

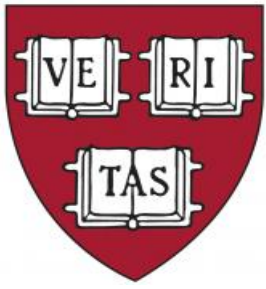
**Administrators' Town Hall will
be starting soon...**



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

February 15, 2024
Zoom



Agenda

Welcome

Scott Jordan

Finance

Scott Jordan, Susan Duda

HUIT

Kenton Doyle, Sarah Craig

GSAS

Geoff Tierney

Human Resources

Jess Bowne, Kathleen Green

Administrative Operations

Mary Ann Bradley, Maureen Berry, Kaitlyn Santa-Lucia (HUIT), Sean McQuarrie, Stephanie Nasson

Closing

Scott Jordan



Dean's Office Update

Scott Jordan

Dean of Administration and Finance



Finance Updates

Scott Jordan

Dean of Administration and Finance

Susan Duda

*Assistant Dean of Budget
and Financial Planning*



Harvard Web Publishing Transformation Program

Kenton Doyle

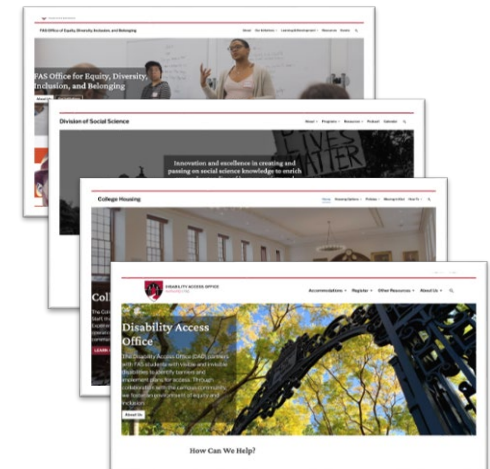
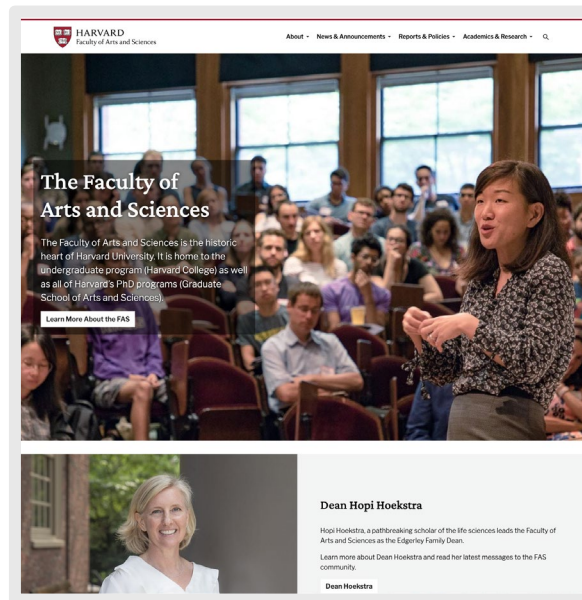
*Director, Harvard Web Publishing,
HUIT*

About Harvard Web Publishing

For over a decade, the Harvard Web Publishing (HWP) team in HUIT has enabled the Harvard community to build and manage thousands of websites. HWP provides site building platforms, project services, training, documentation, and support to the FAS, and across the institution.

Launched in Fall 2022

Designed in partnership with FAS Communications, the FAS flagship site provides the contemporary, accessible foundation for new sites.



About HWP's Service Transformation Program

OpenScholar, the software that powers thousands of sites, is reaching end-of-life. HWP is leading a two-year transformation program to move or retire all OpenScholar websites by November 2025

Program Objectives

- Launch HarvardSites, a secure, accessible, scalable, and cost effective – and migrate thousands of sites.
- Provide visibility, governance, and process controls to help schools and units better manage their web portfolios.
- Minimize disruption to site owners and visitors and decommission Harvard OpenScholar sites before the end of life in November 2025.

What will we deliver to the FAS?

- Ensure thousands of FAS sites are transitioned to HarvardSites
- Improve the user experience of site visitors through consistency of design and interaction.
- Provide an updated web publishing infrastructure and migration resources to work through the FAS Web Governance Group to plan, coordinate, and migrate sites

About HarvardSites

HWP is launching HarvardSites – modern, accessible, site building platforms based on WordPress and Drupal.

- Most OpenScholar websites will be moved to the new HarvardSites Drupal platform automatically, starting in March 2024. This new Drupal offering will provide improved capabilities, an accessible foundation and functional parity with OpenScholar.
- Beyond parity with OpenScholar, HarvardSites will provide an improved site editing experience, and is exploring many new features, such as Generative AI summaries and chat-like search experience.
- HarvardSites Wordpress (CampusPress) is available for immediate site building needs.
- Periodic updates and platform feature comparisons are provided on ostransition.hwp.harvard.edu

Program and School / Unit Web Governance

HWP works with local groups to establish the standards and prioritization for migrations

HWP Transformation Program

Program governance will ensure objectives are met and an optimal foundation is laid for multi-year road mapping and service delivery.

Steering Committee

- Strategic Direction and vision
- Budget management and approval of new initiatives
- Resolve major issues
- Foster Collaboration among schools, units and HUIT

Service Sub-committee

- Establish service model and service roadmap
- Define and oversee migration processes
- Predict and manage risks associated with web services
- Continuous improvement through metrics and user feedback

Technology Sub-committee

- Establish Technology platform roadmap
- Oversight of site readiness process
- Technology assessment, decisions and recommendations

Design Sub-committee

- Ensure a user-centric approach to design
- Support flexible design variations at the school/unit level
- Oversee accessibility compliance

School / Unit Governance

Drawing from a decade of un-governed, self-service site creation, HWP is helping to establish or re-invigorate local web governance.

FAS Web Governance

CADM Web Governance

School Web Governance

General purview of local web governance groups:

- Oversee experience across all properties, establish policies and standards.
- Manage domain registration and renewals aligned with branding.
- Maintain design standards across web properties.
- Develop portfolio management policies for site lifecycle management.
- Develop vendor guidelines to align with web governance policies.
- Ensure legal and ethical compliance of all web content.

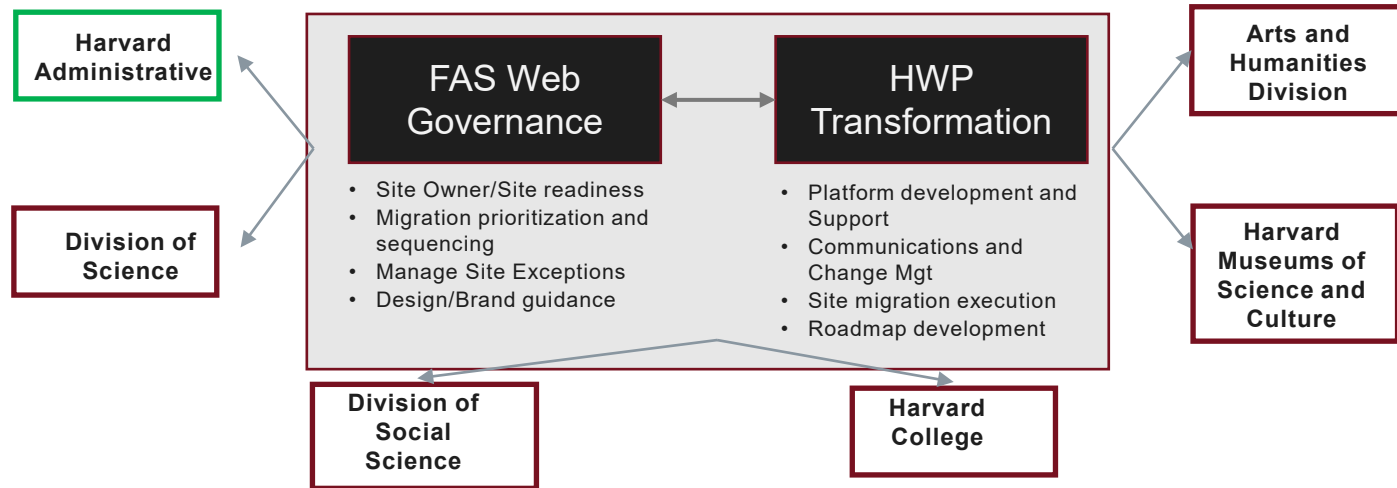
See: [FAS Web Governance](#)

FAS Web Governance Membership

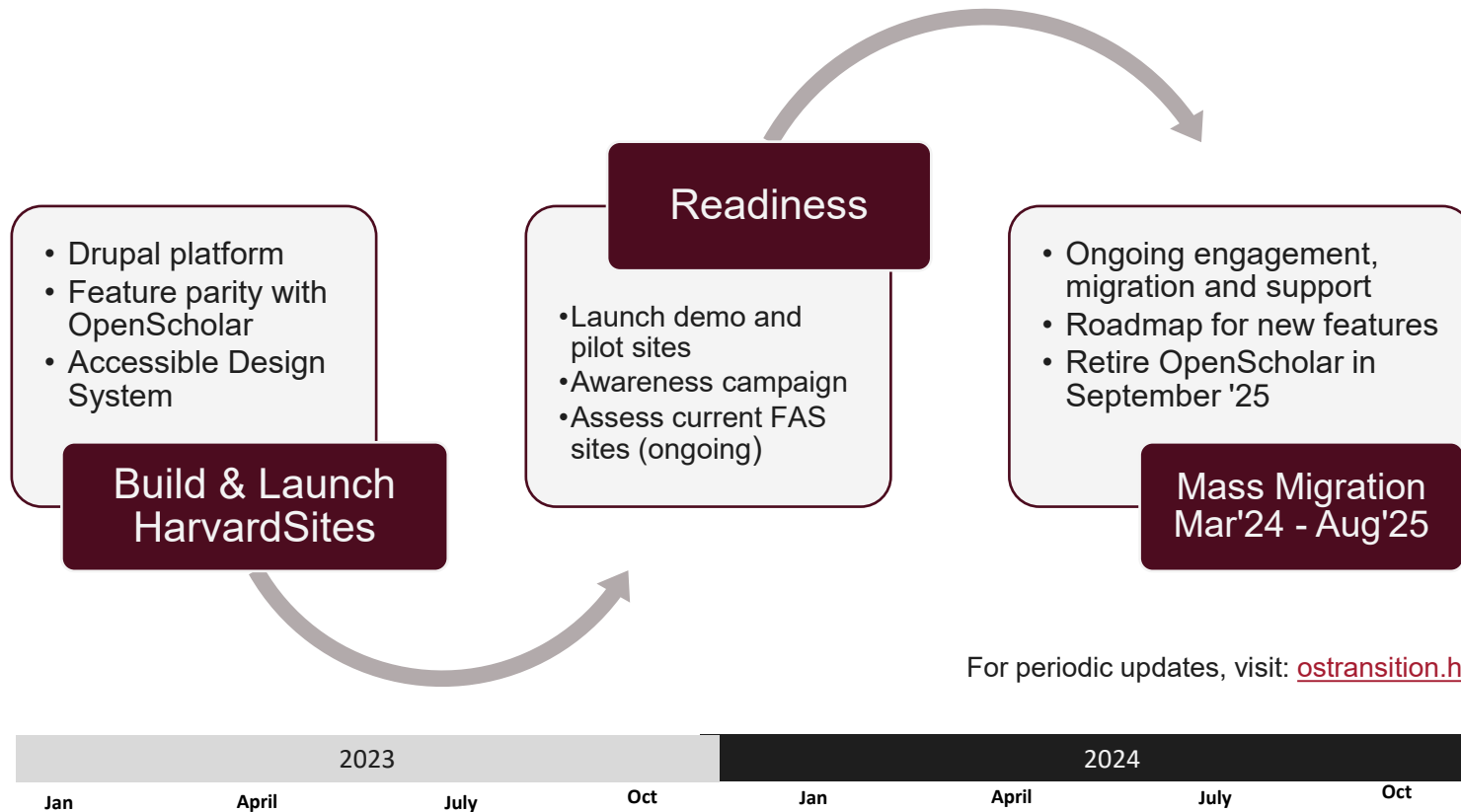
Name	Title	Org
Tiffany Ashtoncourt	Project and Change Manager	FAS Administrative Operations
Maureen Berry	Director of Project and Change Management	FAS Administrative Operations
Christine Boehler	Associate Director, Digital Strategy	FAS Communications
Gabriel Caro	Senior Project Manager	HUIT, Harvard Web Publishing
Sara Cody	Director of Employee Communications and Engagement	FAS Communications
Kenton Doyle	Director	HUIT, Harvard Web Publishing
Dorian Freeman	Assistant Director, User Experience	HUIT, Harvard Web Publishing
Bailey Snyder	Director of Communications	GSAS Communications
Kwok Yu	Senior Associate Dean of Faculty Affairs	FAS Faculty Affairs

HWP + FAS Engagement

HWP will partner through the FAS Web Governance group to establish standards and set the prioritization schedule for engagement. Administrative departments will lead the way in migration planning.



Transition Timeline





Thank you!





International Travel Loaner Program

Sarah Craig

*Senior Director, IT Operations,
HUIT*

Background

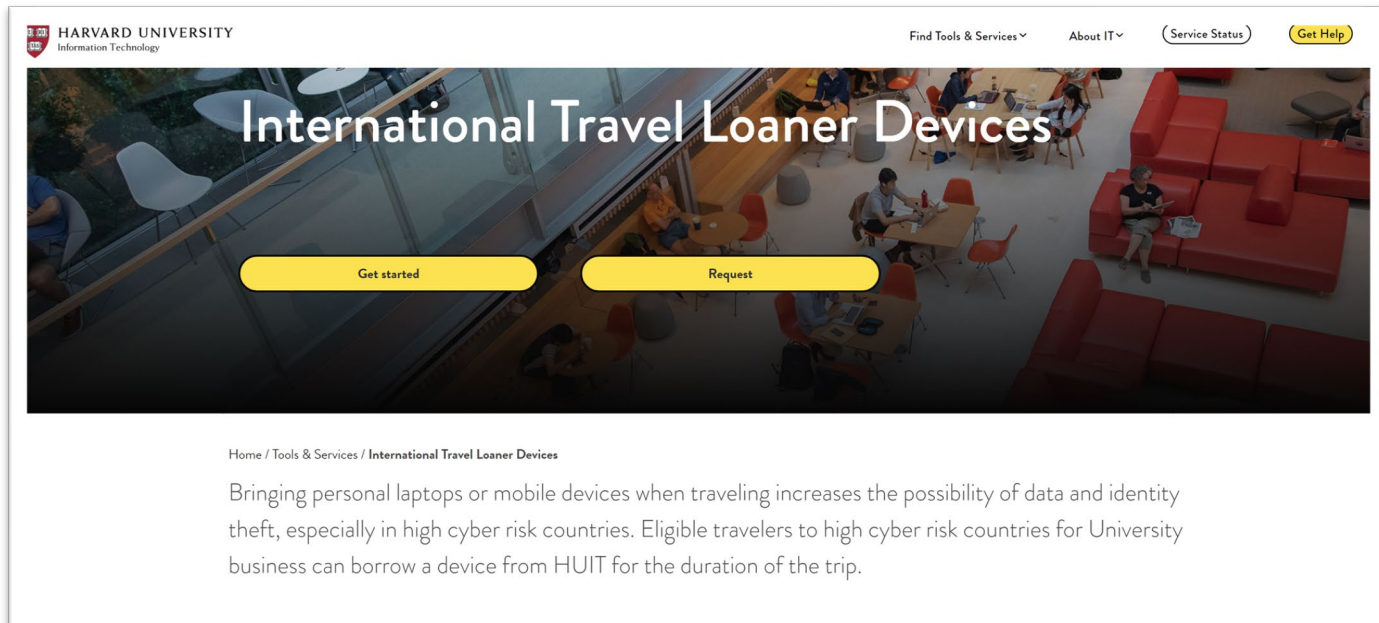
- In **2022 HUIT launched a pilot device loaner program** to support information security and data privacy during international travel.
- The pilot program was **available to the FAS Sciences** junior and senior faculty members.
- In 2023, HUIT leadership approved the **expansion and funding for a University-wide program** to support staff, faculty, and researchers traveling to high cyber risk countries on approved university business.
- The new service **launched in early February 2024.**

New Service Overview

Service Expectations	Details
Eligibility	All faculty, staff, and researchers in Central Administration, FAS, Harvard College, DCE, GSAS, SEAS, GSD, GSE, HBS, HDS, HKS, HLS, HMS (Quad), HSDM (Quad), Radcliffe, and SPH
Requirements	<ul style="list-style-type: none"> • Only for travel to China, Iran, North Korea, and Russia • Travelers must register their travel by visiting the Global Support Services website.
Cost	<ul style="list-style-type: none"> • No cost for the loaner device • Wireless plan for eSIM service is the responsibility of the borrower
Available Devices	<ul style="list-style-type: none"> • Laptops: <ul style="list-style-type: none"> • Dell Latitude 7340 • Apple MacBook Air M2 • iPhone 14 • Duo Hardware Token

Resources

- [Dedicated Website](#)
- [ServiceNow Request Form](#)
- [Global Support Services Guidance](#)



The screenshot shows the Harvard University Information Technology (HUIT) website page for "International Travel Loaner Devices". The page features a header with the HUIT logo and navigation links: "Find Tools & Services", "About IT", "Service Status", and "Get Help". The main content area has a large background image of a modern office space with people working at tables. Overlaid on this image is the title "International Travel Loaner Devices" in large white text, and two yellow buttons labeled "Get started" and "Request". Below the image, there is a breadcrumb trail: "Home / Tools & Services / International Travel Loaner Devices". The main text reads: "Bringing personal laptops or mobile devices when traveling increases the possibility of data and identity theft, especially in high cyber risk countries. Eligible travelers to high cyber risk countries for University business can borrow a device from HUIT for the duration of the trip."



Salaried Student Payroll

Geoff Tierney

Director of Finance, GSAS



Salaried Student Worker Payroll Conversion

1. What is the change?
2. Which appointments will be changed?
3. Why are we making this change?
4. What support can we expect?



Which appointments will be changed?

The MTF payroll will shift to a bi-weekly payroll on July 1st

Paygroup	MTF (Monthly Teaching Fellows)			
Union/Non Union	BOTH, Union and Non-Union			
Current Pay Frequency	Monthly			
Current Pay Date	15 th the month for the current month			
Job Codes	000902	019023	061700	069572
	GSU001	GSU002	GSU003	GSU004
	GSU005	GSU006	GSU007	
Object Code	6140			



Why are we making this change?

- Create consistency with industry standards
- Align student worker pay schedule with other staff employees
- Increase frequency of pay
- Reduce Off-Cycle payrolls
- Increased ability to address changes/problems



What support can we expect?

- University-wide coordination:
 - Office of Labor and Employee Relations, Central Payroll, HUIT, GSAS, supported by Central Admin Project Management
- Admin collaboration sessions:
 - Department appointment experts (both for TFs and RAs), department sponsored research admins, FAS payroll, AURORA, GSAS, OUE, Admin Ops
- Collaboration with the HGSU-UAW



Forthcoming Resources

- Communications:
 - To students
 - To administrators (including templates for administrators to use)
- AURORA enhancements
- Payroll calendar
- Common sample scenarios

The collaboration groups continue to offer ideas for resources to support this change.

- Questions and concerns can be e-mailed to mel_saunders@harvard.edu. They will then be collected in a concerns tracker.



Professional Development and Wellbeing Resources Performance Management Update

Jess Bowne

*Associate Director of Programs and
Communications, FAS Human Resources*



Professional Development and Wellbeing Resources

- CWD has published its [Winter/Spring 2024 schedule](#) of in-person, virtual, and hybrid classes alongside some self-paced options.
- The Office of Work/Life also has a [new schedule for Spring 2024](#) of wellbeing courses and overviews of the Employee Assistance Program.
- The [Administrative Fellowship Program \(AFP\)](#) application process for next year will launch with the Visiting Fellows proposal portal opening on February 26.
- KGA, Harvard's Employee Assistance Program, has relaunched their LifeServices platform to make it easier to access emotional and mental health support, financial and legal guidance, child and elder care assistance, and more.
https://my.kgalifeservices.com/?org_code=harvard



Performance Management at FAS

- A working group of staff from across the FAS has been meeting bimonthly since the fall to rethink the life cycle of the performance management process. Group is now also divided into subcommittees for Employee Development, Communications, Pay-for-Performance, Leadership, and the Performance Management system.
- The working group has a multi-year plan to develop best practices and tools and trainings for managers and individual contributors; explore enhancing the technology part of this process; and examine the existing ratings.
- The performance management process for FY24 will look similar to the FY23 process.



Review of Temporary Employment Policies

Kathleen Green

*Senior Labor and Employee Policy Analyst,
Office of Labor and Employee Relations*



Temps/LHT's - HUCTW Agreement

Policy for Harvard Direct Hire Temporary Employees

- Temporary Employees
- Less Than Half-Time Employees (LHTs)
- Occasional High Hour Contingent Workers (OHHCW)

Policy Exceptions

- Harvard Retirees, Harvard Students, High School Students, Interns
- Leaves of Absence

Policy Compliance

- HUCTW Joint Committee on Contingent Work (JCCW)



Temps/LHT's – Role of DA

Best Practices

- Preventing Policy Violations

Common Errors

- Communicating the Policy to Employees

DZConneX

- Agency Temps

Resources

- Helpful Policies and Documents



Temp/LHT Training for FAS Department Administrators

- Thursday, March 7th

11:00 am – 12:00 pm

[Register for March 7, 11:00am-12:00pm](#)

- Wednesday, March 20th

1:00 pm – 2:00 pm

[Register for March 20, 1:00 – 2:00pm](#)



Administrative Operations Initiatives

Mary Ann Bradley
*Associate Dean for
Administrative Operations*



Administrative Operations Initiatives

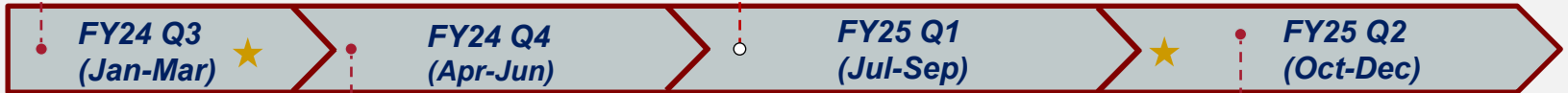
Project Landscape *Fiscal Year 2024 – 2025*

NOW

- **Electronic I-9 go lives:** Athletics, Academic Divisions, Museums
- Google storage cap limit announcement

LATER

- Electronic I-9 go lives: DCE centralization
- RCP outreach campaign
- HWP website transitions begin



NEXT

- Grad Student Payroll change goes into effect
- Electronic I-9 go lives: Academic Divisions
- FAS Conflict of Interest Policy launch
- HarvardSites pilot website migrations begin

FUTURE

- HWP website transitions continue
- International Payee Tax Compliance and B2P enhancements
- eShip Global in B2P

Recently completed

- OCT:** FAS Amazon Acct. finalized
- NOV:** HWP Active Website Audit
- DEC:** HCOL & GSAS I-9 go live
- JAN:** Sprintax go-live; U-wide CC policy launch; Harvard Phone network update & Webex Calling launch



A Day in the Life of an FAS Department Administrator

FAS Landscape and Day in the Life Studies - Activities to Date

2020-2021	2022	Fall 2022	March-April 2023	May-June 2023	July 2023	Aug-Dec 2023	February 2024	Ongoing
<p>FAS Landscape study sponsored by FAS Dean is performed</p> <p>Final report is documented and available.</p>	<p>FAS Admin initiated and budgeted for improvement activities related to the Landscape Study findings</p>	<p>FAS Leaders chartered “A Day in the Life” to deep-dive into the landscape study findings</p>	<p>In-Depth Day in the Life research study is performed</p> <p>Interviews, Focus Groups, Surveys</p>	<p>Day in the Life read-outs to FAS leaders, HUIT leaders, and DAs</p>	<p>Inventoried projects in flight & future work to address FAS DIL findings</p>	<p>Prioritized backlog established and ownership assigned</p> <p>Regular meetings to review progress</p>	<p>Read-out of progress with FAS Leaders and Teams</p>	<p>Admin Ops continues to drive prioritized items forward and track progress on associated university projects</p>

Day in the Life Study - Objectives, Methods, Participants

STUDY OBJECTIVES

Identify and document opportunities to improve the current ecosystem of an FAS DA in the following areas:



Systems and Integrations



Processes and Procedures



Documentation, Training, Policy

RESEARCH METHODS

A variety of research methods were used to learn about a day in the life of a Department Administrator:



Interviews



Direct Observations



Focus Groups



Surveys

PARTICIPANTS

95

Department Administrators

51

Departments

10

Avg. Years Experience



Strong On-Campus Presence



Constant Context Switching

Day in the Life Themes and Activities - What we learned and heard

*We require that department administrators maintain a vast knowledge of processes and systems to do their job.
A strong focus on Utility may outweigh other user needs like Usability, Findability, or Accessibility.
Functionality is often delivered in relation to one platform or process but has impact on a wider scale.*

HUMAN RESOURCES

Recruiting & Hiring

- Identify Needs for Role
- Curate Job Descriptions
- Gather Approvals for Role
- Create Job Posting
- Advertise & Search
- Screening and Interviews

Appointments

- Create Appointments
- Gather Final Approvals
- Background Checks
- Send Appointment Letters
- I9 Processing

Operations & Reporting

- Timesheet Entry & Approval
- Payroll

Onboarding & Training

FINANCE

Strategy & Planning

- Annual Budget Proposals
- Reconciliation of Actuals
- Journaling
- Budget Health Review

Procurement & Expenses

- Expense Report Creation/Review
- Expense Report Approvals
- Onboarding New Suppliers
- AP tracking and review

PROGRAMS & EVENTS

Travel & Event Coordination

- Flights and Accommodations
- Forms for Student Travel
- Catering Services
- Other Services

Space Management

- Space Reservations
- Building Service Requests

Communications / Marketing

- Mailing List Management
- Communication Campaigns
- Print/Poster Design
- (Customer) Relationship Management

ACADEMIC SUPPORT

Curriculum & Teaching

- Course and Curriculum Mgmt
- TAVTF Section Allocations
- TAVTF Appointments (HR)
- Student Degree Tracking
- Dissertation & Thesis Tracking

Department Faculty Support

- Data and Queries
- Admin & Technical help
- Researcher Appointments (HR)
- Graduate Placement Reporting

USER EXPERIENCE

Documentation







- User Guide Searching
- Policy Updates & KB Articles
- Google for Help

System Usability

- Recognition rather than Recall
- Flexibility and Efficiency
- Error Recovery

Themes in crimson color denote highest volume of feedback/pain points observed.







Prioritized Projects/Efforts and Outcomes – Recruiting and Hiring

Item	Outcomes/Impacts
 FAS Previous Term Registration Project *	Primary functionality released for enrollment in Spring term. Stabilization/enhancements ongoing. Reduces the time crunch for hire/onboard TA/TFs based on enrollment volumes.
 I9 eVerify and Equifax Updates	Roll out of electronic I-9s is ongoing in FAS this spring; estimated completion is Summer 2024
 CRF, PReP, Aurora, PeopleSoft Integration Project	Project underway to work on integrations and reduce data entry redundancies.
 Talent Acquisition Modernization of Harvard Careers **	FAS DIL research findings escalated to Modernizing Talent Acquisition Technology (MTAT) project team.
 Hiring and Onboarding processes and policies	Full process mapping of hiring process is in progress with Admin Ops. FAS Talent Acquisition launching Talent Acquisition Client Portal early March for hiring resources and support.
 Salary Breakdown Systematic Calculation	Feature is in the Aurora request list for prioritization after other CRF/PReP/Aurora integrations are in place.

** ITCRB Projects – University-wide review board for prioritizing and funding IT projects

* PRB Projects – FAS review board for prioritizing and funding IT projects





Prioritized Projects/Efforts and Outcomes – Finance

Item	Outcomes/Impacts
 Concur Approvals Review and Communications	Communications provided to clarify delegate and approver roles and policies. This alleviates some of the questions within smaller departments where delegates and approvers may be the same person.
 Sprintax Glacier Replacement	Live as of January 2024. Improves the process to onboard new vendors/suppliers, specifically alleviating some of the technology pain points for non-domestic constituents who must fill out appropriate forms.
 Financial Planning & Strategy *	PRB project underway to expand OAS functionality for FAS Finance and their stakeholders to a broader user base including Affiliate Tub Finance Office and Divisions. This will also address user access as well as additional data needs.
 Concur burst reports availability for self service	Finance and Admin Ops are working with HUIT on a Concur Expense Accrual report in HART for University use. Other reports (CoA approver, delegates, etc.) are being scoped for inclusion in FinReport.
 Next-generation PI Dashboard and eCert **	PI Dashboard and eCert project proposal submitted for FY25 ITCRB. Goal is to provide a streamlined process and system that facilitates detailed reporting and addresses significant risks and inefficiencies in the current state systems.
 Assess viability of "clearing house" central group to do Concur reports	Option is still in review. Concurrently, University Financial Administration is investigating ways to use technology and AI tools in Concur to improve reports and are soliciting feedback on the tool. Send specific scenarios or expense reporting pain points to adminops@fas.harvard.edu

** ITCRB Projects – University-wide review board for prioritizing and funding IT projects

* PRB Projects – FAS review board for prioritizing and funding IT projects



Prioritized Projects/Efforts and Outcomes – Department & Academic Support

Item	Outcomes/Impacts
 Section Allocation Tool Revision Project *	SAT is revised and rolled out. Post-go-live stabilization is complete
 FAS Previous Term Registration Project *	Primary functionality released for enrollment in Spring term. Stabilization/enhancements ongoing.
 FAS Data Hub *	Access for DAs will come in Spring 2024 and will include division-specific training Ongoing requests are being triaged and prioritized for future release cycles
 Visiting Committee Preparation	Initial discovery complete. Identified needs to be served after DA access granted in the FAS Data Hub. Departments who are interested in assistance gathering Visiting Committee data should reach out to Ismael Carreras, icarreras@fas.harvard.edu

** ITCRB Projects – University-wide review board for prioritizing and funding IT projects

* PRB Projects – FAS review board for prioritizing and funding IT projects






Prioritized Projects/Efforts and Outcomes – Communications & CRM

Item	Outcomes/Impacts
 CRM Project **	New CRM consulting service available from HUIT. ITCRB AA&D Next-Gen CRM project with Alumni Affairs is ongoing. Contact for CRM needs: HUIT_Salesforce@harvard.edu and cc: adminops@fas.harvard.edu
 Mailman Upgrade / Grouper for Distribution Lists	Admin Ops actively working with the Dean’s office on piloting Grouper (a technology tool for segmenting populations of users) for FAS-wide mass mailings

** ITCRB Projects – University-wide review board for prioritizing and funding IT projects

* PRB Projects – FAS review board for prioritizing and funding IT projects

Prioritized Projects/Efforts and Outcomes – User Experience

Item	Outcomes/Impacts
 Documentation for IT Help	HUIT IT Landing page updates and improved functionality for search Landing Page: https://it.fas.harvard.edu/
 File and Document Sharing/Management	SharePoint & Google policies, training and communications ongoing
 Assess current channels for documentation and ease of use	Pending review with Admin Ops training team on overall strategy
 Assess Admin Ops owned training vs helpdesk offerings	Pending review with Admin Ops training team on overall strategy
 Digital Accessibility Support	With the Harvard Sites migration project, all website templates will be accessible

What's Next? More FAS Community Engagement



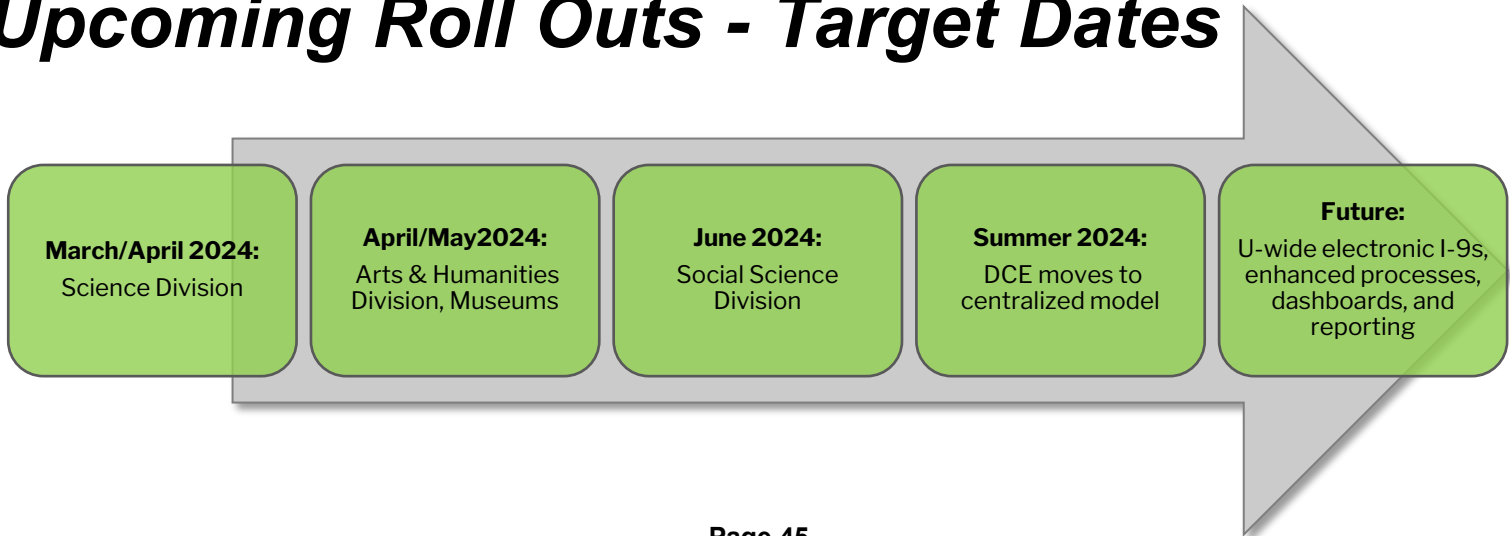


Electronic I-9 Roll Outs for FAS

Completed Roll Outs



Upcoming Roll Outs - Target Dates





FAS Amazon Program

- Eliminates individual Amazon Prime membership fees, enterprise account is paid centrally by FAS
 - Existing memberships will receive a prorated refund
- Amazon Prime membership benefits like free two-day shipping, Prime Day deals, Prime Early Access, and other shipping discounts
- Provides business volume pricing, bulk pricing and a catalog of available items aligned with University purchasing guidance
- Access to millions of additional products, available only to Business customers
- Centralized tax exemption for states where Harvard is tax exempt (determined by ship-to state)
- Supports Harvard's initiatives for use of local, diverse and sustainable vendors



FAS Amazon Program

- FAS is paying for the centralized program, so we need to continue to merge accounts over
- Currently have 864 members in the program
 - 1264 user have taken no action
 - Not all accounts are for Harvard business
 - Harvard email used to setup account
- Need help identifying departments that have an Amazon account linked to a departmental email
- Group functionality – allows members within the group to see each others' orders, share payment methods as well as the ability to assign Administrator & Approver roles for the group
- Dedicated Amazon Reps
 - Stacey Dziurzynski - sedzi@amazon.com
 - Kelsey Bowen - kelsbow@amazon.com



FAS Credit Card Escalation Protocol

- This protocol is a tub-based addendum to the University Credit Card policy and will be in affect for all FAS tubs. Its purpose is to detail the escalation procedures for past due balances, missing documentation, late fees, and repeat/significant violations of the University policy.
- Awaiting final review from the Tax Office and Reimbursement & Card Services, this protocol has been vetted by Faculty Affairs, Divisional Deans, as well as several senior administrators from across all FAS divisions.
- Once finalized, it will be shared with all current FAS cardholders and approvers and posted on the University Policy/Administrative Operations websites for future reference.



'Steady State' Trainings

A reminder - the Administrative Operations ASAP Team offers 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 |

Every Friday Drop In (aka 'Stump the Trainer') – no registration required
<https://harvard.zoom.us/j/98978574543?pwd=bS9mVIVxMmp3NkdSZIFSZDI6L2t1UT09>

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



More in February/March 2024!

Remaining “Fin Fun” sessions:

Finance Fundamentals III – Mastering Reimbursements

Finance Fundamentals IV - Monitoring Funds

Finance Fundamentals V - Maximizing Funds

Finance Fundamentals VI - Mastering Procurement

From the Office of the Strategic Director of Endowment and Gifts:

FAS Endowment & Gift Management

Friday, March 1 from 9- 10:30 AM

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/common/leclassview/virtc00000000023238



33 days until spring!

