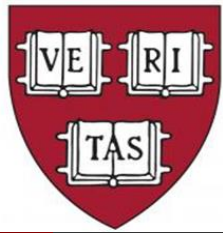**Administrators' Town Hall will be starting soon…**

# Rules of the Road for today's meeting

- **Attendees** are asked to **stay on mute** with **video off** to preserve meeting bandwidth

- Presenters will be off mute and on video during their presentations.

- If you have a **general question** that you think others would benefit from, please use the **chat** to send a message to "Everyone".

- Q&A is **<u>not</u>** a forum for **specific questions**. If you have a specific question, please follow up with one of the subject matter experts we will be providing to you at the close of the meeting.

Please note: The chat from this meeting will be saved to help update future FAQs. We will not be distributing the chat transcript.
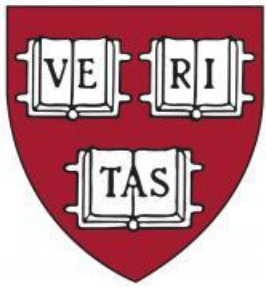
FAS Administrators' Town Hall

March 25, 2021
Zoom
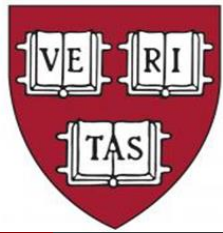
Agenda

Welcome   Mary Ann Bradley

PPRG Fall Planning- Return to Campus   Mary Ann Bradley, Chris Ciotti

Financial Update   Jay Herlihy, Nancy Guisinger

FAS Development Gift Policy   Beth Thompson, Jesse Hergert

HUIT   Lauren Szufat, Annie Rota

Administrative Operations   Stephanie Nasson

Closing / Q & A Session   Mary Ann Bradley

Welcome

Mary Ann Bradley

Interim Dean for Administration and Finance

PPRG Fall Planning - Return to Campus

Mary Ann Bradley

Interim Dean for Administration and Finance

Chris Ciotti

Associate Dean for Human Resources

Return to Campus

- President Bacow and Dean Gay announced that **Monday, August 2** is the target date for when all staff and faculty will be authorized to return to campus.

- There is no **"one-size-fits-all" approach** to returning to campus and more local guidance will be provided in the coming weeks and months.

- Dean Gay has convened five work groups as part of the PPRG to facilitate fall planning:

  • Community Health Practices – Chris Stubbs

  • Residential Life (UG and GR), including facilities – Katie O'Dair

  • Return to Campus (faculty and staff), including facilities – Mary Ann Bradley

  • Academic Program (UG and GR), including facilities – Amanda Claybaugh

  • Calendar and Scheduling – Mike Burke

Return to Campus Work Group

Co-chairs:

Mary Ann Bradley, Administration and Finance
Nina Zipser, Faculty Affairs
Chris Ciotti, Human Resources

Members:

Gillian Beecher Pierce, Office of Undergraduate Education
Christian Bray, Harvard Athletics
Tracie Cole, Division of Continuing Education
Rachael Dane, HPAC/FAS Communications
Sarah Elwell, Division of Science
Jennifer Flynn, Graduate School of Arts and Sciences
Zoe Fonseca Kelly, Faculty Affairs
Katherine Gates, Administrative Operations
Audrey Harmon, Human Resources
Andrea Kelton Harris, Human Resources
Pamela Landis, Division of Continuing Education
Sheree Ohen, Office of Diversity, Inclusion, and Belonging
Kaitlyn Santa Lucia, Harvard College
Jennifer Shepard, Division of Social Sciences
Matt Stec, Office of Physical Resources and Planning

FAS Return to Campus Working Group

- **Mission**: Develop and communicate FAS-wide guidelines for the return to campus for FAS faculty, researchers and staff that reflect the following four principles:
  - Put health and safety first
  - Protect the academic enterprise, both teaching and research
  - Leverage our breadth and diversity
  - Preserve access and affordability

- **Objectives**:
  - Gather staff, faculty and researcher perspectives from across FAS in an effort to inform the development of this work
  - Develop a framework that FAS leaders and managers can use to prepare for return to campus
  - Ensure that we successfully support teaching, learning and research
  - Prioritize equity and inclusion as we mindfully develop a plan for faculty, researchers and staff to return to campus
  - Look for opportunities to create community, collaboration and camaraderie for returning faculty, researchers and staff
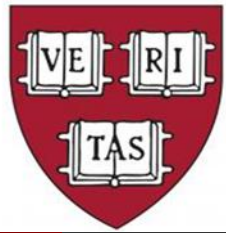 - Provide visibility and transparency to the process and the outcomes

Return to Campus Working Group

The Return to Campus Group is focused on planning as it relates to the following areas:

- Health and Safety
- State and Federal Regulations and Guidelines
- Vaccinations/Testing/Distancing/Masks
- Physical Space
- Flexwork Options
- Harvard's Flex Guidelines and Related HR Policies
- Dependent Care and Work Coordination
- Travel
- Transportation (Commuting)

The group will focus on the importance of communication, clear and comprehensive policies, and equity in all of these areas.
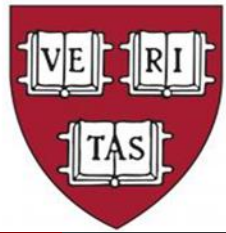
- Currently**, the Harvard-wide Coronavirus Workplace Policies are still in effect.** While we know there will be changes going forward, for now, the policies on HARV*ie* are what you should refer to for now – if you have questions.

- There is a **review underway** of how Harvard's Flex Guidelines will be updated and revised as we move into the summer and fall. Extra attention is being given to *flexibility guidelines* (top priority). Other COVID-19 policies currently being reviewed include *emergency excused absence pay* and *dependent well care days*.
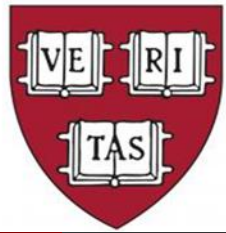
What Staff Need to Know Now

- We are in a **period of transition;** return to campus will not be like "flipping a switch". There are so many dimensions of our lives that tie into our work plans (schedules, transportation, dependent care, schedules, etc.) and everyone's situation is unique to them.

- Returning to campus will elicit different emotions for each employee after a year-plus of living and working differently. All Harvard employees have access to the **Employee Assistance Program (EAP)** and its team of clinicians. More information can be found here: https://hr.harvard.edu/employee-assistance-program

Return to Campus Next Steps

- Group members are planning how best to gather input and perspectives from FAS staff around return to campus guidelines.

- An email address will be set up so that FAS staff can pose questions and share concerns. The group will also be developing an evolving FAQ based on staff feedback.

- We will continue to update the FAS Administration and Finance website with Fall Planning updates: https://adminfindean.fas.harvard.edu/return-campus

Financial Update

Jay Herlihy

Associate Dean for Finance

Nancy Guisinger

Assistant Dean for Finance, Controller

FINReport- The FAS Reporting Application

- We had to replace the database that runs RUFFAS
- We took it as an opportunity to provide financial information to Departments/Centers in a user-friendly web-based system.
- New Financial Reports include information about Plan Working Budget and Forecast from HUBS along with Actuals that is updated on a daily basis.
- Report formats include summary level information by Fund Group and Activity as well as detailed information at the 33 digit level that include Plan Working Budget and Forecast from HUBS as well as Actuals.
- Parameter-driven reports to provide the end user with options. Exportable to MS Excel and PDF.

From RUFFAS

Category	Report
App Security	**Expired Confidentiality Agreements**
App Security	**FAS Admin and Central Financial Security Roles**
App Security	**FAS Fund Deficit**
App Security	**GMAS Security Roles**
App Security	**HCOM Approval Tree**
App Security	**PeopleSoft -Roles, Departments and Approvers**
App Security	**Security - Sign Off Status Report**

RUFFAS	**Fund Terms**
RUFFAS	**Gift Advice**

To FINReport

Expired Confidentiality Agreements Expired confidentiality agreements by department	**Phone Lines by Department** Phone lines by department	**Budget Summary by Fund Type** Income statement by Fund Type	**Change in Net Assets** Statement of activity change in net assets by mega object
Deficit Summary Restricted Gifts, Restricted Endowments and Unrestricted Designated Funds in deficit	**Detail by COA segment** Detail by COA segment	**Expenses by Activity** Expenses for Current Year actuals compared to CFY Budget or Forecast and NFY Budget	**Faculty Start Up Spending** Detail of Faculty Start Up Fund (016110) by Faculty member
Fund Balance CFY projected balances for actuals, budget and forecast	**Monthly Summary** Income statement by mega object by month	**Central and FAS Security Roles** Roles and Permissions for University and FAS Applications for current department users	**GMAS Security Roles** Detail related to GMAS information
PeopleSoft Roles and Departments Detail related to PeopleSoft information	**Time and Labor Group Approvers** Department Time and Labor group approvers	**Fund Terms** Fund terms	

FINReport: Access

- Access is based on the intersection of Role and Org.

- Current RUFFAS users will be transferred to FINReport with the appropriate role.

- APPSEC is updating the Access Security

   Request form for DAs to request

   new or changes to include FINReport.

- Chrome is the preferred browser

ROLE	DEPARTMENT*	FOLDERS AND REPORTS INCLUDED
☐ DEPARTMENT LITE		AUDIT REPORTS: EXPIRED CONFIDENTIALITY AND PHONE LINES
		FUND REPORTS: TERMS AND GIFT ADVICES
		SECURITY REPORTS: ALL SYSTEMS, GMAS DETAIL, PEOPLESOFT DETAIL, TIME AND LABOR APPROVERS
☐ DEPARTMENT ALL		ALL OF THE ABOVE PLUS DETAIL FINANCIAL REPORTS:
		BUDGET SUMMARY BY FUND GROUP, BUDGET DETAIL/CINA, DEFICIT SUMMARY, DETAIL BY COA SEGMENT, EXPENSES BY ACTIVITY, FACULTY START UP SPENDING, FUND BALANCE, MONTHLY SUMMARY

*PERMISSIONS CAN BE SET AT THE DIVISION LEVEL (GIGA ORG) OR DEPARTMENT LEVEL (MEGA ORG) OR INDIVIDUAL ORG WITHIN MEGA

Go Live on March 31st

COMING July 1st

- A new method to adjust salaries in the GL

- Automatically tied to the original transaction

- Includes position, employee, period (including period of work performed) of the original payment

- Captures information correctly for salary journals & makes reporting easier at the University level.

- GL-PCR… General Ledger-Payroll Cost Redistribution

More information to come!!!!!!!
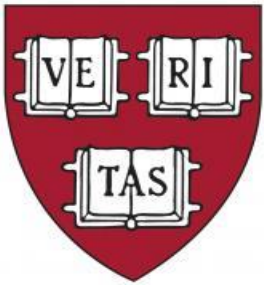
FAS Development Gift Policy

Beth Thompson

Assistant Dean,

Faculty Affairs and Development Planning

Jesse Hergert

Senior Associate Director,

Academic and Development Coordination

Maximize Philanthropy | Deepen Engagement | Recognize Risks

Gift Policy: Navigating the Current Philanthropic and Engagement Landscape

Agenda

ONE | Current Philanthropic and Engagement Landscape

Understanding the realities and complexities of philanthropy today

TWO | Harvard L.E.A.D.S.

Identifying the roles and goals of individuals working in this landscape

THREE | Policy Review

Increasing awareness across relevant members of the internal community

Philanthropic & Engagement Landscape

Understanding the realities and complexities of philanthropy and engagement today

Together, we share collective responsibility to manage to University Gift Policy, honor our donors—past, present, and future—and protect Harvard from actively engaging individuals and organizations who might jeopardize the reputation, funding, and/or relationships of our institution.

Admissions

Athletics

Foreign Entities

Questionable Entities

Harvard L.E.A.D.S.

Identifying the roles and goals of individuals within the dynamic philanthropic and engagement landscape

L

LEARN

In the context of your work, learn as much as you can about donors/volunteers. Recognize specific triggers for further research. Work with FAS Development to investigate and flag them appropriately.

E

EVALUATE

Based on what you have learned, evaluate what actions may be appropriate. This may include conducting or requesting further research, engaging a manager, the FAS Development Office, or the University Gift Policy Committee.

A

ACT

Take the best action based on your reasonable assessment of available information and/or the guidance of others you consulted. This may include recommending the relationship with Harvard be discontinued.

D

DOCUMENT

Work with FAS Development staff to document any relevant information, discussions, and actions. Use documentation to move away from a culture of discretion and into a culture of diligence.

S

STEWARD

If an ongoing relationship with the donor or volunteer is maintained, steward them strategically and continue to monitor any potential concerns as the relationship continues.

New Policy:

Engaged and Prospective Donor and Volunteer Review (EPDVR)

University development staff, faculty, and administrators are responsible for knowing and adhering to restrictions on prospective donor cultivation, gift acceptances, and volunteer engagement that may be related to perceived conflicts and restrictions governed by local, state, and federal legislation or Harvard University policy. These restrictions include policies pertaining to the solicitation of gifts from donors while they have a family member applying for admissions, gifts that might be construed as advancing a donor's business interests rather than the interests of the University, and gifts that would pose substantial risks to the University, whether due to the source or purpose of engagement or funds. The University will decline to pursue or accept donations that are inconsistent with the considerations that are outlined in the *Gift Policy Guide*.

New Policy:

Gifts From Relatives of Applicants

All those engaged in fundraising on behalf of Harvard University will not solicit gifts, except routine annual fund and reunion gifts or those which follow previous individual giving patterns, from donors and prospective donors whom they know to have a relative or child who has applied to or who is actively considering applying for admissions to Harvard University. If the prospective student applies, no solicitation will take place until a final admissions decision has been made—or until after the conclusion of that year's admissions cycle (July 1).

Occasionally, an unsolicited gift might be proposed by a donor or prospective donor while a relative is simultaneously considering admissions to Harvard. The individual should be advised that any gifts to the University should not be made, or conversations about potential future gifts should not occur, until after the admissions cycle has concluded, so as not to compromise the integrity of the admissions process.

The same guidelines and principles apply to all members of the Department of Athletics.

# Additional New Policy for Faculty Awareness:

Gifts To Self

Covered Individuals are prohibited from making a gift of personal funds, either individually or through a foundation or donor-advised fund, that is restricted to support their work, or that otherwise will be held in a fund or account that they effectively control. While Covered Individuals are not prohibited from making gifts to their department, such gifts must be subject to independent expenditure oversight and may not be used to pay for the Covered Individual's or any direct report's compensation or fringe, nor for consumer goods used by the Covered Individual, nor for the Covered Individual's travel costs or other expenses with a significant personal element. (The term Covered Individual as used in this policy includes all faculty, researchers, and staff of the University, as well as their immediate family members.)

The prohibition in the preceding paragraph may be waived, on a case-by-case basis, with the prior written consent of the department chair, School dean, and Office of the Provost, who may impose additional conditions. Generally, in such a case, however, the gift will not be regarded as tax-deductible and the University will not issue a gift receipt.

Resources

FAS Development Office Colleagues

- **Beth Thompson***:* beth_thompson@harvard.edu

- **Jesse Hergert:** jesse_hergert@harvard.edu
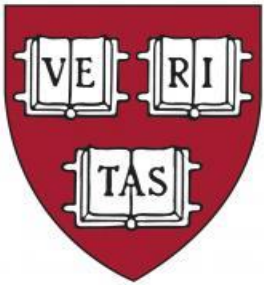
Automated CPR Process
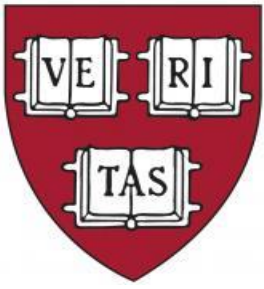
Lauren Szufat

Aurora Product Manager, HUIT

The Critical Position Request Moves Online!

An Introduction to the Position Request Portal

On April 19, 2021, the **Critical Position Request** process will move to a dedicated new application: the **Position Request Portal (PREP)**

- **Users of the PREP application** will include participants in the current CPR process:
  - Department-level administrators and their delegates
  - HR Consultants
  - Budget Analysts
  - Divisional Administrative Deans
  - The Dean for Administration and Finance
  - The FAS Dean

- **Application features** include:
  - A CPR form with:
    - Data populated from institutional sources
    - Conditional logic and security on fields based on adjustment type, user roles, and form data
    - An automated workflow based on user roles/permissions with public and secure workflow notes
    - Attachments functionality
    - An Outcome section with approved position information and an earliest action effective date
  - Application security that uses a combination of PREP and Aurora roles and permissions
  - A Dashboard for viewing/acting on requests and for basic reporting
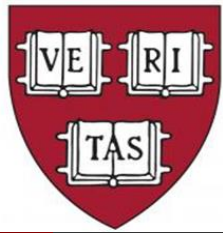 - An FAS Dean Dashboard for approving requests

- **Application Benefits** include:
  - Process simplification
  - Greater transparency into statuses/outcomes/decisions
  - Data security, and improved data integrity
  - Improved reporting capability
  - Enhanced oversight

- **Learn more**:
  - Visit the Aurora Knowledge Center (https://about.aurora.fas.harvard.edu/) to find information about upcoming sessions:
    - A demo on Tuesday, March 30, from 2-3pm
    - A demo on Thursday, April 1, from 1-2pm
    - A user acceptance testing session on Tuesday, April 6, from 1-5pm.
  - Visit the FAS HR site (https://hr.fas.harvard.edu/) to learn more about the Critical Position Request process overall.

- **Special thanks** to the project Working Group: Jennifer Callahan, Tracie Cole, Kirsten Colton, Sarah Elwell, Chuna Keophannaga, Maggie Lopes, Jessica Manning, Heather McCormick, Pat McVay, Denise Oberdan, Eimy Osaki, Eva Rivas, Damari Rosado, Elise Sacchetti, Valerie Sacchetti, Monica Tesoriero, Mary Trainor, Kim Zweig

Fostering Community Tools website

Annie Rota

Director, Academic Technology Group

Update: Tools for Remote Teaching & Community

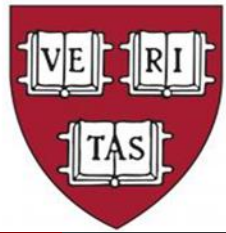|	Teaching & Learning	Community & Events
Use cases	• Robust online discussion • Virtual office hours • Media-rich assignments • Lab simulation • Collaborative whiteboarding	• Virtual events • Activity fairs • House communities • Career Services cohorts
Existing tools	• Zoom • Microsoft Whiteboard/Google Jamboard	• Zoom • Engage • Scheduler • Canvas
Investments & pilots	• Ed Discussions • VoiceThread • Labster • Congregate.live	• Congregate.live • Remo
Learn more	atg.fas.harvard.edu atg@fas.harvard.edu	https://fosteringcommunity.fas.harvard.edu/ Events: ess@fas.harvard.edu Tools: admincmp@fas.harvard.edu

Administrative Systems Update & Support

Stephanie Nasson

Senior Director of Administrative Operations
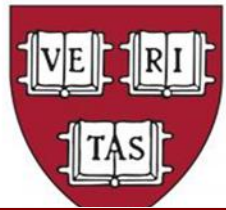
Administrative Systems Roadmap/Landscape

FY 21 Recently Completed/ Updated Projects	FY 21/22 Projects Underway	What Comes Next…
• **Buy2Pay** – New UI went live March 15 • **New [AP forms](#) available:** Homeland Security, In Lieu Of, Deposit/Pre-payment	• **Position Request Portal** – Go-live April 19 • **HART migration to OAS** – April 12 • **SNOW Lite for Phone Billing** – Go-live April 1 • **Yoh MSP** – Go-live June 7 • **File Share** (individual drives) Final reconciliation	• **Buy2Pay** – Approver edit ability in April! • **AD Security Update** • **Mac OS upgrades** • **File Share Departmental Drives** – *optional* assessments for interested depts.

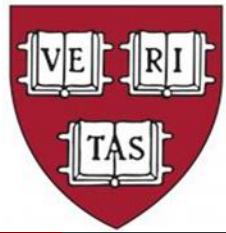# Finance Fundamentals – Remaining sessions

Register for classes on the Harvard Training Portal at TrainingPortal.Harvard.edu:

Finance Fundamentals IV - Monitoring Funds: Tuesday, April 6 – 10:00am - 12:00pm

Finance Fundamentals V - Maximizing Funds: Tuesday, April 27 – 10:00am - 12:00pm

Finance Fundamentals VI - Mastering Procurement: Tuesday, May 11 – 10:00am - 12:00pm

Additional trainings

- Yoh Brown Bag sessions:
  April 14th – 3-4pm
  April 27th – 11-12pm
  April 28th – 3-4pm

- Admin Ops/ASAP Steady State:
  - PeopleSoft Overview – March 30th , 1:30 – 3:00
  - Concur Tips & Tricks - April 5th, 1 – 3:00
  - FINReports Brown Bag, April 8th, 10 – 11:30
  - Aurora Lookup & Reporting - April 12th, 1 – 2:30
  - General Ledger/Journals – April 13th, 10 – 11:30

- Please check Admin Ops website or HTP for more details!