had a focus on drinking water, but in the past few years have diversified our efforts into wastewater projects, green infrastructure, and other areas. A select group of our projects are featured on the [Our Work page](#) (there are many others!) and a list of [services](#) is also available on our website.

Our staff is diverse, with backgrounds in the sciences, engineering, law, accounting, software development, writing and editing, public administration, GIS, and digital arts. For more information on everyone's background, see the [Staff](#) page on the website. From time to time, we organize social get-togethers (either in-person or virtually) in order to relax and get to know each other. These events are optional, but you might find them helpful in getting to know your co-workers. Occasionally we have events, such as retreats or celebrations that are during work hours and we highly encourage or mandate attendance at these events.

At the SW EFC, we are committed to the following core components of employee competencies for all staff members and strive to provide an environment in which all staff can achieve their greatest potential.

1. Work Quality/Productivity
 - Accuracy, thoroughness, consistency, and efficiency of work that achieves standards of high quality
 - Developing short- and long-term goals and completing work according to goals and priorities
 - Anticipating problems and adapting to changes by using resources effectively
 - Completing work in a timely manner
2. Teamwork/Collaboration
 - Creating internal and external partnerships
 - Maintaining effective and positive relationships with other employees, management, and clients to achieve desired work results
 - Treating all people with respect
 - Coordinating with and informing colleagues of plans and actions
 - Following through on commitments
 - Accepting personal accountability for results
3. Job Knowledge
 - Maintaining the knowledge and skills needed for job assignments
 - Understanding programs and services provided by the organization
 - Understanding resources needed to achieve job requirements
 - Knowledge of organization's vision, mission, and core values
 - Willingness to learn new skills and capabilities
 - Employees are encouraged to share ideas for areas they would either like to see the organization grow or areas they would like to move into.
4. Communication Skills
 - Effective verbal and written communication with other employees, management, and clients
 - Careful attention to management directives and client needs
5. Dependability/Accountability
 - Meeting all established expectations for attendance
 - Responding to requests from colleagues and clients in a timely manner
 - Handling a fair workload
 - Meeting deadlines and commitments
 - Accepting responsibility for actions
 - Working both in teams and independently
 - When required, working extra hours to meet a deadline or the needs of specific project or proposal. (We do our best to minimize this need but for any exempt employee, this may happen from time to time.)
6. Employee Development
 - Promoting a safe, secure, and respectful workplace
 - Providing professional development opportunities for all employees

What we expect from you

1. The Southwest EFC staff share these core values:

- Professionalism: staff should maintain a professional demeanor at all times when dealing with co-workers and clients.
- Responsiveness: we strive to respond to requests from co-workers and clients in a timely manner.
- Collaboration: we work together both internally and with our sister EFCs, as well as with our clients.
- High Quality Assistance: we hold ourselves to the highest standards of assistance to all of our clients and the communities they represent. This means we often go “above and beyond” to see that our clients get the assistance they need.

2. Attendance, punctuality, and time-management:

- The EFC is a professional, deliverables-based organization. We have a large diversity of projects, and you may be asked to work on more than one at any given time. It is important for each staff member to develop tools for time management in order to meet both internal and external deadlines. There are a large number of tools available for this purpose. If you struggle with this aspect of your work, ask the director, your supervisor, or co-workers for suggestions and advice.
- The working arrangements of individual staff members may vary from always working remotely to always working in the office. Each of these arrangements are made for various reasons to best serve the mission of the SW EFC. In general (outside of the pandemic), new employees are expected to work in the office through their probation period. Full-time employees are expected to work 8 hours every day (with appropriate breaks) and should plan to be at the office or online during regular business hours (between 8 AM and 5 PM Mountain Time). Arrangements for a more flexible schedule can be discussed directly with your supervisor. There is no guarantee that any particular arrangement will be accepted; it depends on your role, your responsibilities, and the requirements of the SW EFC at that time.
- Working in the office is a valuable opportunity to collaborate in a face-to-face way with co-workers or others within the School of Engineering or the University as a whole. Each employee is encouraged to take advantage of these opportunities and seek out chances to meet in person vs. using virtual meeting software, brainstorm with others, get to know others on the team or take the opportunity to learn about someone else’s work.
- Inform your supervisor and any Project Manager you are actively working with of any schedule conflicts, or vacation requests as soon as possible.
- If you are sick, please DO NOT COME TO THE OFFICE, but make necessary arrangements with your project team(s) if a deadline is approaching. If you are able to work while sick and wish to do so, please notify your supervisor that you will be working from home.

3. We use SharePoint ([Southwest EFC Site Collection](#)) for file-sharing. Please save all work-related documents to SharePoint, where files are automatically backed up. Since 100% of our work is project-related, the most-used Library within our SharePoint is the Projects folder found at [SharePoint > Site Contents > Projects](#). You will also have a folder (in your name) available to you within the SharePoint ‘Staff Folder’ Library under the root directory ‘SW EFC’ where any of your non-project-related work documents can be saved, if no Projects folder can be associated with it. Please be aware that, with the exception of your staff folder, all files in SharePoint are shared files. So do not put files or information that you do not intend to share in any SharePoint file, or folder, other than your named staff folder. Our

SharePoint file space is somewhat limited, so please do not use your staff folder for non-work-related items. You will have a separate OneDrive associated with you as an employee of UNM, which is automatically backed up and a good place to keep your files accessible from anywhere.

4. ***We use Microsoft 365's Teams*** for our internal communication in an effort to keep email communication focused on external stakeholders and project related communication publicly accessible in the appropriate Team channel. If not already granted, please be sure to ask Heather S. to add you to the Housekeeping Team and to add you to the SWEFC LISTSERV chat in Teams.
5. ***Project Management***
All SW EFC projects are assigned a Project Manager. Project Managers are responsible for assigning tasks required for the project and for seeing that the work proceeds according to the work plan. Most staff members work on multiple projects, and sometimes different projects have similar work tasks. You will be contacted by one or more Project Managers, and tasks will be assigned to you. You may be asked to attend in-person or virtual meetings related to the various projects (in addition to the regularly scheduled staff meetings). If what is being asked of you is not clear to you, don't hesitate to ask Project Managers or other team members for clarification or help getting started. All of our work is done collaboratively, and we want everyone to be successful in their job. When you are first assigned tasks for a project, it will be helpful for you to read the work plan that is part of the project folder in SharePoint. If you cannot find it, ask your project manager to point you to it or make it available to you.
6. **Smartsheet:** We use [Smartsheet](#) to track progress on project tasks. You should familiarize yourself with the Smartsheets for projects you are assigned to, but do not change these Smartsheet set ups unless you are specifically asked to do so by the Project Manager. You should add the information you are instructed to add based on your role and the work you undertake in a timely manner so that work can be recorded and tracked and properly reported to our sponsors. You should be aware that Smartsheets is a shared resource and many different people, including clients in some cases, can see what is written in Smartsheets. EVERY employee should write the contents of cells in Smartsheets in a professional manner without any disparaging or unduly negative comments about the work they are doing. If you are unclear about how to document something, particularly if there was a concern or issue with the work, seek guidance from project managers or co-workers on the best way to record the information. Assume that everything you write could end up in a progress report sent to EPA or others and write accordingly.
7. ***Blog post(s):*** We like to share information with each other, other EFCs, or utilities we work with. We do this through our blog on our website. Please keep notes on interesting things you learn or observe in your work with the Southwest EFC which you or others can use to write blog posts and work with our Outreach Coordinator to find a time to post your Blog to the website.
8. ***Please be proactive*** in setting up meetings with your project team(s) or your supervisor when there is a need to do so to share information or discuss concerns. Keep the Project Manager informed about task completion. While independent work is necessary, for the majority of the work completed at the SW EFC, collaboration is valued and integral to the success of our projects. If at any time you have a question or need input, please take initiative, and ask your team members for guidance.
9. **Please do the following ASAP** so that other SW EFC staff can get to know you:
 - Prepare a short bio and picture (landscape) to be uploaded to the Staff page of the SW EFC website
 - Upload your bio sketch using the provided template to [Southwest EFC Site Collection > Proposals > Templates - Biosketches](#)

- Upload your picture to [Southwest EFC Site Collection > Admin > Personnel & Staffing > Staff Photos](#)
- Upload your resume using the provided template to [Southwest EFC Site Collection > Proposals > Templates - Resumes](#)
- For emergency purposes, please email to [Heather S.](#) your cell phone number, a personal email address, your home address, and contact information for an emergency contact you would like us to reach out to in a situation where you may be unable to do so yourself. If you would like to share your birthday, we'll add it to the SW EFC Outlook calendar, but no pressure!
- Get together with your Project Manager(s) to get oriented to your projects
- **Use your LoboMail** account for all Southwest EFC work emails and meetings. Please ask Heather S. to add you to the SW EFC LoboMail listserv. You will be expected to use both the email and calendar functions daily to coordinate with colleagues. Please create an email signature which follows the template below, for consistency with the group. Use your official UNM position title or the official working title on record.

Heather Sissons, MS
 Program Planning Officer
 Southwest Environmental Finance Center, The University of New Mexico
 CENT 2041E
hsissons@unm.edu
 she/her/hers



If you are copied on an email that is sent to multiple people, use the **Reply All** function unless there is a business reason to remove some or all of the contacts to avoid breakdowns in communication. PLEASE be professional in all correspondence. Assume that there is always a chance that your e-mail could be forwarded to someone else and make sure that anything you write could be forwarded. Be careful about any e-mail that includes e-mail addresses from clients. If you reply all but write the e-mail as if it was only intended to be sent internally, your e-mail could go out to unintended recipients. As long as the message is written professionally, there will be much less harm done and the damage can be corrected by apologizing for incorrectly sending it. If on the other hand, the message has derogatory comments or is poorly written, it will reflect negatively on both the employee and our organization. The best practice is to be polite, professional, and positive in all e-mail communications to avoid any embarrassment or worse consequences.

- **Use your Outlook calendar** in your UNM account. Include all commitments during the workday and share it with all Southwest EFC staff members. When you share your calendar with others at the SW EFC set the permission level to “Can view all details”. The permission levels for “My Organization” should be set at “Can view when I’m busy”. The Organization in this case is all UNM and not just the SW EFC. Select the option to request that they share their calendars back with you. Please use the calendar function to schedule meetings, keep track of obligations, and understand the rest of the staff’s availability. Once you share your calendar, it becomes public within the SW EFC. If you include items that you do not want others to see, please mark them as private, but please do include all obligations during the workday so that others can see your availability. Unless there is a very specific need to do so, all **work related**

obligations should be marked public, rather than private. Calendar shares should include the ability to see all items on the calendar but do not need to include the edit function.

10. **Meetings:** We have a monthly staff meeting (currently on the first Friday of the month, but that is subject to change). All staff members are expected to attend unless other meetings or client obligations prevent it. Please try to avoid scheduling other obligations at the time reserved for staff meetings. If you are being asked by an outside entity to schedule a routine event that would conflict with all staff meetings, please bring this to your supervisor's attention as soon as possible to discuss possible options including a rescheduling of the routine staff meeting day/time. If you need to schedule a meeting that needs a conference room, you may book CENT 2042 using that Outlook calendar.
11. **Business Cards:** See the UNM Business Card page for details and the fillable order form: <https://brand.unm.edu/stationery/business-cards.html>. A template with standard SW EFC information across all staff filled in is [here](#). Be sure to save a copy before adding your own information to preserve the template for future staff. When completing the title line, use your UNM official job title or approved working job title only.
12. **Parking:** Parking on the UNM campus is at your own expense. Unfortunately, the waitlist for campus parking is pretty long. You'll want to get on the waitlist for nearby parking through the University: <https://pats.unm.edu/>. B lot is the closest, followed by P, then C. Your default permit option will probably be South lot, which I don't recommend since it's a mile and a bus ride away.

While on the waitlist for a campus parking space, there are nearby private parking lots offering a monthly subscription through [Premium Parking](#). Some people park on the street in the neighborhoods south of campus (Gold and Pine, for example) and others pay to park in the church parking lot across the street.

The SW EFC maintains a reserved parking space in the B lot east of Centennial Engineering and north of the Electrical and Computer Engineering building. (Spot B-81) This spot is maintained for the use of clients and visitors to the SW EFC but can be used by staff in limited circumstances. It can be reserved by using the SW EFC outlook calendar. Please use the green "Parking space is used" category for parking space reservations. If you need to reserve it for a visitor and it is already reserved by another staff member, please contact that person and resolve the issue. We encourage staff to use the space when necessary but it should not be used on a routine or recurring basis.

13. **Computer/Internet Issues:** Contact Benjamin Murray, SOE IT Officer, at murrayb@unm.edu or via Teams.
14. **Snail Mail:** Even in the internet age, we sometimes have occasions to mail things through the postal service. You can find instructions for mailing at [Southwest EFC Site Collection > Admin > Personnel & Staffing > Orientation Materials > Mailing Instructions](#).
15. **Time Reporting:**
Bi-weekly payroll employees:
UNM uses the LoboTime Timekeeping System to synchronously track non-exempt employee time. That means that you will need to clock in when you start working and clock out when you are done for the day. There are several job aids you might find handy on the time.unm.edu website: <https://time.unm.edu/ukg-training-modules/index.html>. SW EFC staff are welcome to use the UKG Pro app or the Lobotime tile in my.unm.edu to clock in and out.

Here are instructions on how to access LoboTime in MyUNM and the mobile app:

Access via MyUNM:

The LoboTime tile in myUNM.edu → Staff tab → Lobotime Tile which will send you directly to the new UKG Pro LoboTime login page: [UKG PROD Login](#)

You will then be prompted to sign in using SSO. You should utilize your @unm.edu or @salud.unm.edu email address and password to login.

Mobile App Access:

UKG now offers a mobile app for added convenience:

- Search for “UKG Pro” in your device’s app store.
 - Icon: Dark green background with yellow lettering.
- After downloading, the app will prompt you to connect to a workspace.
 - Copy and paste this link: [UKG PROD Login](#)
- Sign in using SSO and set up facial recognition if desired

Monthly salaried employees:

If you are a salaried employee, you will not turn in a timesheet, but will be paid your monthly salary automatically on the last working day of each month (with the exception of December). However, you are required to complete a monthly allocations report to divide your time among the projects you work on. You will find the latest Allocation workbook at [Southwest EFC Site Collection – Admin > Allocations Reporting](#). Heather S. will add a worksheet with your name. On the 23rd of the month, you must open your tab and enter the amount of time (by percentage) you worked on each project to which you are assigned.

The allocation is a percentage of time worked on each project that month. This is based on all hours worked so if for example you only work 3 weeks and take 1 week off for sick leave or vacation, you are allocating that three weeks of time as 100% of the month. To help you understand how the number of hours you work on a project each month equates to percent, refer to the FTE reference table on the Sample worksheet of the allocation workbook.

16. Leave:

- All regular, exempt staff working more than 50% time accrue paid [annual leave](#) and [sick leave](#) in proportion to their work schedule. If you wish to take annual leave, please discuss your plans with your supervisor, submit the leave request in the LoboTime system, and then post to the Teams channel ‘Leave or Vacation Plans’ within the Housekeeping channel and add the leave to the ‘Out of Office Tracker’ at the top of the channel. You should also block your Outlook calendar for the time you will be out of the office and set it to ‘Show As: Out of Office’ to alert team members trying to schedule meetings. Normally, requests for leave are granted, but it is important that managers and team members be informed in advance, if at all possible. You are expected to complete any work required by a deadline prior to your vacation if that deadline will occur during your time off. If you are not able to do that, you may be asked to shorten or cancel your vacation or make arrangements with a co-worker to complete the assignment. It is always best to request leave as far in advance as possible. Asking for time off before making your final plans will avoid disappointment for all concerned. Of course, emergencies will always be accommodated. Whenever you are out on sick leave or vacation, please add that information to your Outlook calendar so that all staff members can see that you are not available.

Leave reporting in LoboTime:

- Bi-weekly (hourly) employees who are eligible for leave request both annual and sick leave in the LoboTime system.
- As mentioned above, exempt employees must report their leave in the LoboTime system as well. At the beginning of each month, employees must review their leave reported for the prior month for accuracy and approve their leave report, whether or not leave is taken during that month. At that time the leave report will be reviewed/approved by your supervisor and moved on to the next level of approvals.
- If you have paid leave to report other than annual, sick, or paid parental leave, your supervisor will need to enter that on your behalf.

- 17. *Recycling and trash:*** There are recycling bins outside of CENT 2009 for paper (blue bin), cardboard (canvas and wire bin), and plastic/aluminum (cardboard box). Flatten all cardboard prior to placing it in the bin. Do not put trash or plastic bags in any of these bins. They are not recyclable and Facilities will not take them (and they will bother the CWE lab manager about it).

If you have trash that will not fit in your office trash can, you may place it in the Centennial trash room located in CENT 1053 (behind the 1st floor elevator in the Southeast corner of the building). For large scale cleanouts or equipment, a work order may be needed, please talk to Heather S. for the best way to proceed.

18. *In case of a fire drill:*

Exit the building on the west side and head to the grass area across the street (Redondo Blvd). Wait there until we are given the ok to return by SRS or Campus Police.

19. *Questions:*

- If your questions are project related, talk to the appropriate Project Manager. They will be glad to help you.
- Administrative questions may be directed to your supervisor and/or Heather S.

- 20. *The most up to date version of this document can be found in Sharepoint at Admin\Personnel & Staffing\Orientation Materials.***