

URICA:
Annual Reports; Position & “Dept”
Naming Alignments

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Annual Reports: Timing Change

- Email coming shortly to announce a change in timing for Annual Reports submission
 - *May 15th - due date planned*
 - *March 1st - call to be issued*
- Aiming to accomplish 3 goals (next slides)
- Splitting up retrospective fiscal year end from current state & prospective activity
 - **Retrospective Fiscal Year End** = year-end funding sources analysis; operations evaluation; proposals & awards activity
 - **Current State & Prospective** = narrative; goals; programmatic evaluation; YTD proposals & awards activity

Annual Reports: Timing Change

- **What is changing?**
 - Timing of submission & timeline covered in report narrative
 - Annual Meeting will include year-to-date sponsored
 - Fiscal year end reports to be provided prior to Annual Report meetings
 - Create an administrative meeting to review those reports and operations evaluation
 - Submission will include Management Budget request (rather than 2Q projections)

Annual Reports: Timing Change

- **What is not changing?**
 - Overall format and material reported
 - Importance of timely submission
 - Programmatic factors reviewed
 - Annual Report Meetings (same timing)
 - Major resource requests/budget changes to occur outside this process

Annual Reports: Timing Change Goals

Goal 1: Programmatic

Ensure the narrative portion of Annual Report and discussion during Annual Meeting is as up-to-date as possible; enable Annual Meeting to focus more on programmatic aspects and goals

Annual Reports: Timing Change Goals

Goal 2: Budget

Obtain budget request that most accurately captures needs for the upcoming year, and have request cover both OR URIC Allocation and the Management Budget Authority

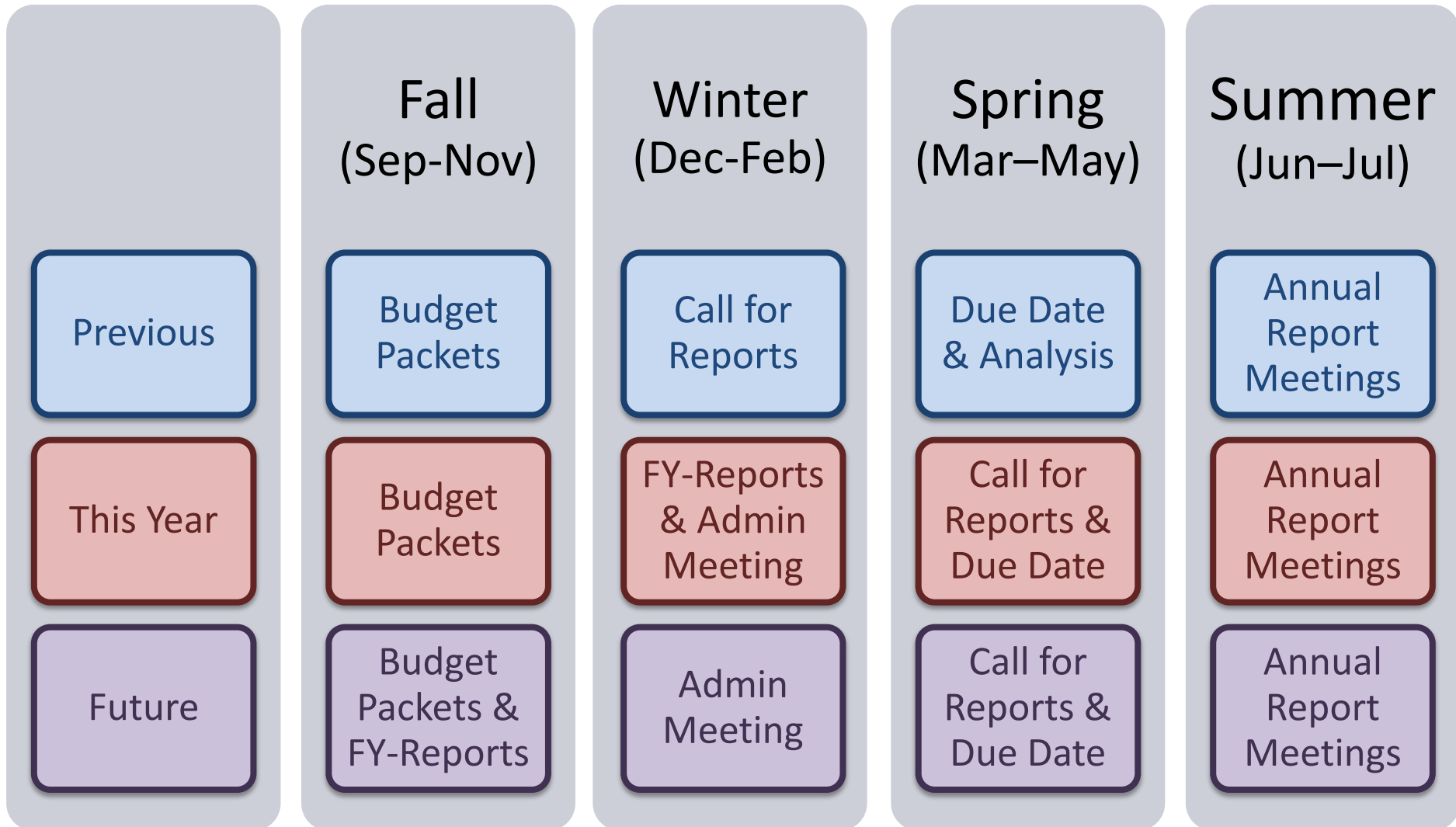
Annual Reports: Timing Change Goals

Goal 3: Operations and Fiscal Year Activity

Provide fiscal year oriented reports and analysis closer to the year-end to allow for intervention/course-correction when needed; create opportunity for more in depth and timely discussion on operations

Description of Activity	Months in Fiscal Year												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Collect and compile year-end metrics and analysis	Light Blue	Light Blue	Light Blue	Light Blue									
Send year-end report & operations eval.			Light Blue	Light Blue	Light Blue								
URICA meet with URIC lead admin.			Light Purple	Light Purple	Light Purple	Light Purple							
Revise and issue call for reports				Light Orange	Light Orange	Light Orange	Light Orange						
Complete and submit reports							Light Green	Light Green	Light Green				
Discuss reports and answer questions							Light Purple	Light Purple	Light Purple				
Receive and review reports									Light Blue				
Send reports w/ metrics to AVPs									Light Blue				
Review and evaluate reports									Light Orange				
Annual Report Retreat									Light Orange	Light Orange			
Follow-up budget meeting (as needed)										Light Orange			
Meetings with Directors, URIC Lead Admin, URICA, AVPs											Light Red	Light Red	Light Red
Key:	Ongoing		Finished										
OR URICA & Leadership	Light Orange		Light Orange										
OR/URIC Leadership	Light Red		Light Red										
OR/URIC Admin	Light Purple		Light Purple										
OR URICA Only	Light Blue		Light Blue										
URIC Only	Light Green		Light Green										

Annual Report: Timeline Comparison



'Department' Naming Alignment

- Creating standard approach to “Department” naming for URICs
 - <Acronym – Short Name>
 - URIC – Univ. Res. Inst. & Centers
- Aligning names across all systems
 - NU Financials = myHR = InfoEd
 - “myHR Published Name” can be longer and fully spelled out
 - Each entity may not need all three
 - Working on definitions of when a record should be created in each system
- Always consult with URICA before creating new “dept” IDs
 - Note: New 171 projects can be created by units for business purposes as needed

Position Naming Alignment

- Consistency across function/responsibility
- URIC Director (faculty) standardization
 - More guidance forthcoming, clean-up occurring
- ‘Director of...’ / Functional Directors
 - Creating “families” for main types, with variations
- For Faculty and Research Faculty performing administrative or leadership roles:
 - Ensuring an “Administrative Faculty” (ADF) position is created in the system

Position Naming: Next Steps

- Review of staff positions
 - Align names to current job families
 - E.g. Research Administrator 2 now should be Sr. Research Administrator
 - Ensure working titles are appropriate
- Modeling administrative support
 - Common positions and structures identified
 - Scope factors and positions

Closing & Questions

THANK YOU!!!