

CFO Roundtable



July 28, 2011

**Mike McKee, Assistant Vice President
and University Controller**

**WELCOME &
INTRODUCTIONS**



**Steve Slater, HR Training and
Organizational Development**

Angel Kwolek-Folland, Provost Office





UF Effort Reporting

AND

Faculty Assignment Report

Steve Slater
Grants Training Manager
Training and Organizational
Development

Project Overview

- In 2010, UF was awarded \$678 million in sponsored research funding - more than all the other Florida universities combined.
- To meet the needs of our growing research enterprise, it's critical the University continues to refine its business processes and demonstrate value to sponsors.

Project Overview

- Effort reporting has become a main focus of federal auditors at educational institutions.
- Several audits identified the need for UF to improve its grant accounting practices, especially in the area of effort reporting.

Project Overview

- The offices of the Chief Financial Officer, Chief Information Officer, Provost and Institutional Planning and Research partnered to develop a new Effort Reporting system.
- After a public bidding process, CedarCrestone was selected to implement the Effort Reporting Toolkit.

Developed With Care

- Project has been guided by a steering committee that includes faculty, grant administrators, and core office staff members.
- Developed with the input and involvement of UF deans, department chairs, faculty, and department coordinators.
- Focus groups were held across campus to query users about their needs and how they use the FAR.
- The offices of Contracts and Grants, Division of Sponsored Research and the University Controller have been working to provide better documentation and support of the policies related to Effort Reporting, Cost Sharing, and Cost Transfers.

System Overview

- Comprised of 3 Modules
 - Faculty Assignment Report
 - Commitments
 - Effort Certification



Project Benefits

New, online Faculty Assignment Report (FAR)

- Improved documentation of faculty achievements towards tenure and promotion.
- Reduces waste and eliminates the need for collecting signatures on paper.
- E-mail notifications for faculty whenever action is needed.
- Simplified reporting of student contact hours.

Project Benefits

Integrated Commitments Module

- Tracks University commitments of key personnel to sponsored research.
- Simplifies the management of effort and cost-sharing commitments for sponsored projects.
- Helps departments better manage the ebb and flow of effort from semester to semester.

Project Benefits

Easy-to-Use Effort Certification

- Displays data from the FAR and the Committed modules side-by-side with the effort certification values.
- Enables departments to compare planned effort with actual effort.
- Helps departments manage the sources of payroll and fringe benefits.

Next Steps

To learn more:

- Review the online training course in myUFL (RSH 200 – Effort Reporting).

My Self Service > Training and Development > Request Training Enrollment



The screenshot shows the myUFL Training website interface. At the top left is the myUFL Training logo, and at the top right is the UF Effort Reporting logo. A navigation menu on the left lists several options: Home, Introducing the FAR, Effort Reporting Overview, Dispelling the Myths, Understanding Activity Categories (highlighted in orange), Commitments Module Overview, Understanding Your Role, and Resources. The main content area is titled 'Instructional Activity' and features a sub-section for 'Thesis & Dissertation'. This section contains text explaining that committee assignments for beginning graduate students (thesis credit) and advanced graduates (doctoral degrees and dissertation credit) should be reported as 'Departmental Funded Research' or 'Externally Funded Research/Other Sponsorship'. To the right of the text is a photograph of three people (two men and one woman) sitting around a table, looking at documents and a laptop, likely in a meeting or classroom setting.

Next Steps

Request the appropriate roles to begin using the system today!

UF_ET_FAR_INITIATOR - Role for departmental users responsible for entering the Faculty Assignment Report information.

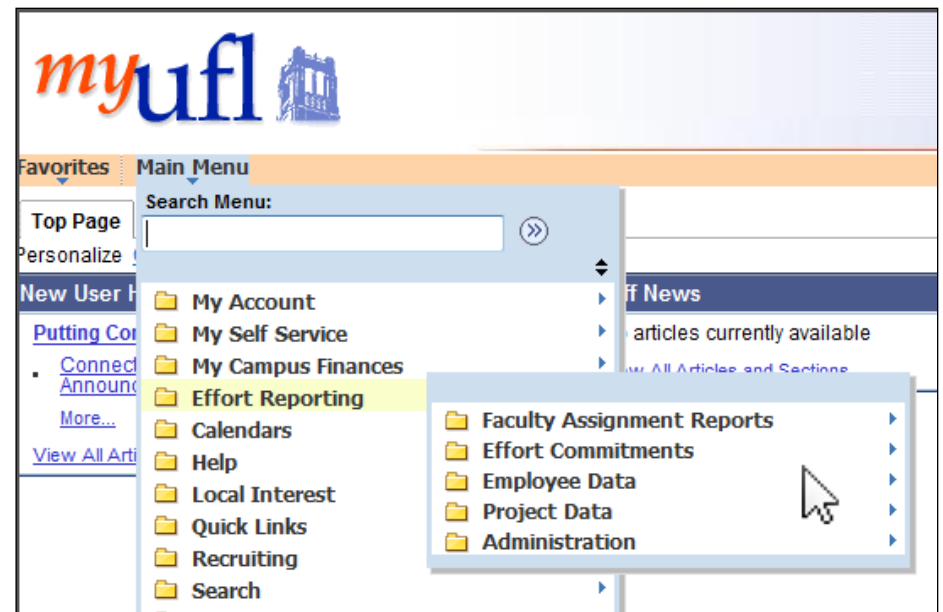
UF_ET_FAR_APPROVER - Role for department chairs or deans who need to approve Faculty Assignment Reports for faculty members.

UF_ET_FAR_ADMIN_APPROVER - Role required for users who will need to approve a Faculty Assignment Report for a department Chair or Dean.

UF_ET Effort COORDINATOR - Departmental role for users to coordinate and fill out the Effort Reporting information for faculty.

Next Steps

- Try using the online FAR for the Summer 2011 semester.
- Get acquainted with the system prior to the completion of Summer effort certification this October.

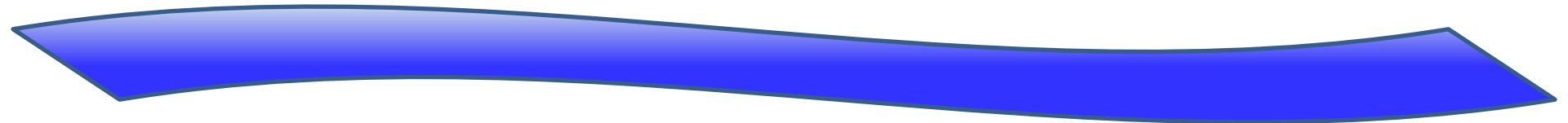


**KATHLEEN TILLET, SR.
ASSOCIATE CONTROLLER**

**PAYROLL & TAX SERVICES,
GENERAL ACCOUNTING,
FINANCIAL REPORTING**



- Customer Service Survey Update
- Scorecard Summaries



**KIM SIMPSON, SR.
ASSOCIATE CONTROLLER**

**COST ANALYSIS &
EFFICIENCIES AND
CONTROLS**



Departmental Visits

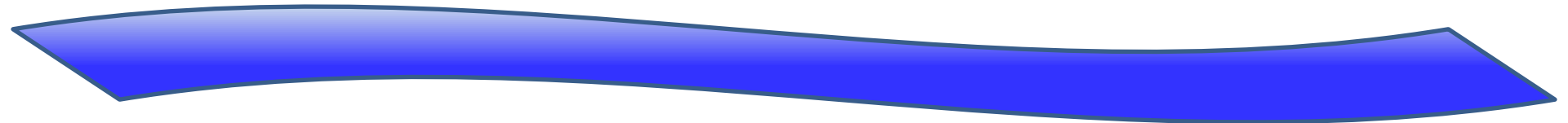
- Operational Controls and Efficiencies is available to conduct department visits to:
 - Help with concerns with 9.1 upgrade
 - Other business process questions (including questions related to Scorecards)
 - Reviews of controls or departmental procedures
- For assistance, please contact Barbara Bennett or Kim Simpson at 392-1321, bbennet@ufl.edu, simpsonk@ufl.edu

**BRIAN KUHL ,
ASSISTANT CONTROLLER**

PAYROLL & TAX SERVICES

- Currently conducting departmental visits regarding their Unrelated Business Income (UBI) - generating activities
- 2nd Annual Unrelated Business Income Tax training session
2:00pm – 4:00pm on August 29, 2011
Voyles Presentation Room, Admissions Lobby, 201 Criser Hall

Notifications will be sent via email later this month and a reminder again in mid-August

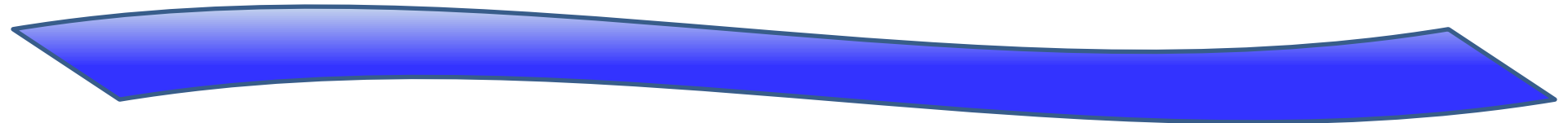


**RANDY STAPLES,
ASSOCIATE CONTROLLER**

**DISBURSEMENT SERVICES
& ASSET MANAGEMENT**



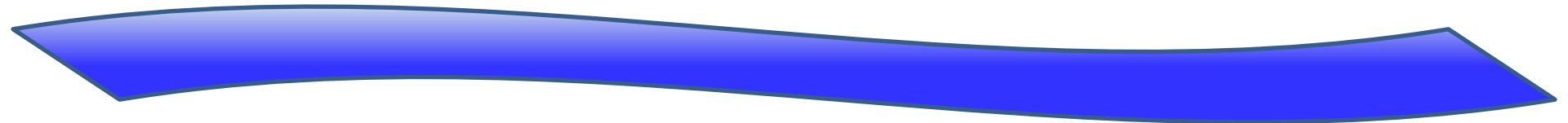
- E-Payables
- Think before you Buy



**CHERYL BELL, ASSOCIATE
CONTROLLER**

TREASURY MANAGEMENT

- Credit Card Workshop
- Human Subject Incentive Payments (Research Participants)



**SHEELA MOUDGIL,
ASSOCIATE CONTROLLER**

GENERAL ACCOUNTING



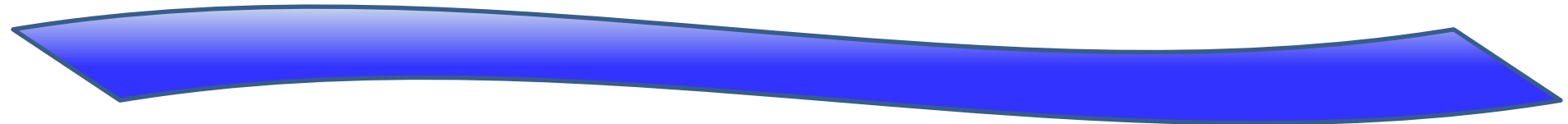
- FI User Group

LISA DEAL, DIRECTOR

PURCHASING SERVICES



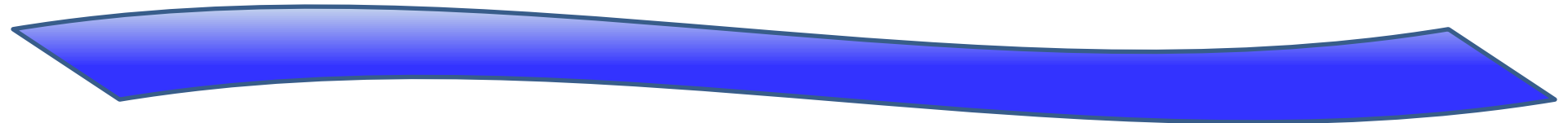
- myUF Market Upgrade
 - the new “chartfield favorites” functionality
- New Associate Director of Purchasing
 - Suzanne Penn, begins Aug. 16th



GREG DUBOIS, DIRECTOR

**BUSINESS RELATIONS
ENTERPRISE SYSTEMS**

- 9.1 Upgrade Issues / Status



**MIKE MCKEE, ASSISTANT
VICE PRESIDENT AND
UNIVERSITY CONTROLLER**

FINANCE & ACCOUNTING



- Effort is open
- Capitalization Threshold Increase
- GBAS/SSC Update
- Audit Update
 - Auditor General Audits
 - IRS Audit

QUESTIONS?

CONTACT
DANNIELLE GODWIN
PGODWIN@UFL.EDU