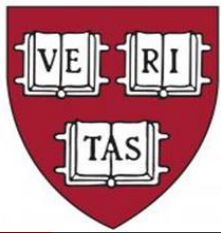


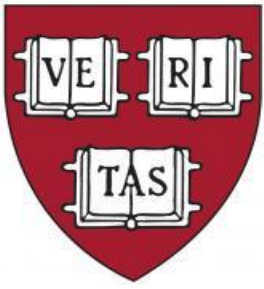
**Administrators' Town Hall will  
be starting soon...**



# Rules of the Road

- **Attendees** are asked to **stay on mute** with **video off** to preserve meeting bandwidth
- 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 **not** 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 be mindful that while the chat is monitored, we may not be able to respond to every question during 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**

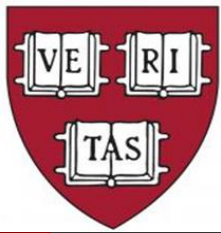
**November 17, 2022**  
**Zoom**



# Welcome

**Scott Jordan**

*Dean of Administration and Finance*



# Agenda

## **Welcome**

Scott Jordan

## **Financial Updates**

Scott Jordan, Jay Herlihy

## **HUIT & Education Support Services**

Jenn Vasconcelos, Annie Rota, Andrew Ross

## **Global Support Services**

Krister Anderson, Matt Etre

## **Human Resources**

Tiffany Jadotte

## **Physical Resources and Planning**

Zak Gingo

## **Administrative Operations**

Mary Ann Bradley, Sean McQuarrie,  
Maureen Berry, Stephanie Nasson

## **Closing**

Scott Jordan



# Financial Updates

**Scott Jordan**

*Dean of Administration and  
Finance*

**Jay Herlihy**

*Associate Dean for  
Finance*



# **FY22 FAS Financial Results**

**Administrators' Town Hall  
November 17, 2022**

Scott Jordan – Dean for Administration and Finance

# Agenda

---

- ☐ Review FY22 Results and Reserves
- ☐ Review Economic Budgeting Model
- ☐ Reflect on Financial Position



# Highlights and Key Updates

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**We ended FY22 with a surplus**

**FAS (excluding SEAS) local reserve balances rose to \$706M**

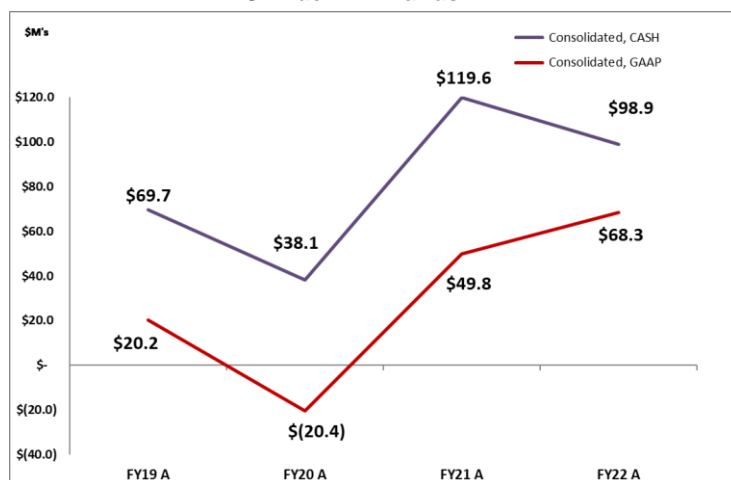
**Key Drivers:**

- **Endowment**
- **Lower than anticipated spending**

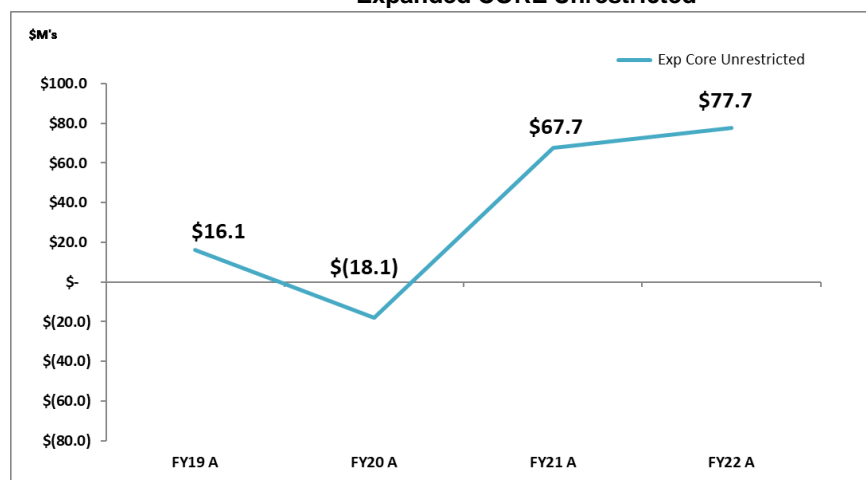


# FY22 Results – excluding SEAS

FAS Wide – All Funds



Expanded CORE Unrestricted\*

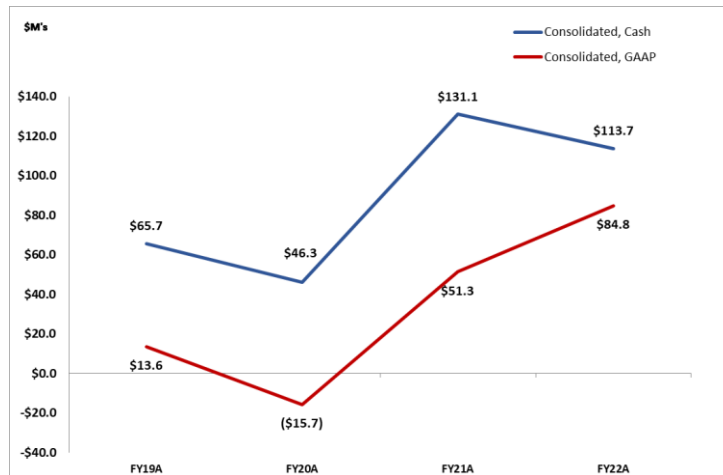


- We ended FY22 with a surplus - measured in all views (see Consolidated, Cash; Consolidated, GAAP and Expanded CORE Unrestricted above)
- Key Drivers of Surplus: increased revenue from endowment, lower than planned growth in expenses
- Other factors contributing to these results included:
  - Higher College enrollment (\$6M increase in net tuition from traditional enrollment budget)
  - Larger royalty distributions (\$21M increase over FY 21)
  - Lower than typical spending as the school adjusted to post pandemic operations (\$6M less than overall budget)

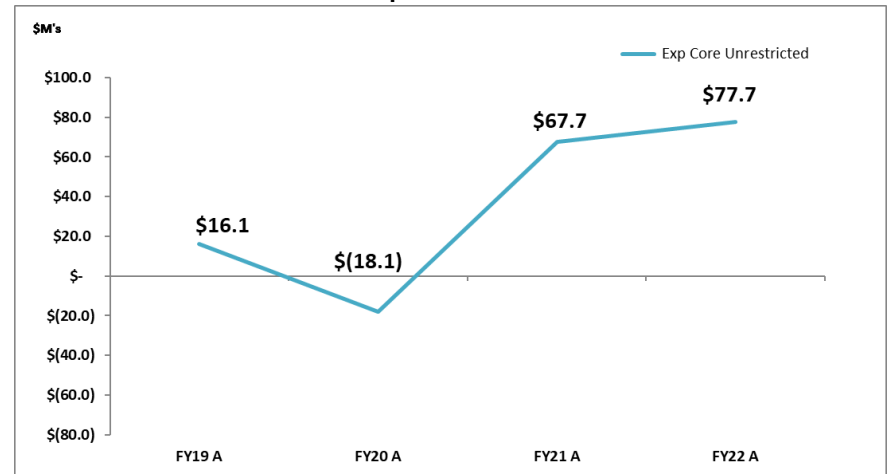
\*Expanded CORE data exclude operating results from affiliated tubs including HCL, Athletics, Museums, SEAS, DCE and DOAKS

# FY22 Results – including SEAS

Consolidated – All Funds



Expanded CORE Unrestricted\*



\*Expanded CORE data exclude operating results from affiliated units including HCL, Athletics, Museums, SEAS, DCE and DOAKS

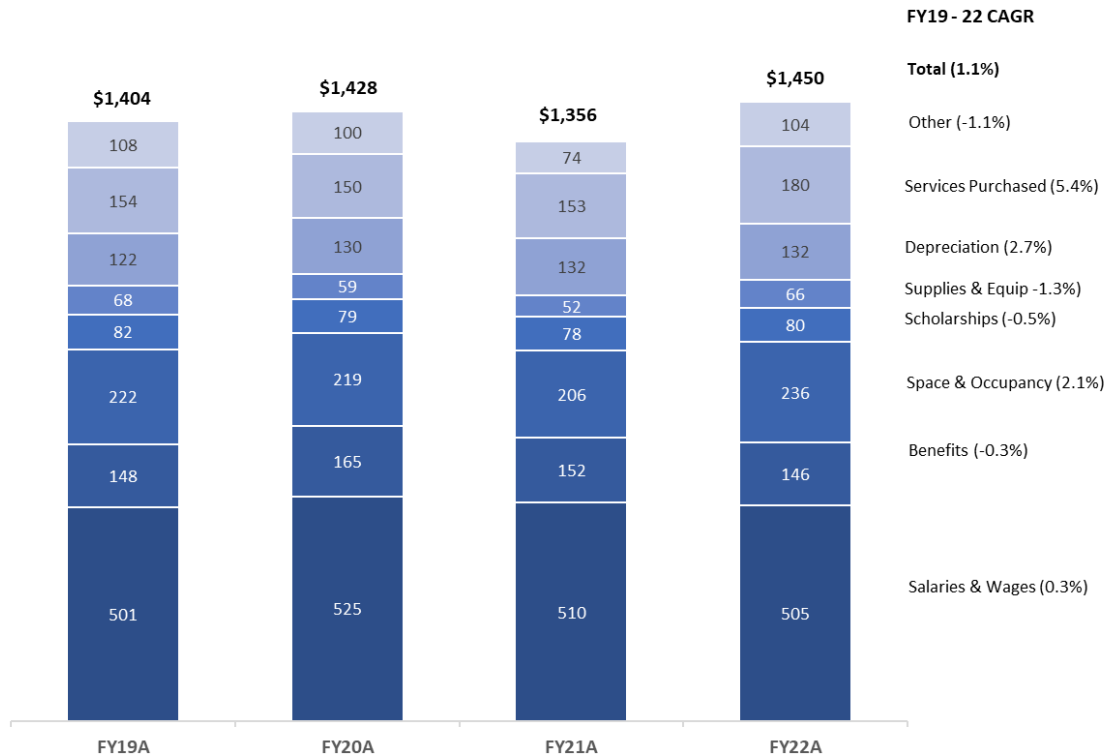
# Revenues FY19-FY22



## Key Drivers:

- **Endowment** increased
- **DCE Revenue** declined
- **Net Tuition** and **Board and Lodging** increased due to larger enrollment

# Expenses FY19-FY22

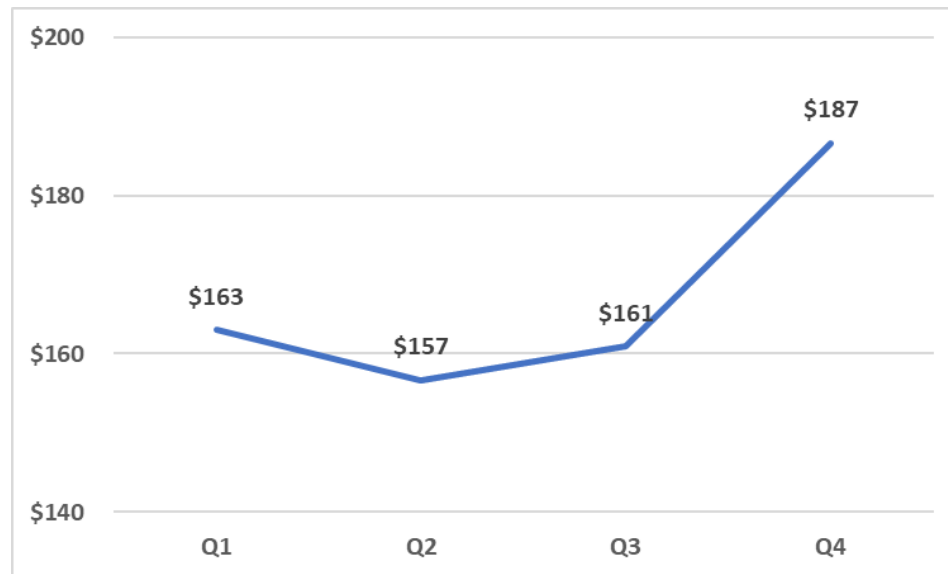


## Key Drivers:

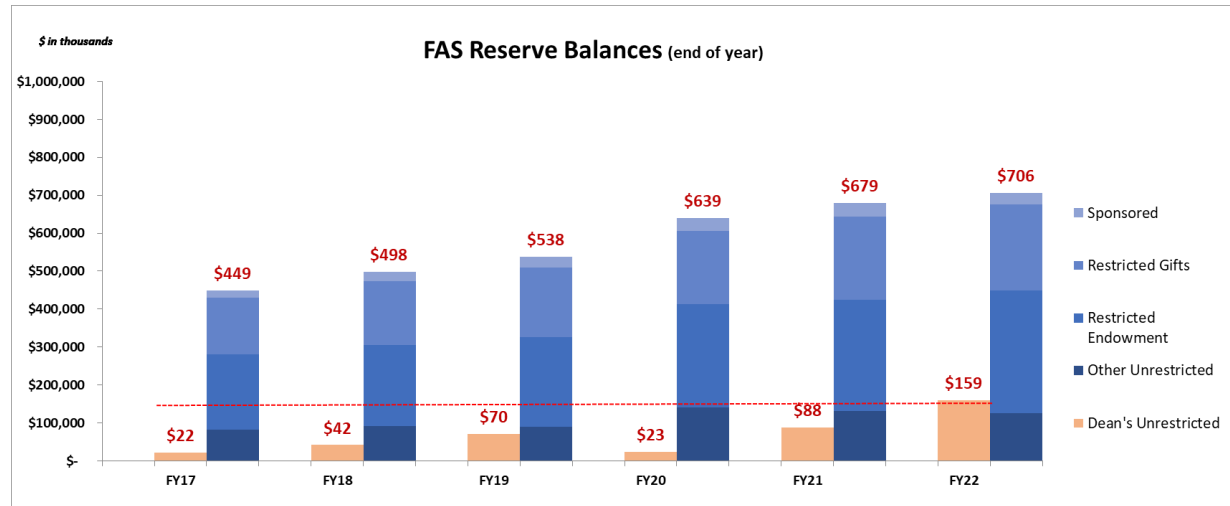
- Lower than Planned Growth in Salaries & Wages
  - 0% annual increase for FY21 and 2.5% for FY22 for exempt and faculty
  - Vacancies from VERIP
  - Tight labor market
- Non-Compensation expenses increased \$105M (15%) as programmatic activities resumed
- \$15.6 M in COVID Expenses (isolation housing, testing, masks etc.)

# FAS Non-Compensation Expenses

- **Non-Compensation Cash Expenses** for FAS totaled \$667M, an increase of \$105M or 15% over FY21. As displayed below these expenses grew significantly during the fiscal year, as activity returned to campus.



# FAS Reserves Reached 10% of the FY23 Budget



- **For the first time, the FAS has met the University's flexible reserve threshold of 10% as represented by the red line above.**
  - The FY22 surplus increased the Dean's Reserves to \$159M
- **Locally controlled reserve balances have increased to \$706M or 46% of the FY23 Budget**
  - Reserves have grown 58% over the past five years
  - As recommended by the FAS Study Group, we have hired a Strategic Director of Endowment and Gifts to work with units on how to invest these balances to meet the strategic and sustainable goals of the school and the local unit.
- **Local units have commitments from the Dean for funding such as the community renewal fund that have significant unspent balances**
  - FAS Finance will work with Ad Deans and TFOs to ensure these balances are spent as planned

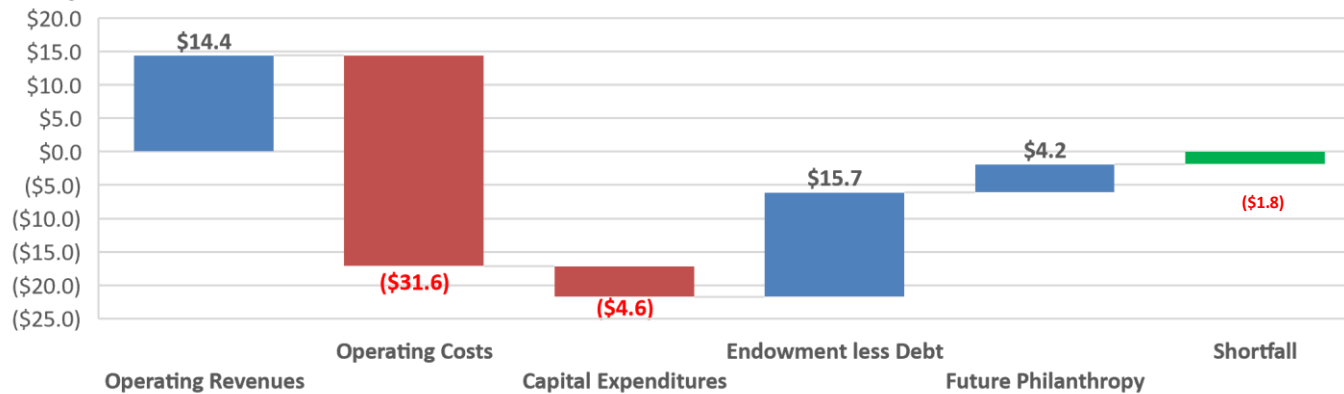
# Economic Budgeting Model

- At April 2021 Town Hall we shared a **new financial model** to understand our long-term financial condition and noted that FAS faces a substantial “structural” budget deficit.
- The most recent update of the model in June 2022 included **positive HMC results** for year ending July 2021 (+33.6%) and inflation adjustments. As a result of these adjustments, the structural deficit is narrowed significantly to \$630 million or \$31.5M per year.
- Model will be updated to include FY22 HMC results and updated inflation assumptions ***which will likely show a larger structural deficit.***
- Irrespective of the precise magnitude of **our structural deficit**, the tools developed by the Economic Budgeting Group are useful in orienting planning around making **good long-run strategic choices**—not overly influenced by year-to-year vagaries or accounting choices.

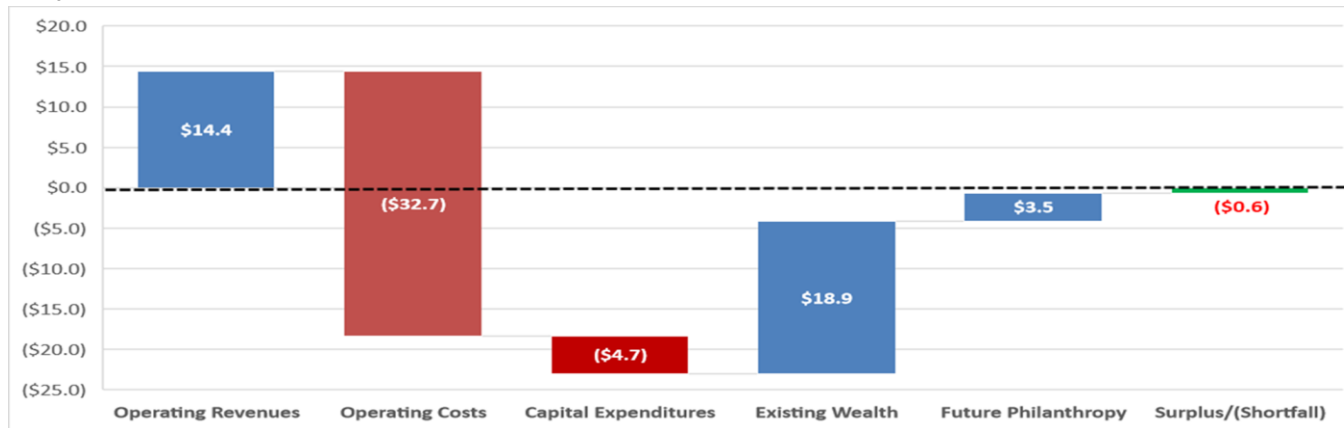


# Economic Budgeting Model Comparison

## Original Model



## Updated Model



# Reflections on FY22 and Beyond

- **At this moment, FAS is fiscally healthy.** We ended FY22 with a surplus and with reserves at the 10% threshold for the first time.
- Our fiscal health is driven by things that we can control and things that are outside of our control.
  - Outside of our control – endowment returns, COVID impact, inflation
  - Within our control – fundraising, compensation, space use, DCE enrollments, management of local funds
- For FY23 we will need to carefully monitor those factors outside of our control and be thoughtful about those that we control.
- While the University is in a healthy financial position, market volatility and a potentially looming recession require us to be financially prudent and prepared for a downturn.

# Questions?





# Active Directory Update

**Jenn Vasconcelos**

*Senior Program Manager, HUIT*



# Active Directory Update - Overview

## Active Directory (AD) Migration Summary

What?	Migrate to a new security platform (the University Active Directory).
Why?	Computer and account security are a priority for Harvard. We are consolidating enterprise systems and groups to strengthen IT security and reduce the risk of data compromise.
Who?	<p>FAS faculty and staff Windows users and Windows PC workstations that have been identified as requiring the update.</p> <p>*Macs, tablets, and mobile devices do not require this security update.</p>
When?	Calendar year 2022
Benefits	<p>Strengthen Harvard University's security and reduce the risk of compromise to accounts and computers</p> <p>Simplify the logon process by using your HarvardKey to access your computer, network drives, and more!</p>



# Active Directory Update – What to Expect as a User

**Duration:** Approximately 1 hour

**Before:**

- *September – November:* Users have received emails from HUIT\_ActiveDirectoryProject@harvard.edu providing migration details and an invitation to schedule a convenient migration time
- *December:* Users will receive an assigned migration appointment time
- *At least 1 day prior to your appointment, connect to the University's virtual private network (VPN) for a minimum of 30 minutes to allow your computer to check in and register for the update.*

**During:**

- After connecting to VPN, you will be prompted to enter your HarvardKey password, and the computer will reboot after 15 – 30 minutes

**After:**

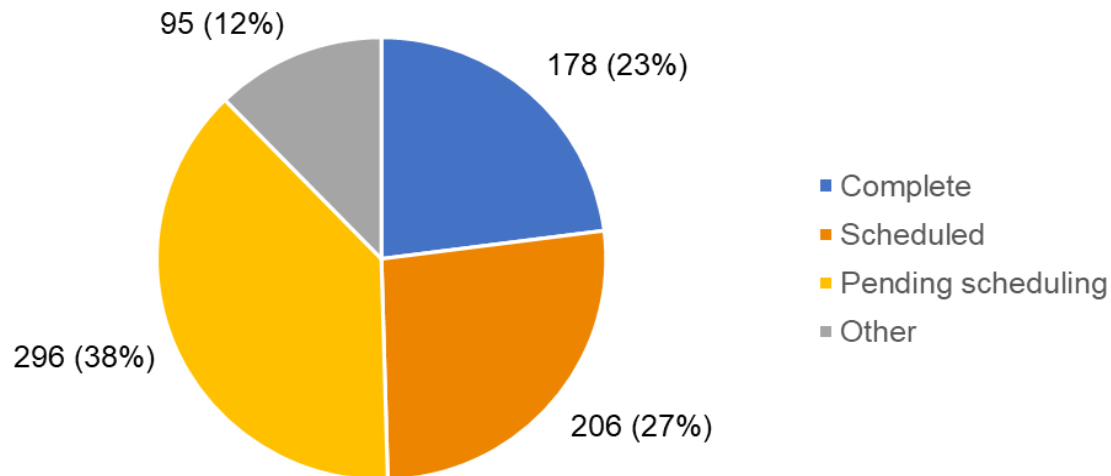
- Log in to your computer with your HarvardKey credentials to:
  - Verify all is working as expected
  - Log in to applications which require HarvardKey (Zoom, Office 365)
  - Re-enroll in Harvard networks (Harvard Secure wireless)

**Need help?** The HUIT Service Desk will be available at 617-495-7777 and with a dedicated call option (#) for assistance with your Active Directory security update as well as our migrations team.



# Active Directory Update – User and Computer Migrations

FAS AD User and Computer Migrations



- Total computers = 775
- Key dates
  - 11/22/22 – Last appointment day for self-selected AD migration appointments
  - 12/01/22 – Migration appointment assignments begin
  - 12/31/22 – FAS computer migrations are complete



# Active Directory Update – File Share Updates

- **What:** The **HMSC** and **Lamont Media Lab** file shares will be migrated from FAS AD to University AD
- **When:** Friday, November 18<sup>th</sup> 10pm – 11pm
- **Impact:** There will be no access to the network share drives or folders during the migration window

<b>File Share Server Name</b>	fas-dsft10-s-01
<b>File Share Names</b>	HMSC LAMONT-MEDIA-LAB
<b>Path Names</b>	/vol/hmsc /vol/lamont_media_lab

- **Upcoming:** Migration dates for 4 additional servers with department file shares will be coordinated and scheduled with contacts/owners over the next few months to enable FAS AD to be fully retired on schedule





# Lecture Recording Retention

**Annie Rota**

*Director of Academic Technology for  
FAS, HUIT*

**Andrew Ross**

*Senior Director for Teaching  
and Learning Support, ESS*



# Lecture Recording Retention Policy Change

## What is Panopto?

Panopto is the HUIT-supported video content management system that integrates with Canvas and Zoom. It automatically routes **classroom lecture capture** recordings to folders linked within Canvas course sites, and course staff can record and upload other videos.

## What is changing?

Starting in January 2023, every January and June, course recordings **2+ years old** will be archived, and archived recordings **4+ years old** will be deleted.

## Who is impacted by this change?

~**70 FAS courses**/semester create lecture recordings

Used for student review, missed class sessions, and simultaneous enrollment

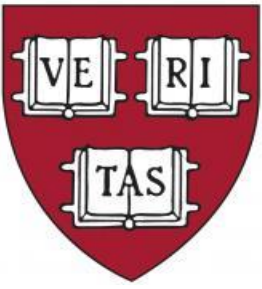
## Why do we need to manage video retention?

Security and privacy best practice to limit risk of exposure of old, unused content

Costs are increasing; content is rarely used after the semester

## What if there are videos that courses need to reuse?

Consult with [Academic Technology](#) on how to store videos for reuse



# Global Support Services Overview

**Krister Anderson**

*Senior International Program  
Consultant*

**Matt Etre**

*Associate Director for  
International Safety & Security*

HARVARD GSS

# PARTNERING FOR INTERNATIONAL SUCCESS

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HARVARD  
Global Support Services



PHOTO: DARRELL HUANG '20, FRANCE

Harvard Global Support Services (GSS) offers international travel, research, and program support for students, faculty, staff, and academics across Harvard's Schools, departments, and centers.

Since 2011, we have helped the Harvard community minimize risk, manage complexity, and maximize the impact of their international travel and activities.



SAFETY AND  
SECURITY



HEALTH



CULTURE



INTERNATIONAL  
SOS



OUTBOUND  
IMMIGRATION



EMPLOYMENT



FINANCIAL AND  
LEGAL MATTERS



RESEARCH CENTER  
OPERATIONS



Visa guidelines and documentation requirements can vary from country to country. Our resources help enable smoother travel, simplified logistics, and peace of mind.

#### KEY CAPABILITIES AND SERVICES

- Advice and resources for expedited processing of outbound visas and U.S. passports
- Proof of evacuation coverage
- Guidance on transport of technology, equipment, biological samples, and cash across borders

→ Processing delays due to COVID – apply early!

→ Check your passports!



Harvard Global, our affiliated nonprofit legal entity, provides a suite of fee-for-service operational capabilities.



#### KEY CAPABILITIES AND SERVICES

- Establishing overseas offices and entities
- Employment and payroll
- Receiving and managing grants to fund research activities in US and abroad
- Mechanisms for tax-efficient giving from donors abroad

→ 11 entities in 8 countries

→ Expanding capabilities to hire and/or receive gifts and grants—particularly in EU, UK, and India







Increasing complexity is calling for further planning ahead – disruptions to processes that were once standard are now becoming more common.

#### KEY AREAS OF FOCUS

- Visas – appointments are limited, and biometric requirements are increasing
- Hiring/HR – renewed focus by governments on appropriate engagements
- Shipping – customs regulations are tightening up.

→ Start government processes as soon as possible.

→ Make local connections where possible.



We help our clients stay safe and travel smart, no matter where they're headed.

#### CORE PROGRAM OBJECTIVES

- **Pre-departure client engagement:** orientations, briefings, consultations, and assessments
- **Country program and center awareness:** country, program, and site familiarization visits
- **Emergency response program:** manage IEMT and International SOS vendor relationship



Pre-travel preparation and awareness are key—even for the well-traveled—and we can help you make informed decisions.

- Research and consider country-specific factors in the context of your identity, in-country activities, and familiarity with the country and its culture
- Anxiety and mental health concerns when traveling
- Consider the potential impact of global events on your safety and security
- Continue to research COVID entry and exit requirements: vaccination, testing, quarantine





International SOS is our vetted partner for emergency response. Their medical, mental health, and travel security services are available to eligible students, faculty, staff, and researchers who are traveling or working overseas on behalf of Harvard.



## KEY CAPABILITIES AND SERVICES

- Routine and emergency advice, assistance, and evacuations
- 24/7 hotline: [+1-617-998-0000](tel:+1-617-998-0000)
- Travel registration: [globalsupport.harvard.edu/mytrips](https://globalsupport.harvard.edu/mytrips)
- Proactive incident communications
- Member portal: country guides, COVID trip planner, and alerts
- Mobile app (iOS, Android): trip registration, country guides, alerts, COVID trip planner, and real-time check-in and chat

→ Trip registration required for all Harvard affiliates now

→ Proof of registration required for reimbursement

Find out more about how GSS can help get you where you want to be.

CONTACT US

+1-617-495-1111

globalsupport@harvard.edu

globalsupport.harvard.edu

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EMERGENCIES ABROAD

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Mobile app

International SOS Assistance app

Available from the Apple App and Google Play stores



# HR Updates

**Tiffany Jadotte**

*Associate Dean for FAS Human  
Resources*



# Dynamic (or Hybrid) Work Survey

- Communication will be sent to FAS staff with survey link on November 28<sup>th</sup>
- The survey response deadline will be December 12<sup>th</sup>
- The survey questions were developed in partnership between the Dynamic Work Strategies Tiger Team and Harvard College Institutional Research (HCIR).
- We encourage all benefits-eligible FAS staff to take this survey regardless of how or where they work as it will give us a better sense of how hybrid work is taking place across the FAS.
- The survey is anonymous and any identifying information shared by respondents will be omitted from the survey summary.



# Dean's Distinction Update

- Dean's Distinction will return in 2023 after being on hiatus since 2020 due to the COVID-19 pandemic. Additional information was included in the FAS Reporter issue from November 10.
- The nomination period for Dean's Distinction will open in early January 2023 and run for two weeks.
- Staff members from departments and units across FAS have been nominated to serve on a committee to read nominations and choose final Dean's Distinction recipients.
- All FAS staff will be invited to a celebration in Spring 2023 where the Dean's Distinction recipients will be honored.
- Please see the FAS HR website for more information:  
<https://hr.fas.harvard.edu/deans-distinction>





# Salary Equity Review

- The FAS has completed its second annual salary review of all non-union employees' salaries (approximately 1,400 staff). This included all benefits-eligible staff (part- and full-time), but no LHTs or temporary workers.
- If approved to move forward by FAS senior leadership, the administrative leadership of each of the divisions will be receiving a list of employees in their divisions who are currently below their relevant ranges for their review
- The goal is to have any salary changes based on the analysis effective in January 2023.



# FAS HR EDIB FYE (For Your Education)

## The December Dilemma

- The December Dilemma is that time of year where multiple holidays collide and people with good intentions can find themselves in the middle of potentially toxic misunderstandings. This phenomenon occurs in workplaces across America and can also have an impact on global workplaces.
- Many holidays take place throughout the fall and winter. Since many holidays fall on different dates each year, it's important to refer to interfaith calendars like the Anti-Defamation League's: <https://www.adl.org/education/resources/tools-and-strategies/calendar-of-observances>

## The December Dilemma Checklist ([Full listing](#))

- Review your Policies
- Be Curious and Ask Respectful Questions
- Avoid Scheduling Mishaps
- Celebrate Inclusion



# Heating Season Reminders

**Zak Gingo**

*Associate Dean for Physical  
Resources and Planning*



# Administrative Operations Initiatives

**Mary Ann Bradley**

*Associate Dean for  
Administrative Operations*



# Administrative Operations Initiatives

## Upcoming Projects *Q2 2023 – Q1 2024*

### Current *Q2 2023*

- AD Migration
- Dynamic work strategies survey

### On Deck *Q4 2023*

- Phone infrastructure upgrade

### Upcoming *Q3 2023*

- PCard reconciliation in Concur
- FileShare Department migrations to SharePoint

### Future *Q1 2024*

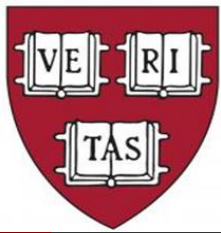
- eShip Global in B2P
- Electronic I-9
- FAS Data Hub
- Jabber softphone discovery
- Crimson Print
- Crimson Fax – add'l tubs



# Concur PCard Settlement Transition

## PCard Settlement System to Concur Settlement System

<b>What?</b>	The University will be moving PCard reconciliation from the Settlement System to Concur, our existing reimbursement and Corporate Card settlement system.
<b>Why?</b>	The current PCard Settlement System technology has reached the end of its useful life and needs to be replaced. Concur, the University's current system for employee reimbursements and Corporate Card reconciliations was selected to replace the PCard Settlement system.
<b>Who?</b>	Current PCard cardholders, PCard reviewers, and local department administration will be impacted by this change.
<b>When?</b>	PCard reconciliation will cut over to Concur on January 30, 2023.



# Concur PCard Settlement Transition Benefits



Implementation of a fully electronic system with automated workflows



Deliver a requested solution to create University wide best practices



Deliver tool that provides utility for stakeholders and end users including some mobile device capabilities



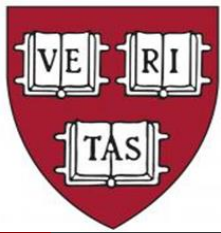
Introduce the ability to attach receipts



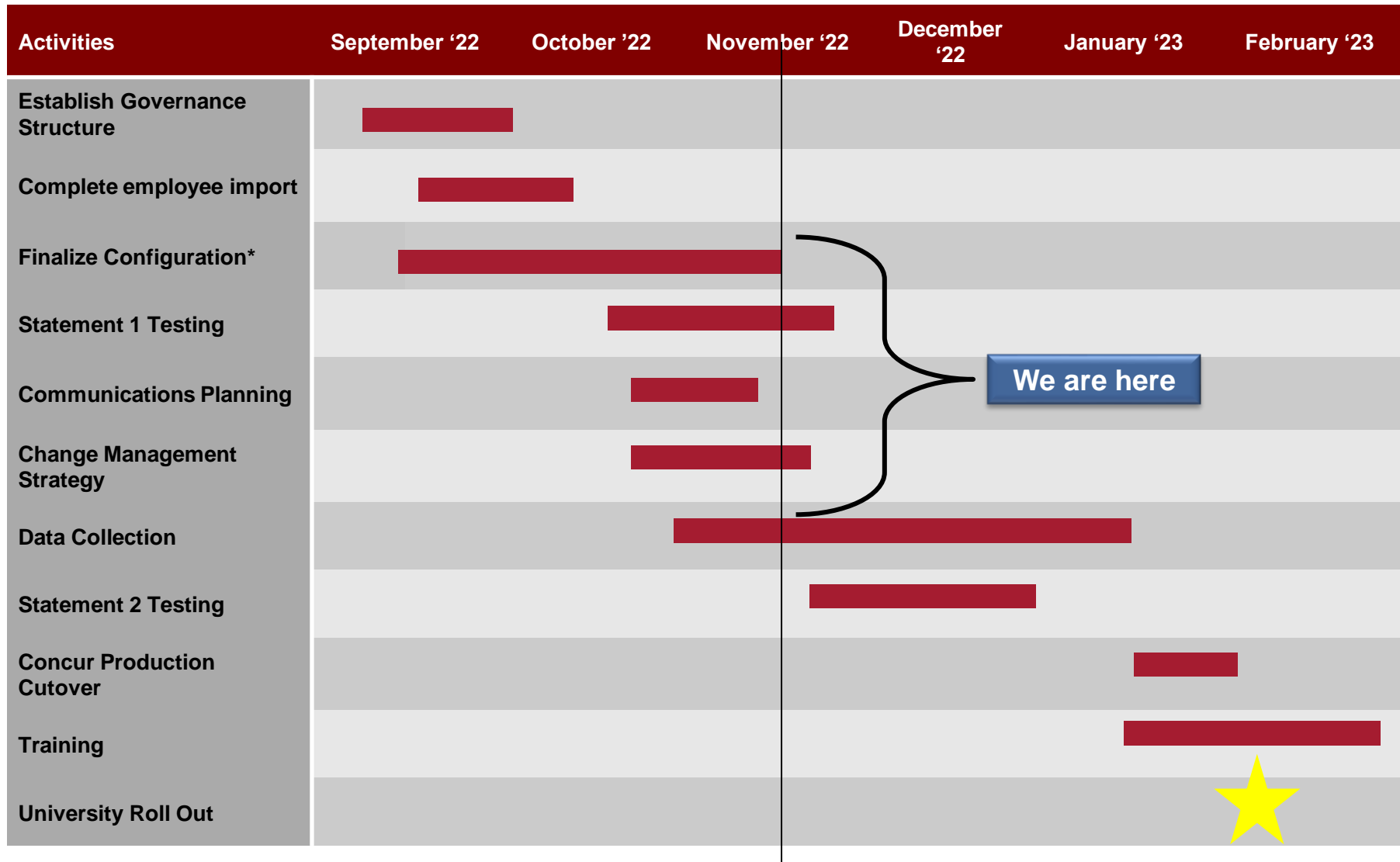
Systematized business/audit rules reflecting the PCard Policy



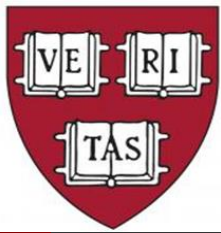
Introduce a consistent platform for processing all card transactions (Concur)



# PCard to Concur Transition Project Timeline







# PCard to Concur: What you need to know

- **Engagement Opportunities**

- Discussed in P2P council, eNews, [Fact Sheet](#) and initial information sent earlier this month
- Current UAT participants: CCB, OEB, Physics, SCRB, GSAS, College
- Next UAT: early December
  - Email Josh Dunn, [dunn@fas.harvard.edu](mailto:dunn@fas.harvard.edu), if you would like to be in the next round of testing in mid-Dec.

- **PCard Holder Communication:** Monday, November 21

- **Concur PCard Brown Bags:** Early December 2022

- **Go-live:** January 30, 2023

- **Training, Resources & Support:** January – March 2023

- **Concur Office Hours:** Mondays & Wednesdays 11 – 12pm; Fridays 11 – 12pm starting 02/03/23 - [Zoom online meeting](#)
- **Admin Ops Office Hours:** First Friday of the month, 11 – 12pm – [Zoom online meeting](#)



## ***New hire & Central I-9***

## Automatic feed

## Automatic feed & DA

**Personal Information**




Title:  Suffix:   
 First Name:   
 Middle Name:   
 Last Name:   
 National ID:   
 Date of Birth:    
 Gender:   
 Military Status:

**Home Address**



Country:   
 Address 1:   
 Address 2:   
 Address 3:   
 City:  State:

☒ Mail ☐ Home Address ☐ University mailing Address


### Personal Information

HUID	42116858
First Name * †	<input type="text" value="John"/>
Middle Name	<input type="text"/>
Last Name * †	<input type="text" value="Harvard"/>
Suffix	<input type="text" value=""/>
Date of Birth *	<input type="text" value="05/05/1986"/> 
Gender * †	<input type="text" value="Male"/> 
SSN * †	<input type="text" value="765-98-7653"/>
Retype SSN * †	<input type="text" value="765-98-7653"/>
Citizenship Status	<input type="text" value="US Citizen/Permanent Resident/Non Res Alien Working Abroad"/> 
I-9 on file	<input type="text" value="No"/>
Visa Type & Expiration	
Hispanic/Latino *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Ethnicity *	<input type="checkbox"/> American Indian/Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black/A <input type="checkbox"/> Native <input checked="" type="checkbox"/> White
Default Mailing Location *	<input type="radio"/> Home Address <input checked="" type="radio"/> University Mailing Address

### Home Address

Country * †	<input type="text" value="United States (USA)"/> 
Address * †	<input type="text" value="Massachusetts Hall"/> <input type="text"/>
City * †	<input type="text" value="Cambridge"/>
State * †	<input type="text" value="MA"/> 
Postal Code * †	<input type="text" value="02138"/>

### Email

<input type="text" value="Add Email"/>	
Type	Email Address
Secondary	<input type="text" value="JohnHarvard@gmail.com"/> 

### Telephone

<input type="text" value="Add Phone"/>
--



# Electronic I-9 Project Benefits



Improves University data security by creating a direct feed between Equifax I-9 and Peoplesoft



Standardizes I-9 processing across the university, including e-Verification of all new hires

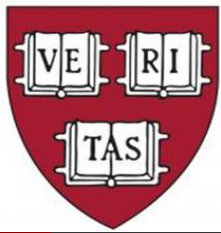


Reduces administrative burden by moving I-9 processing to a central group, and directly feeding hiring data into Aurora hiring forms

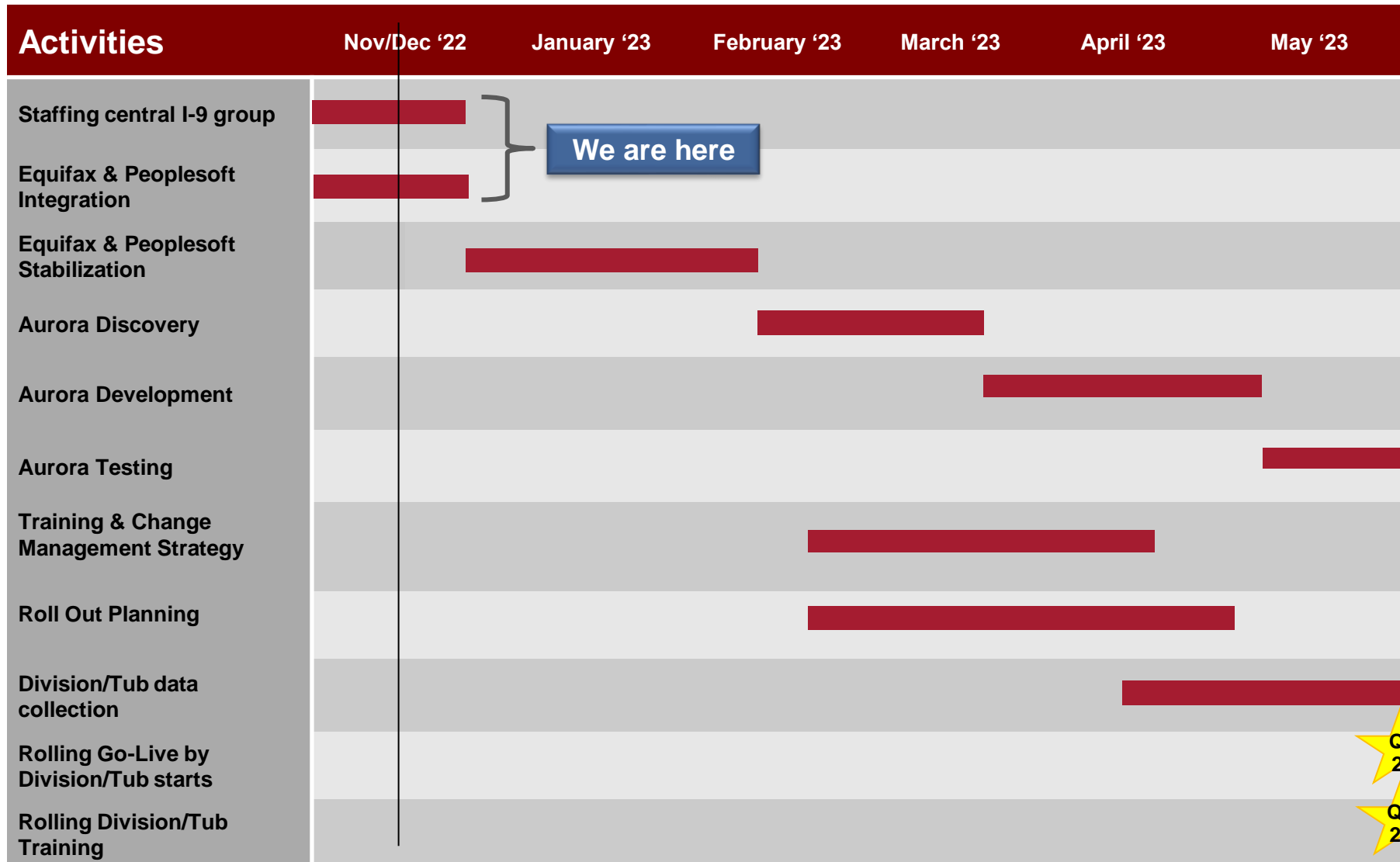


Creates a hiring process that doesn't rely on learning & using a new system to perform hiring actions

Moving to Electronic I-9 is a firm cut-over. Once a Division/Tub moves to Electronic I-9s, no more paper I-9s can be processed locally.



# Electronic I-9 DRAFT Project Timeline





# More in January 2023!

The Administrative Operations ASAP Team is pleased to once again be offering a full round of Finance Fundamentals with all six sessions.

These trainings are free and open to all FAS staff members with financial responsibilities\*. You can attend just the session(s) that pertain(s) to your current position or join us for all six sessions (within three years) and receive a certificate!

Remember, if you are a Finance Fundamentals graduate you are welcome to attend any session as a refresher.

**Finance Fundamentals I – Managing Cash**

**Finance Fundamentals II – Managing Compensation**

**Finance Fundamentals III – Mastering Reimbursements**

**Finance Fundamentals IV - Monitoring Funds**

**Finance Fundamentals V - Maximizing Funds**

**Finance Fundamentals VI - Mastering Procurement**

\* All Finance Fundamentals attendees must have a working knowledge of the Chart of Accounts.



# Ongoing Trainings

A reminder - the Administrative Operations ASAP Team continues to offer monthly trainings on FAS/University applications.

For more details, please visit: <https://adminops.fas.harvard.edu/asap-training>

## Upcoming sessions include:

Aurora	Concur Tips & Tricks
B2P Approver	GL-PCR
B2P Requestor	HART
B2P Advanced Topics	Journal Transfers & TLX
Chart of Accounts	PeopleSoft
Concur	Supplier Portal

First Friday Drop In (aka 'Stump the Trainer') – no registration required

Please register for all classes in the Harvard Training Portal:  
<https://trainingportal.harvard.edu/>



# BCD Update

- Effective February 18, 2023, BCD Travel will no longer be a preferred Travel Agency Partner of Harvard.
  - BCD will continue to support travelers who have already purchased tickets with travel dates beyond that time.
  - We encourage you to begin using one of our other preferred agency partners to support your future travel needs, including guest and/or meetings travel.
  - Travel booked through one of these preferred agencies provides access to the discounts and benefits negotiated with our Airline partners, and Harvard travelers are automatically registered with International SOS.
- For more information:
  - <https://admin-ews.eureka.harvard.edu/news/important-bcd-travel-update>



# ATH Closing

Next Administrators' Town Hall:  
January 19, 2023  
2 – 4:00 p.m.