Working Towards the Future: Resources Available to Campus

Presenters: Greg DuBois – Assistant Vice President, Finance and Planning
Melissa Curry – Director, Recruitment & Staffing
Ana Meyer-Ruiz - Research Administrator III, Cost Analysis
Business Process Review

Greg DuBois
Assistant Vice President
Finance and Planning
• **Purpose**

The BPRA Committee serves in an advisory capacity to the University’s Vice President and Chief Financial Officer providing governance over the CFO’s business process improvement initiatives and the work effort of the CFO’s Business Process Improvement office. The primary focus areas for these process improvement initiatives are - university administrative functions and activities and best practices.

• **Role:**
  – The BPRA Committee will assist with:
    • Identifying problematic business processes perceived to be inefficient, ineffective or unnecessary
    • Prioritize business process improvement initiatives
    • Lead the development of university “Best Practices”
## COMMITTEE MEMBERS

<table>
<thead>
<tr>
<th>Campus Representation</th>
<th>Team</th>
<th>Administrator</th>
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<tbody>
<tr>
<td>Main Campus</td>
<td>CLAS</td>
<td>Margaret Fields</td>
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<td>IFAS</td>
<td>IFAS</td>
<td>JoAnn Davis</td>
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<td>HSC</td>
<td>Pathology</td>
<td>Mike Guske</td>
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<td>Law/GBAS Rep</td>
<td>Law</td>
<td>Deb Staats</td>
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<td>Main Campus</td>
<td>COE</td>
<td>Sandra Bass</td>
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<td>BPR Office</td>
<td>CFO</td>
<td>Elizabeth Amdur</td>
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<td>Committee Support</td>
<td>CFO</td>
<td>Greg Dubois</td>
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• **Purpose**

The BPI Office is the designated unit within the CFO organization responsible for coordinating business process improvement initiatives and will serve as support for the BPRA Committee.

• **Role**
  
  – The BPI Office will:
    • Perform reviews of university business processes
    • Recommend process changes and improvements
    • Coordinate process improvement initiatives
    • Conduct project success reviews
    • Consult with college and department administrative units to:
      ➢ analyze departmental procedures
      ➢ evaluate workloads and staffing levels
      ➢ identify potential opportunities for improvements and efficiencies
    • Coordinate departmental support visits
    • Serve as liaison between CFO units and campus units
• Example Review Items
  – Complimentary travel TA’s
  – Travel budget checking
  – Cash advances
  – Foundation payment form
  – Delivered reports
  – Receiving policy
  – myUFL login “time out”
  – Communication
  – myUF Payment Solutions
• Purpose:
  – The purpose of the Reporting Services is to provide reporting support to colleges and departments so units can effectively manage their business operations

• What we do:
  – Help administrative staff understand their data and reporting needs
  – Help staff build reports to meet their needs
  – Promote existing training classes and tools developed by Training and Organizational Development
• **What we are:**
  – Reporting Subject Matter Experts for:
    • Enterprise Reporting
      ➢ Monthly Financial Reports
      ➢ Prompted Reports
      ➢ FIT Cubes
      ➢ HR Cubes
    – PeopleSoft Queries
    – Query Studio
    – myInvestiGator

• **What we are not:**
  – Trainers
  – Substitutes for existing training methods
• Target audience
  – Administrative staff in colleges and departments
    • Business administrators
    • Fiscal staff
    • HR staff
    • Research administration staff
      – Post Award

• Who we can help
  – Basic unit staff
    • Minimal reporting skills
    • Basic reporting needs
  – Intermediate unit admin staff
    • Moderate reporting skills
    • Mid-level reporting needs
  – Advanced unit admin staff
    • Advanced reporting skills
    • Expert level reporting needs
Workforce Analytics

Melissa Curry
Director
Recruitment & Staffing
Workforce Analytics

• Analytics and benchmarking are necessary for addressing strategic human capital challenges
• Analytics are vital for strategic workforce planning
• Visuals provide snapshots for quick review and analysis
• Enterprise Systems and HR partnered to develop a prototype
https://analytics.erp.ufl.edu/hr/

Questions?
You may email questions and comments to Melissa Curry, melissa-curry@ufl.edu
Quality Assurance in Sponsored Projects

Ana Meyer-Ruiz
Research Administrator III
Cost Analysis
• Objectives
  – Quality assurance purpose
  – Quality assurance services
  – Benefit to departments
• To help the University of Florida to continue to be compliant with federal guidelines and standards
• Quality control check of contract and grants activities by department
• Quality assurance for allowability, allocability and reasonableness
Notify Departments

Entrance Meeting

Document Requests and Staff Meetings

QA Review

Meeting to present findings and recommendations

Follow-up
Quality Assurance Review

• General Expenses
  – Personal reimbursements
  – Travel
  – Payroll/Effort
  – PCard
  – Equipment purchases

• Department Policies
• Review CAS approvals to verify the estimated amount does not exceed the approval provided by DSP

• Review account codes to identify transactions that should be charged to accounts that would normally be included as Indirect Cost

• Review CAS job codes and effort
- Interview with Faculty to verify
  - Effort reporting
  - Re-certifications
  - Large percentages of time charged to sponsored projects
  - Allocations of travel and large purchases
Services to Departments

• Identify opportunities for improvement in policies and procedures
• Identify significant issues and risks at the department
• Provide recommendations and a plan of action for the department including training and resources
Service to Departments

• Training
  – myInvestiGator
  – Cost principles (A-21)
  – Classifying cost correctly
  – Award management
  – Effort
  – Over the cap salary
  – 2/9 rule for NSF
Ana Meyer-Ruiz
Cost Analysis
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