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.
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.
<table>
<thead>
<tr>
<th>Description of Activity</th>
<th>Months in Fiscal Year</th>
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</thead>
<tbody>
<tr>
<td>Collect and compile year-end metrics and analysis</td>
<td>Sep       Oct  Nov  Dec  Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep</td>
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<td>Send year-end report &amp; operations eval.</td>
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<td>URICA meet with URIC lead admin.</td>
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<td>Revise and issue call for reports</td>
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<td>Complete and submit reports</td>
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<td>Discuss reports and answer questions</td>
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<td>Receive and review reports</td>
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<td>Send reports w/ metrics to AVPs</td>
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<td>Review and evaluate reports</td>
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<td>Annual Report Retreat</td>
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<td>Follow-up budget meeting (as needed)</td>
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<td>Meetings with Directors, URIC Lead Admin, URICA, AVPs</td>
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**Key:**
- OR URICA & Leadership
- OR/URIC Leadership
- OR/URIC Admin
- OR URICA Only
- URIC Only
### Annual Report: Timeline Comparison

<table>
<thead>
<tr>
<th>Fall (Sep-Nov)</th>
<th>Winter (Dec-Feb)</th>
<th>Spring (Mar–May)</th>
<th>Summer (Jun–Jul)</th>
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</thead>
<tbody>
<tr>
<td><strong>Previous</strong></td>
<td><strong>Call for Reports</strong></td>
<td><strong>Due Date &amp; Analysis</strong></td>
<td><strong>Annual Report Meetings</strong></td>
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<tr>
<td><strong>This Year</strong></td>
<td><strong>FY-Reports &amp; Admin Meeting</strong></td>
<td><strong>Call for Reports &amp; Due Date</strong></td>
<td><strong>Annual Report Meetings</strong></td>
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<tr>
<td><strong>Future</strong></td>
<td><strong>Admin Meeting</strong></td>
<td><strong>Call for Reports &amp; Due Date</strong></td>
<td><strong>Annual Report Meetings</strong></td>
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<td><strong>Budget Packets</strong></td>
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<td><strong>Budget Packets &amp; FY-Reports</strong></td>
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'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!!!