

# **FAS Administrators' Town Hall**

**March 23, 2023**

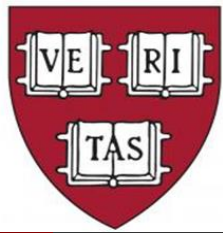
**Zoom**



# Welcome

**Scott Jordan**

*Dean of Administration and Finance*



# Agenda

**Welcome**

Scott Jordan

**Financial Updates**

Scott Jordan, Jay Herlihy

**Alumni Affairs & Development**

Beth Thompson

**HUIT**

Joe Gallagher

**Human Resources**

Tiffany Jadotte, Karen Pearce

**Administrative Operations**

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

**Closing**

Scott Jordan



# Financial Updates

**Scott Jordan**

*Dean of Administration and  
Finance*

**Jay Herlihy**

*Associate Dean for  
Finance*




# FAS Development Overview

**Beth Thompson**

*Assistant Dean of Development*

## AGENDA

- 
- I. Our Team, Goals and Priorities
  - II. FY23 Fundraising Update
  - III. FY23 Focus Areas
  - IV. Challenges and Opportunities

The background of the slide is a photograph of the Harvard University building facade, featuring a series of white columns and a wide set of stone steps leading up to the entrance. The building is made of red brick and has large windows with yellow light inside. The text "UNIVERSITY MEMORIAL LIBRARY" is visible on the upper part of the facade. A red banner with white text is overlaid on the top part of the image.

# OUR STRATEGIC IMPERATIVE

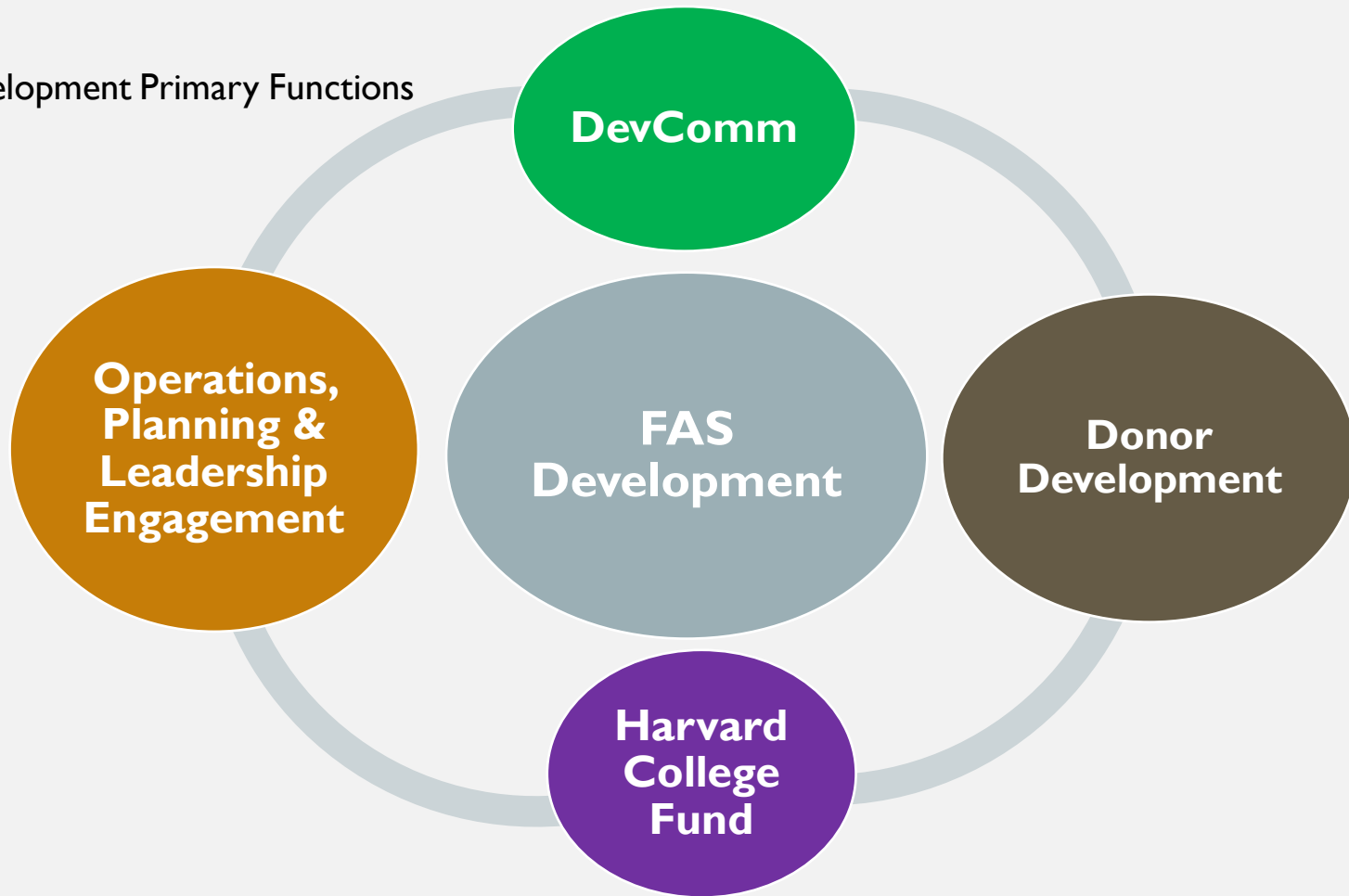
The Faculty of Arts and Sciences is a community of unbounded intellectual ambition.

As a development team, we are committed to advancing Dean Claudine Gay's vision and priorities across the FAS by engaging our global community and generating philanthropic resources.



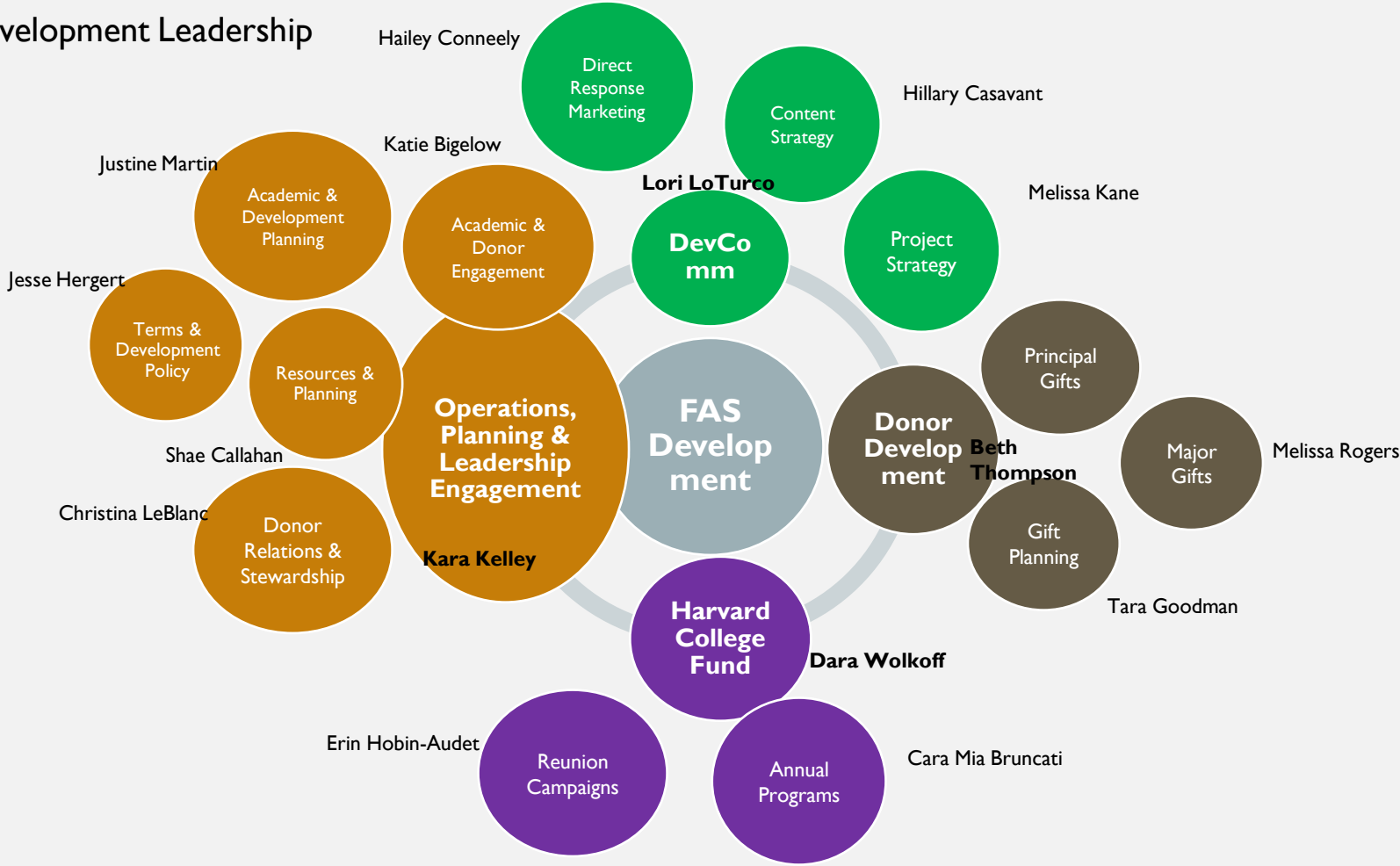
**HARVARD**  
Faculty of Arts and Sciences

FAS Development Primary Functions






# FAS Development Leadership



# FY23 FAS DEVELOPMENT GOALS

- 
1. Strengthen fundraising momentum consistent with our multi-year development agenda by focusing on core priorities and initiatives and securing at minimum \$400M comprised of current, endowed and deferred commitments.
  2. Support FAS's fiscal health by raising flexible resources, through \$50M in current-use funds, \$100M for financial aid, and increasing overall alumni participation.
  3. Generate \$450M in HCF-creditable, multi-year reunion-driven commitments.
  4. Strengthen our forged bond with FAS volunteers by enlisting and stewarding 1,200 soliciting volunteers and build a comprehensive and diverse volunteer roster for leadership development and succession planning.
  5. Advance key objectives outlined in our DEIB task force report and contribute to FAS and AA&D outcomes that advances our principles and values.
  6. Develop and implement strategies to foster a more engaged and inspired team through internal communications, management training, and mechanisms to celebrate individual and team contributions.
  7. Deliver a comprehensive and diverse learning and development agenda that deepens curiosity and fluency on FAS priorities, and strengthens fundraising, communications, planning and volunteer engagement competencies.
  8. Craft a development communication plan that amplifies Dean Gay's vision, voice and leadership among alumni and parents to support the expansion of our donor pipeline.
  9. Strengthen our team through successful recruitment and on-boarding of new colleagues and create professional development and career pathways for current team members as we continue to build a peerless development enterprise.
  10. Deepen the partnership with the HAA by contributing to the on-boarding of the new Associate Vice President and Executive Director, as well as continuing to strengthen the strategic alignment between the Harvard College Fund and College Alumni Programs.

# FAS ACADEMIC AND ADMINISTRATIVE PARTNERS



**Armin Afsahi**

Associate Vice President and Dean of Development, Faculty of Arts and Sciences



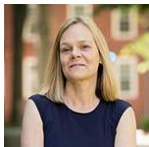
**Lawrence Bobo**

Dean of Social Science  
W.E.B. Du Bois Professor of the Social Sciences



**Nancy Coleman**

Dean of the Division of Continuing Education



**Emma Dench**

Dean of the Harvard University Graduate Schools of Arts and Sciences



**Francis J. Doyle III**

John A. Paulson Dean of the Harvard John A. Paulson School of Engineering and Applied Sciences  
John A. and Elizabeth S. Armstrong Professor of Engineering and Applied Sciences



**William R. Fitzsimmons**

Dean of Admissions and Financial Aid



**Claudine Gay**

Edgerley Family Dean of the Faculty of Arts and Sciences  
Wilbur A. Cowett Professor of Government and of African and African-American Studies



**Scott Jordan**

Dean for Administration and Finance



**Robin Kelsey**

Dean of Arts and Humanities  
Shirley Carter Burden Professor of Photography



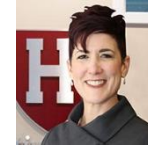
**Rakesh Khurana**

Danoff Dean of Harvard College  
Professor of Sociology and Organizational Behavior



**Susan Lively**

Secretary of the Faculty



**Erin McDermott**

John D. Nichols '53 Family Director of Athletics



**Sheree Ohen**

Associate Dean of Diversity, Inclusion, and Belonging, Faculty of Arts and Sciences



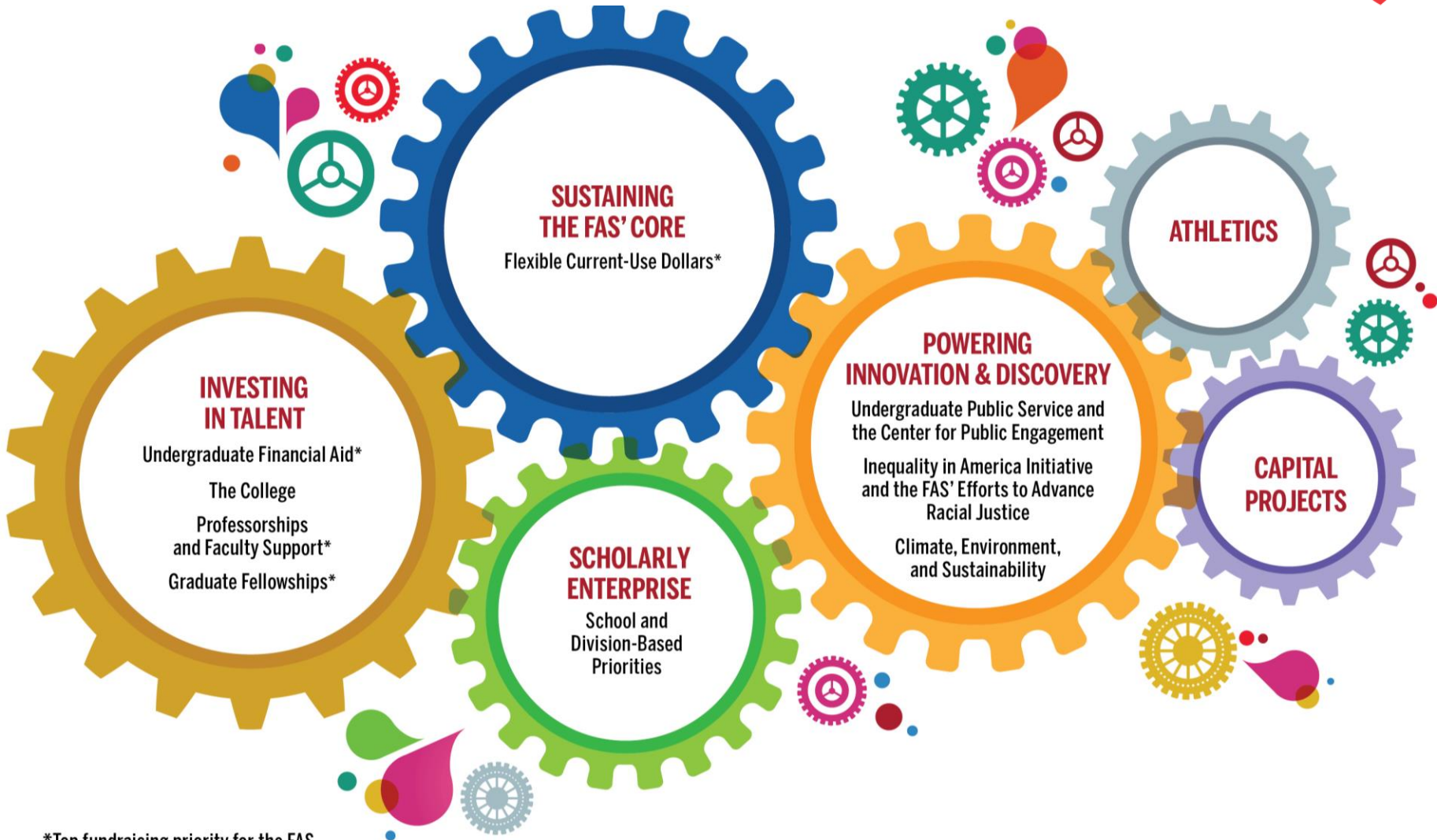
**Christopher Stubbs**

Dean of Science  
Samuel C. Moncher Professor of Physics and of Astronomy



**Nina Zipser**

Dean for Faculty Affairs and Planning



**SUSTAINING  
THE FAS' CORE**  
Flexible Current-Use Dollars\*

**ATHLETICS**

**POWERING  
INNOVATION & DISCOVERY**

Undergraduate Public Service and  
the Center for Public Engagement

Inequality in America Initiative  
and the FAS' Efforts to Advance  
Racial Justice

Climate, Environment,  
and Sustainability

**CAPITAL  
PROJECTS**

**INVESTING  
IN TALENT**

Undergraduate Financial Aid\*

The College

Professorships  
and Faculty Support\*

Graduate Fellowships\*

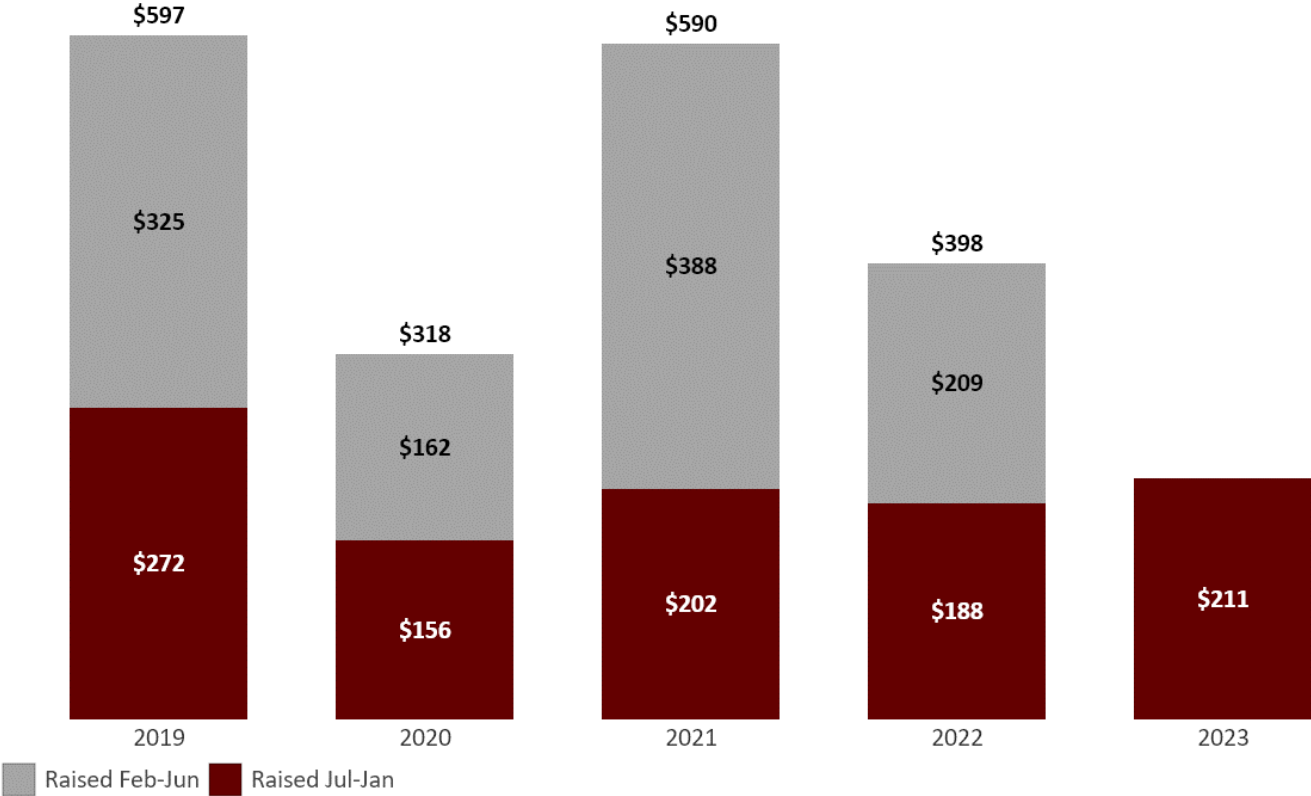
**SCHOLARLY  
ENTERPRISE**

School and  
Division-Based  
Priorities

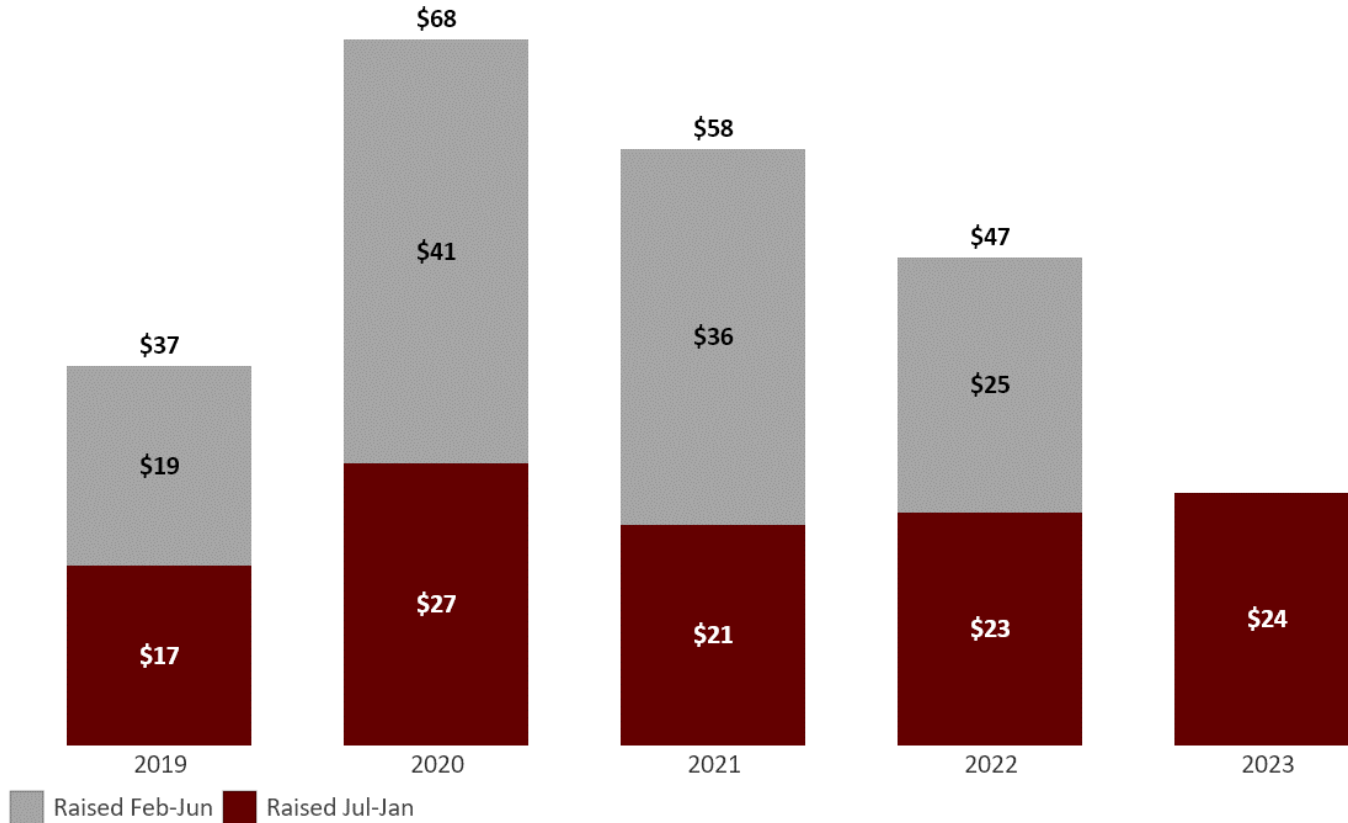
\*Top fundraising priority for the FAS



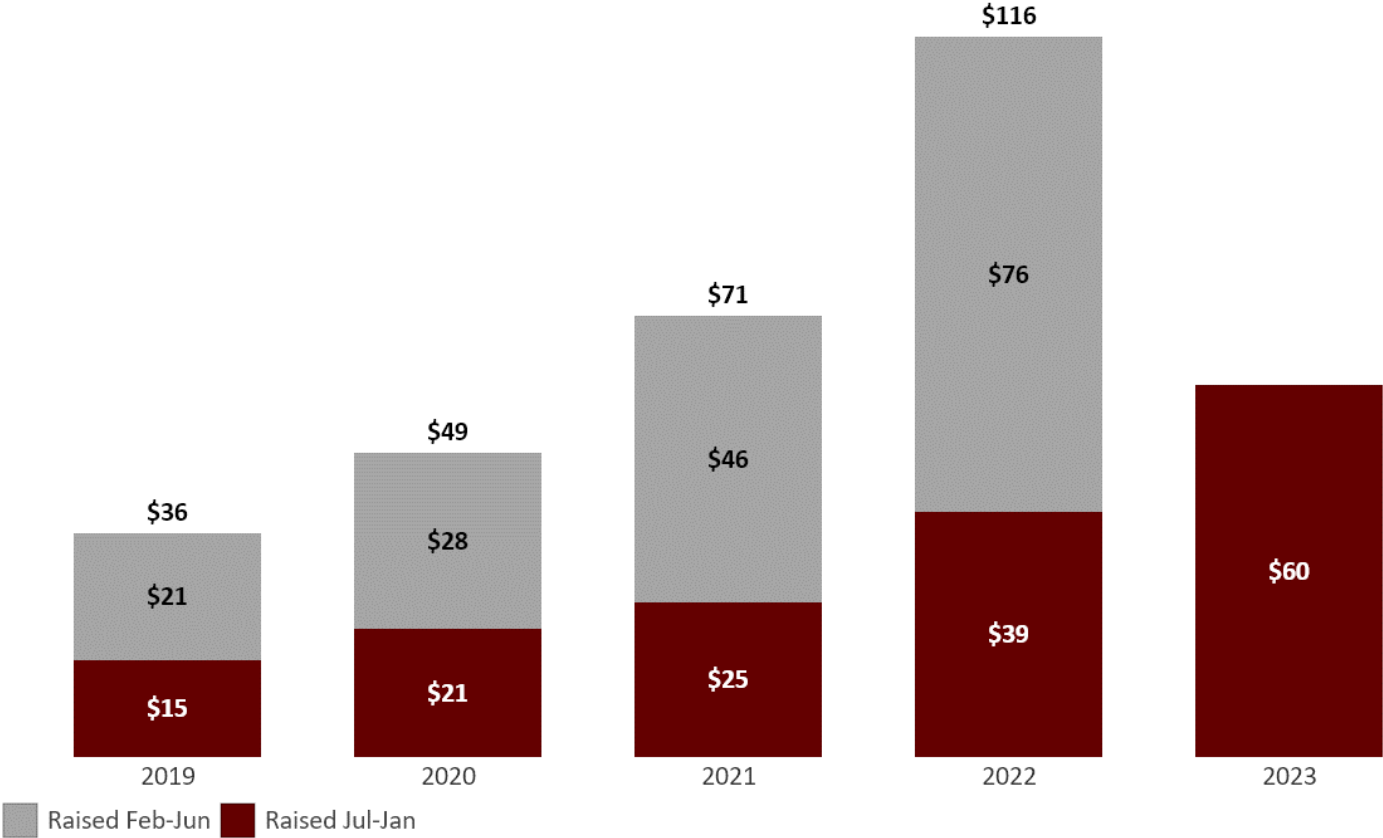
# FAS DEVELOPMENT FY23 FUNDRAISING: COMMITMENTS AS OF JANUARY 31



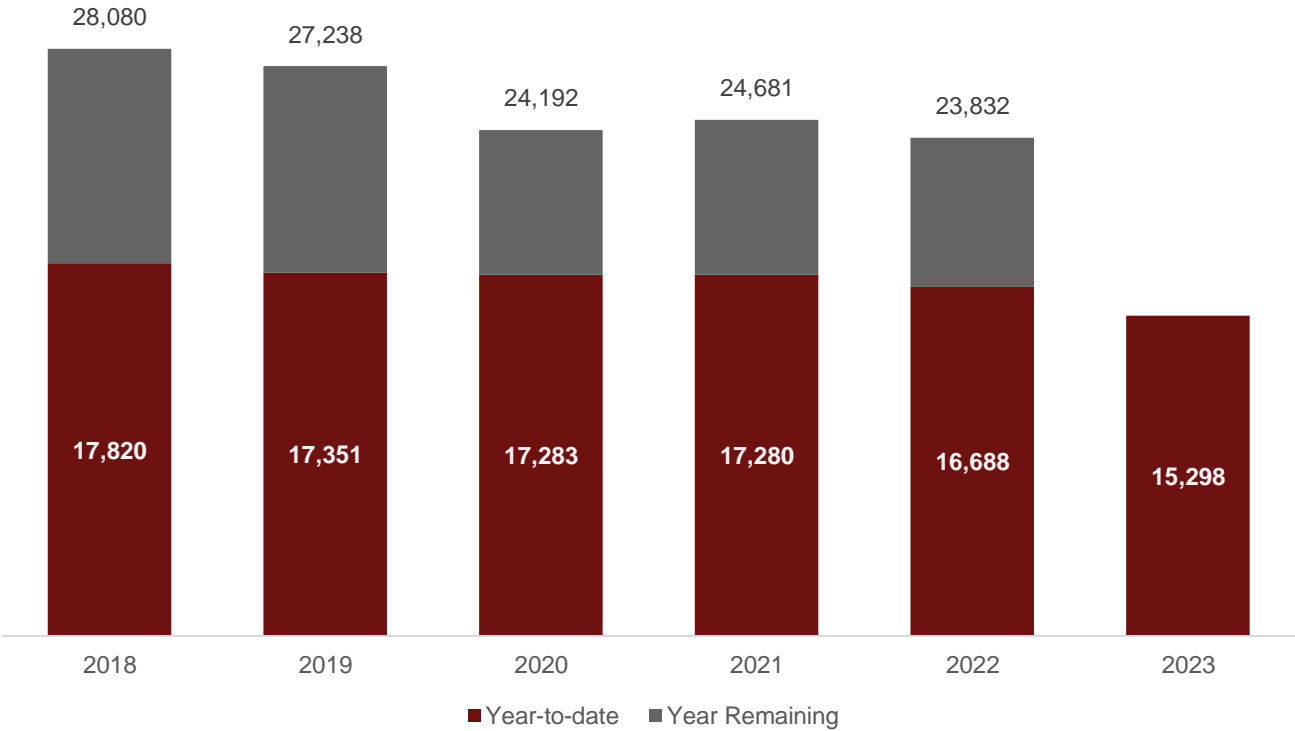
# FAS DEVELOPMENT FY23 FUNDRAISING: FLEXIBLE, CURRENT-USE AS OF JANUARY 31



# FAS DEVELOPMENT FY23 FUNDRAISING: FINANCIAL AID AS OF JANUARY 31





# FAS DEVELOPMENT FY23 FUNDRAISING: HARVARD COLLEGE PARTICIPATION AS OF JANUARY 31





## FY23 FOCUS AREAS

- 
- Unifying and amplifying FAS Vision, Values and Priorities
  - College Alumni Attitudes and Perceptions
  - Diversity, Equity, Inclusion and Belonging
  - Affinity Engagement: Women's Philanthropy Initiative
- 

## CHALLENGES AND OPPORTUNITIES

- Donor Stewardship
- College Alumni Participation
- Europe and West Coast Expansion
- Team and Culture

# THANK YOU



**HARVARD**  
Alumni Affairs & Development

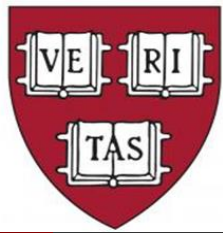




# Transition from LastPass to 1Password

**Joe Gallagher**

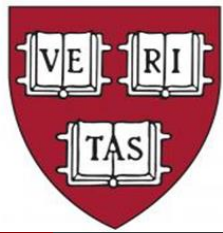
*Director, Information Security  
Education and Consulting, HUIT*



# Password Manager Service

## Background

- Drivers
  - LastPass Incident – "Reset Critical Passwords"
  - Improved Security – User managed Secret Key strengthens encryption
- Goals
  - Replace LastPass with 1Password – New vendor (AgileBits Inc.) and product
  - Self-paced transition ~10-15 mins
- Challenges
  - Product familiarity / Secret Key management
  - Multiple university uses / Distributed support model
- September 29<sup>th</sup>
  - LP contract ends
  - Low Impact: LP accounts will continue to be accessible

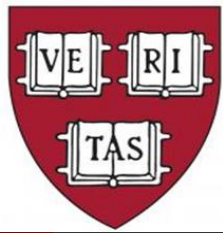


# Password Manager Service

## 2023 - 1Password Transition Timeline

Month	Service Pilot	Staff/Faculty/Researchers/Paid Positions	LP Enterprise*	Students Grad/UnderGrad
Feb-Mar	✓			
April-May		✓		
May-Aug		✓	✓	
Sept+				✓

\*Used to share passwords internally. Most commonly IT support.



# Password Manager Service

## Next Steps

- Existing LP user communications *April 10<sup>th</sup>*
- LP Enterprise migrations *After graduation*
  - School ADMINS
  - Vault Owners
- Existing Student rollout *After graduation – Sept push*
- Plans for FY24
  - Expand the use of Password Managers
  - HarvardKey integration for Business Accounts (LP Enterprise)
  - Productivity training
  - Password Manager services/product consolidation

**HUIT Service Page: <https://huit.harvard.edu/password-manager>**



# Dynamic Work Survey Results

**Tiffany Jadotte**

*Associate Dean for FAS Human  
Resources*

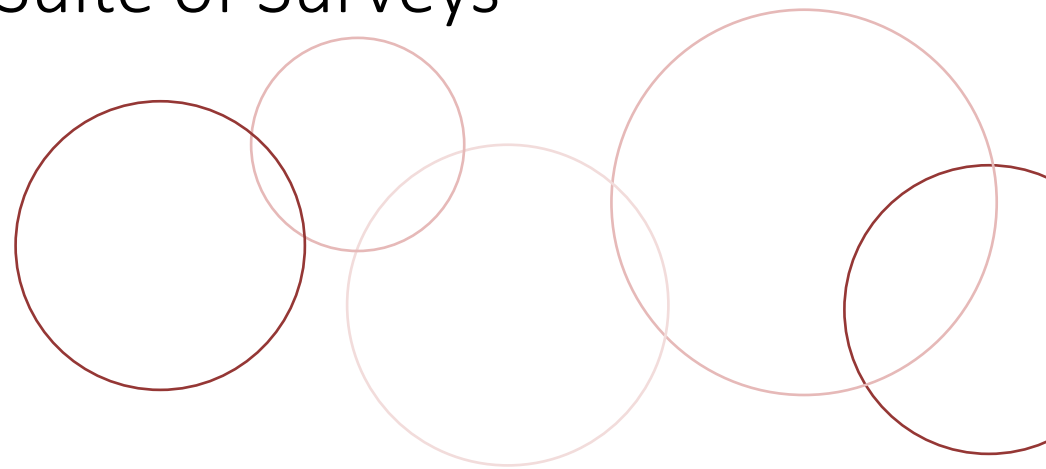
**Karen Pearce**

*Senior Director of Institutional  
Research*



# Dynamic Work Strategies

## Results from Fall 2022 Suite of Surveys



Prepared by:

Karen Pearce, PhD, Senior Director, FAS-IR

Jenny Bergeron, PhD, Director of Educational Research and Evaluation, FAS-IR

# Suite of Surveys

Target	Date Administered	Response Rate
Staff Survey	November 28 - December 13	68.7%
Undergraduate Survey – First Years	November 28 - December 14	49.5%
Faculty Survey	December 12 - January 6	31.5%
GSAS Survey	November 15 – December 20	12.2%

*\* All surveys developed in-house by FAS-IR in collaboration with Dynamic Work Strategies Working Group*

# Staff Survey

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## % of Respondents from Each Unit (Self-Reported)

	Total	%
Science Division	303	16.9%
Harvard College	253	14.1%
DCE	249	13.9%
Social Science Division	218	12.2%
Administration and Finance	187	10.5%
Arts and Humanities	134	7.5%
Museums	107	6.0%
GSAS	81	4.5%

	Total	%
Did not identify Unit	63	3.5%
Athletics	54	3.0%
Write in Text – College/GSAS	44	2.5%
Admissions and Financial Aid	38	2.1%
FAS Dean's Office	33	1.8%
Office for Faculty Affairs	16	0.9%
Library	9	0.5%
Total	1789	100%

# Characteristics of Respondents

<b>GENDER</b>	<u>N</u>	<u>%</u>
Male	413	25%
Female	981	58%
Other/self-describe/DNA	285	17%
Total	1679	100%

<b>AGE</b>	<u>N</u>	<u>%</u>
Up to 29 years	150	9%
30-34	204	12%
35-39	205	12%
40-55	629	37%
56 and older	251	15%
Prefer not to disclose	240	14%
Total	1679	100%

<b>CHILDREN</b>	<u>N</u>	<u>%</u>
Pets	843	54%
Children under 18	553	35%
Elder Care	300	19%

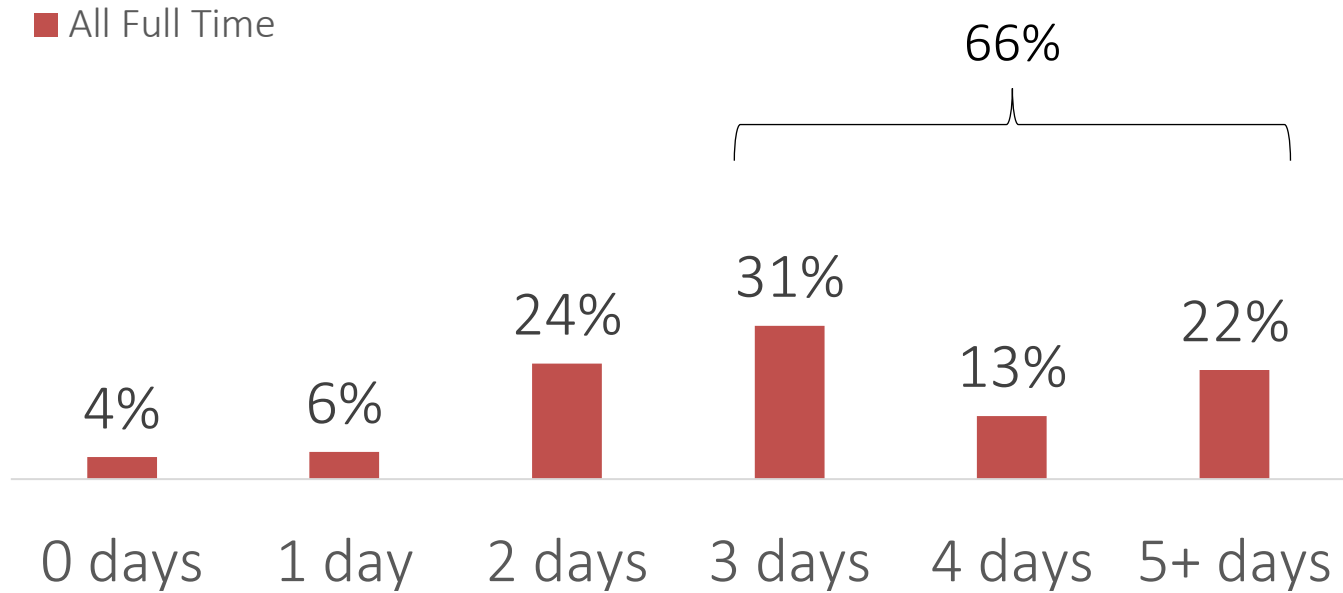
<b>FT/PT</b>	<u>N</u>	<u>%</u>
Full Time	1679	94%
Part Time	103	6%
Total	1782	100%

<b>Grade Level</b>	<u>N</u>	<u>%</u>
47-56	743	42%
57-59	565	32%
60-64	98	6%
I don't know	94	5%
DNA/Prefer not to say	289	16%
Total	1789	100%

# Staff Work Schedules

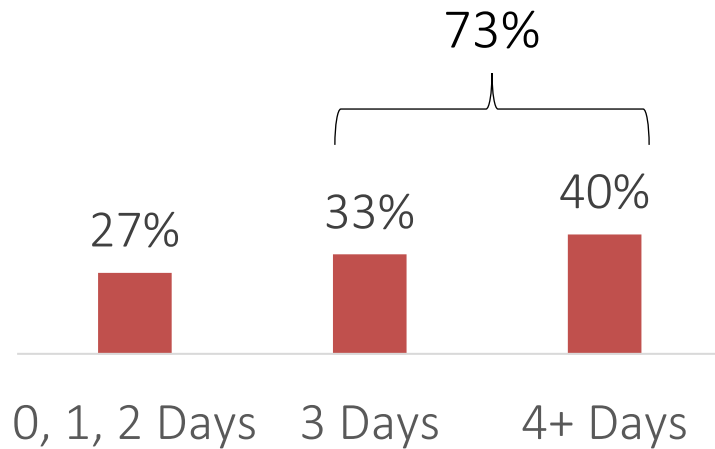
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# 66% of FT staff work on-campus 3+ days per week

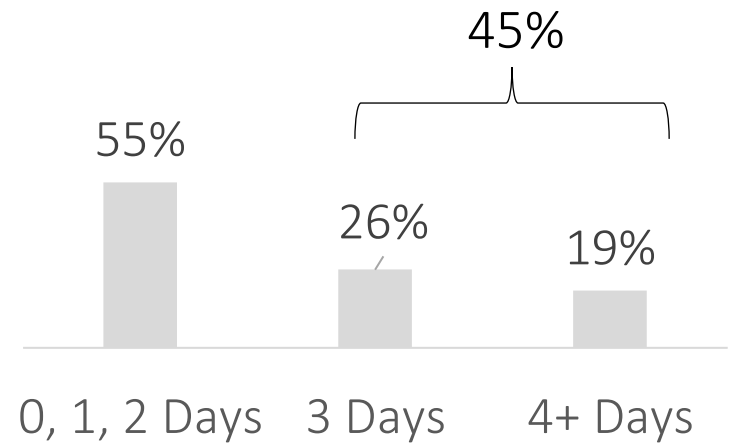


# Staff working with student/faculty are on campus more frequently than those who are staff-facing

Student- and/or Faculty- Facing Roles

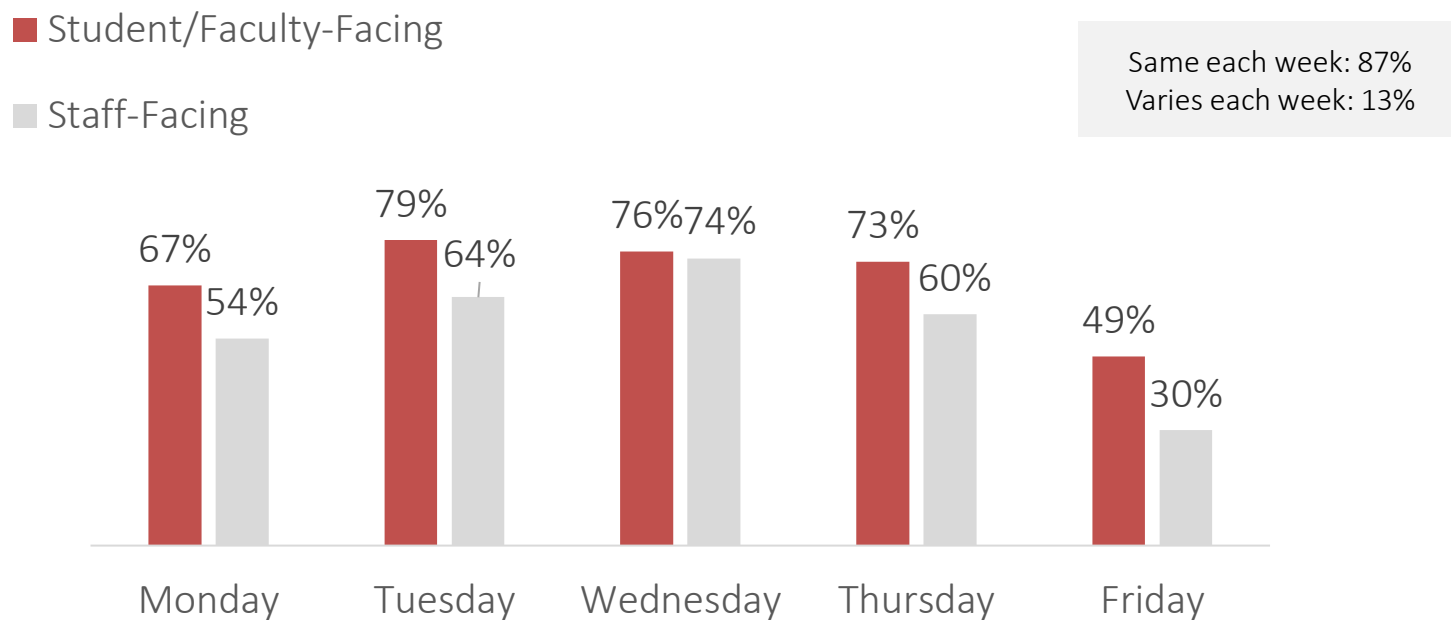


Staff-Facing Roles





## “Coverage” is highest midweek



# Schedules by Units

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Across units, most in student/faculty-facing roles average b/t 3 and 4 on-campus days per week; more unit variability for staff-facing roles

Student/Faculty-Facing Roles		
	N	Average
All Stu/Fac-Facing	1204	3.4
Athletics	45	5.7
DCE	150	2.1
FAS Dean's Office	21	3.7
Museums	55	3.7
Science	242	3.6
A & H	100	3.6
A & F	92	3.5
Harvard College	191	3.6
GSAS	64	3.5
Social Science	167	3.1
Adm/Fin Aid	25	3.0
No unit identified	64	3.5

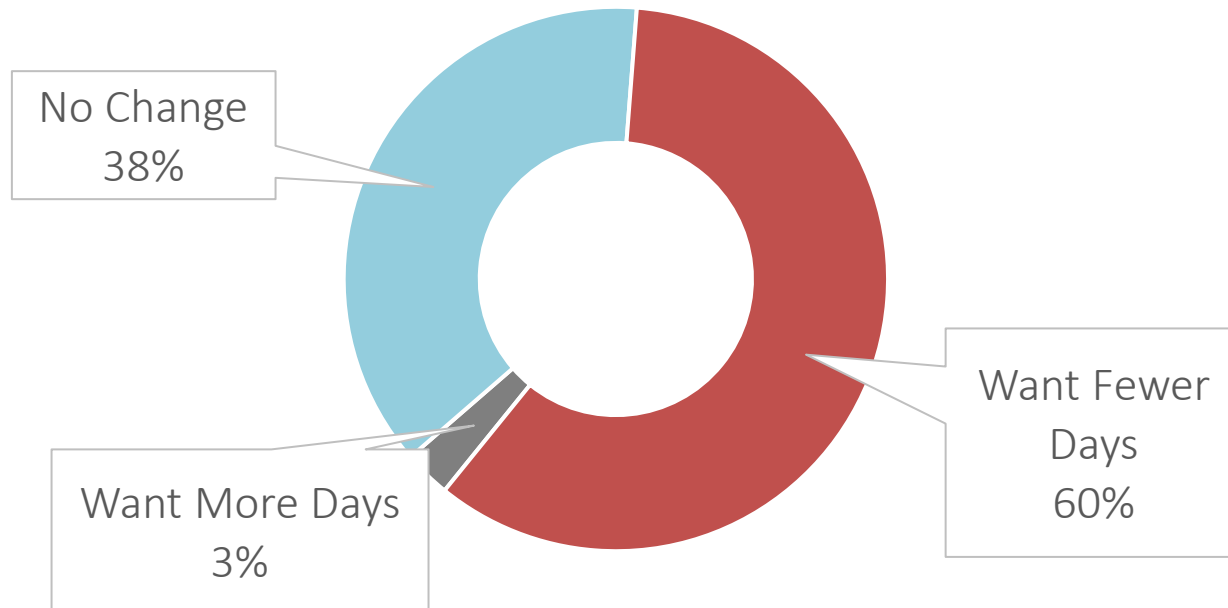
Staff-Facing Roles		
	N	Average
All Staff-Facing	340	2.7
Athletics	7	5.1
DCE	72	2.0
FAS Dean's Office	8	2.9
Museums	40	3.3
Science	28	3.0
A & H	16	3.7
A & F	74	2.6
Harvard College	43	2.8
GSAS	13	3.0
Social Science	16	2.4
Adm/FinAid	8	2.1
No unit identified	15	2.9

# Staff Preferences

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## 60% of staff want to work fewer days on campus

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## 65% of staff preferring fewer on-campus days would prefer to work 1-less day than current schedule

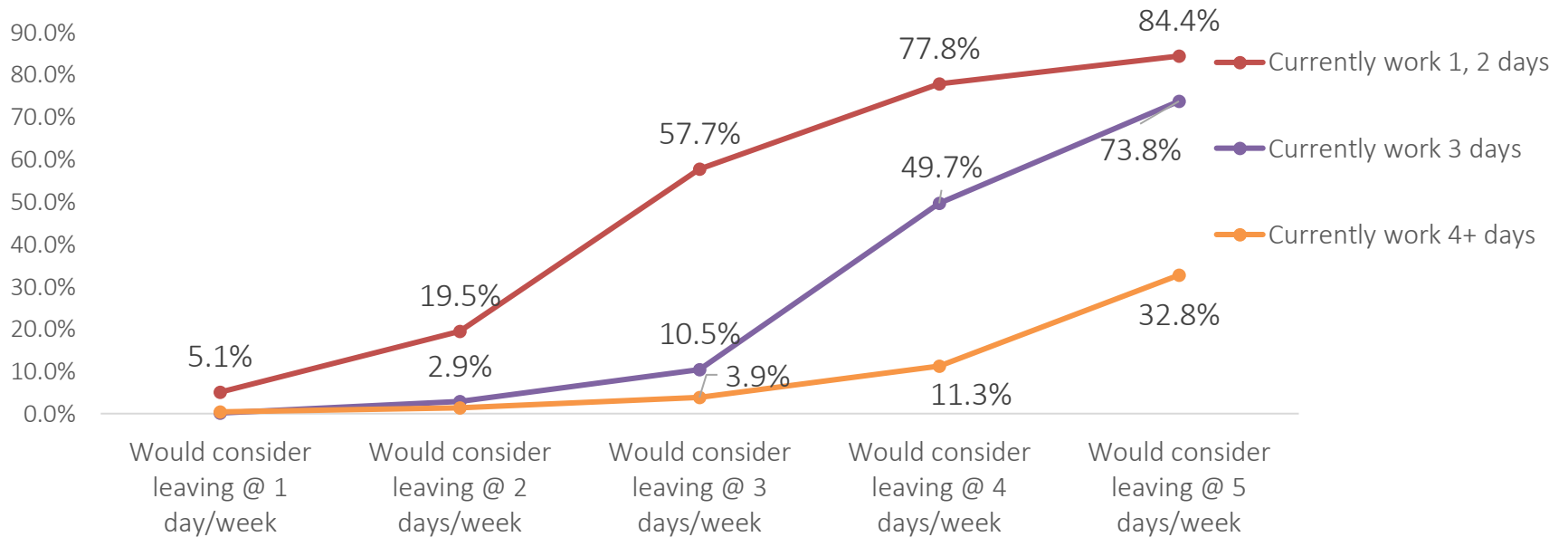
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Preference	N=985*	Average Preference
1 Less Day than current schedule	65%	1.4 days less than current schedule
2 Less Days than current schedule	28%	
3 less days than current schedule	7%	

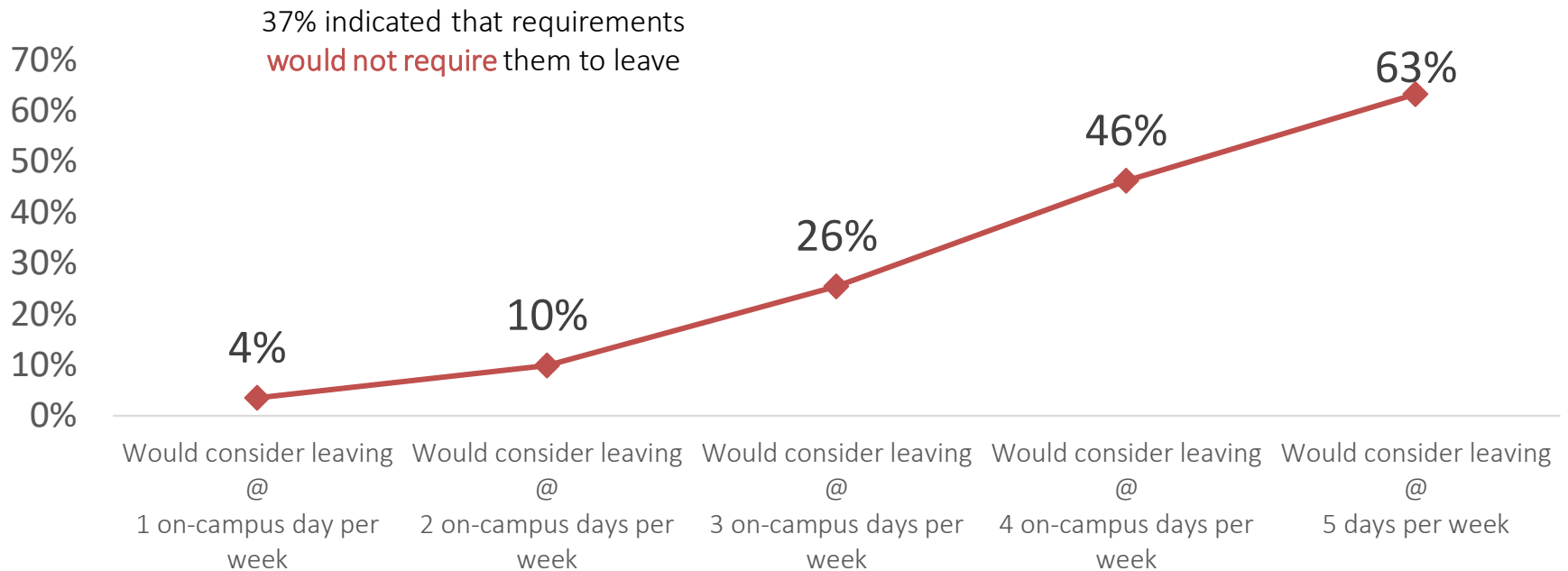
*\*Among staff who prefer to work fewer days*

# High retention risk occurs if staff are required to spend 1 additional day on campus over current schedule

At what point would staff consider leaving FAS?



# 46% of staff would consider leaving FAS with a one-size-fits-all 4-day on-campus requirement



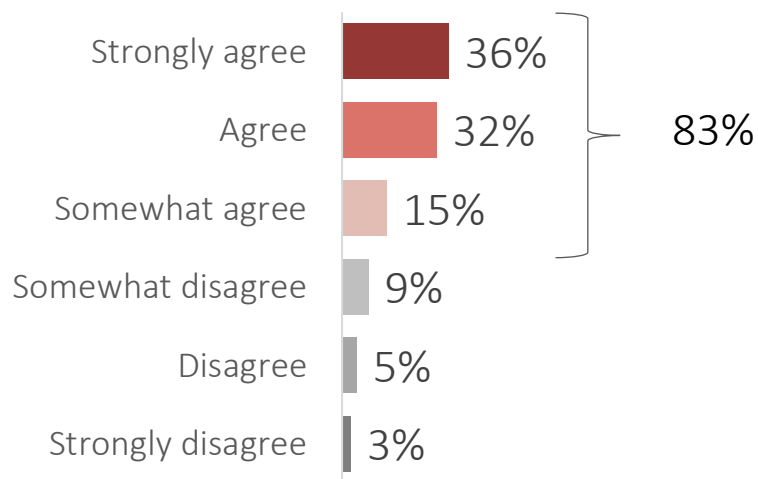


# Faculty

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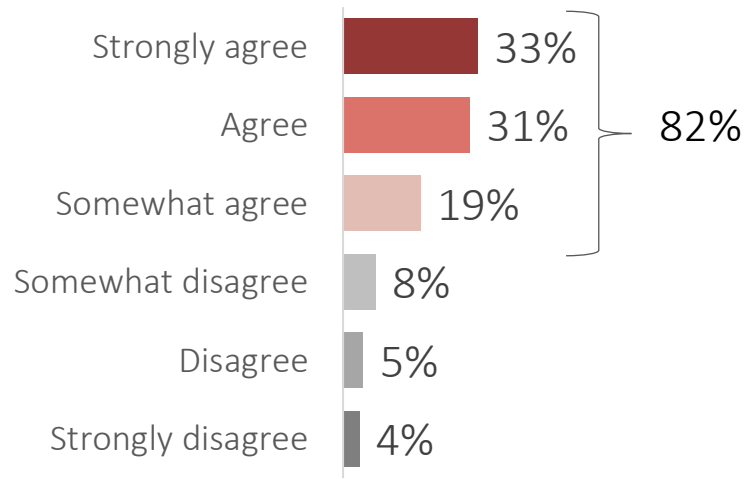
# Faculty generally agree dept staff are reachable & available

I have been able **to get in touch with staff in my department** when I need to



N=344

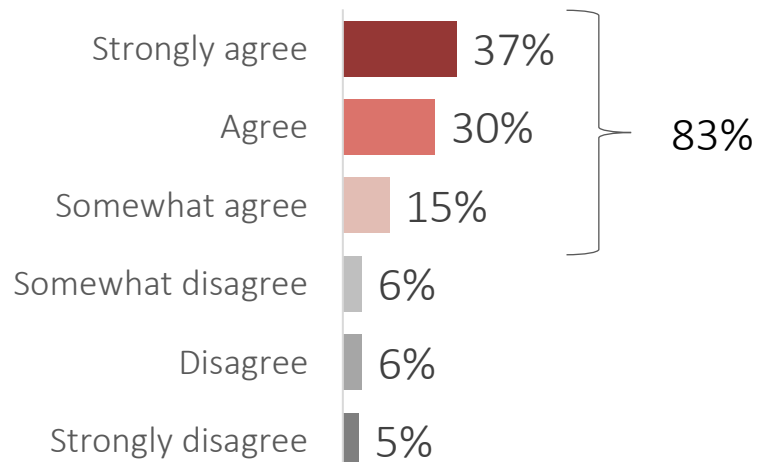
Staff in my department have been regularly available to **meet with me in person.**



N=344

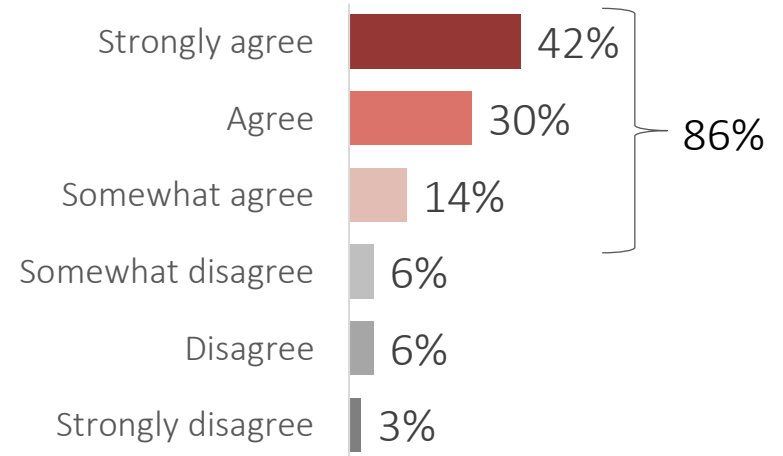
# Faculty are generally satisfied with staff support & work quality

I have **been satisfied with the support that I have received from staff** in my department



N=344

Staff in my department have been consistent in **delivering quality work**



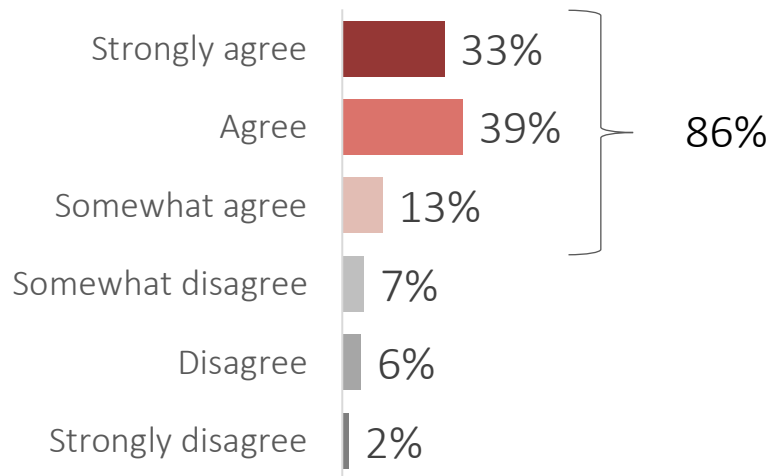
N=344

# Graduate Students

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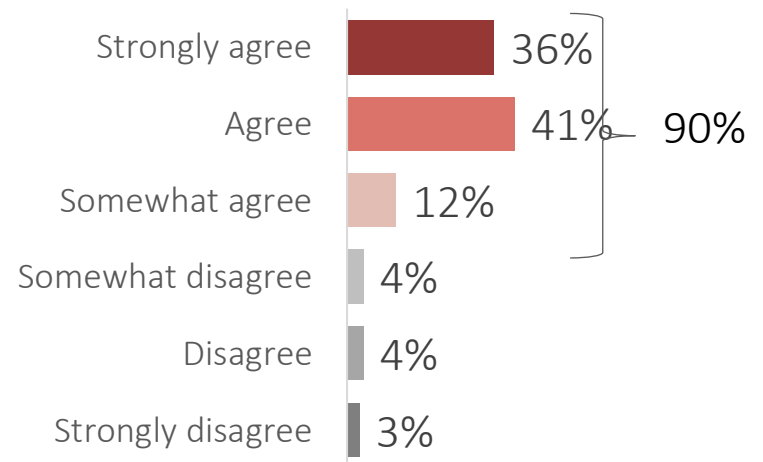
# Graduate students generally agree faculty & staff are available to meet in person

**Faculty** in my academic program have generally been available to meet with me in person



N=392

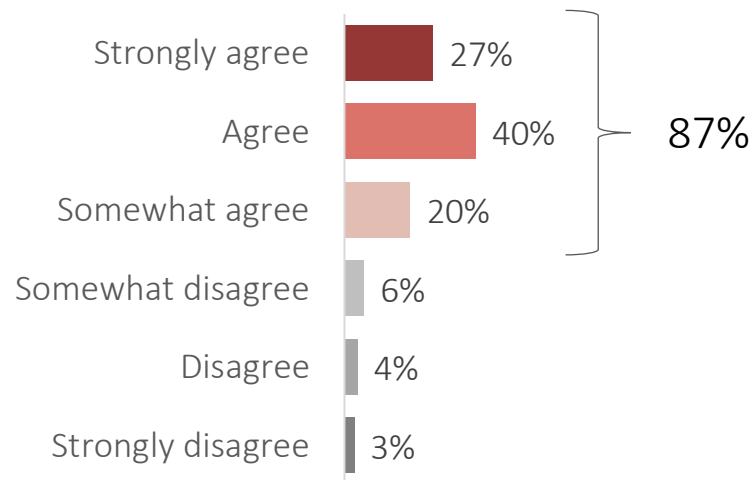
**Staff** in my academic program have been generally available to meet with me in person



N=398

# 87% of graduate students generally agree GSAS staff are available to meet in person

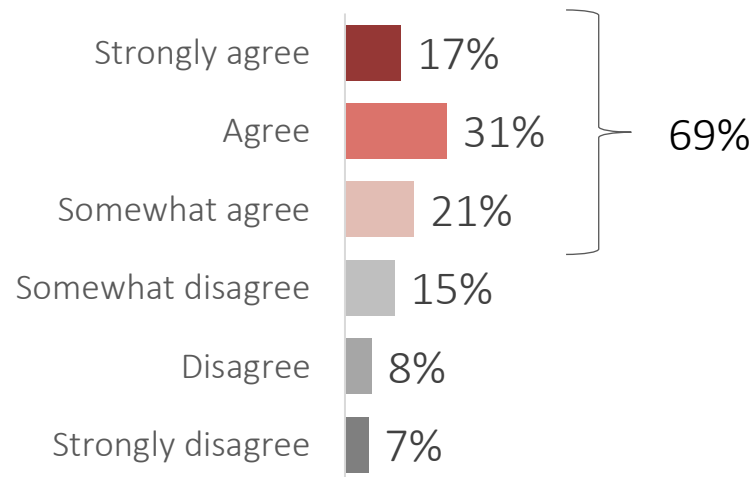
Staff in the GSAS Office of Student Services have generally been available to **meet with me in person**



N=334

# When dropping into an office at Harvard w/out appointment, 69% of grad students find staff present to receive them

Often when I drop into an office at Harvard without an appointment, there are **generally staff present to receive me.**



N=336

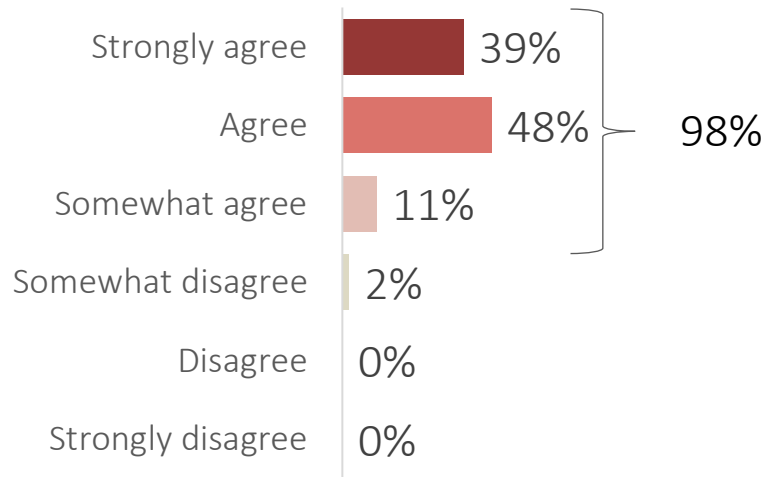
# Undergraduate Students

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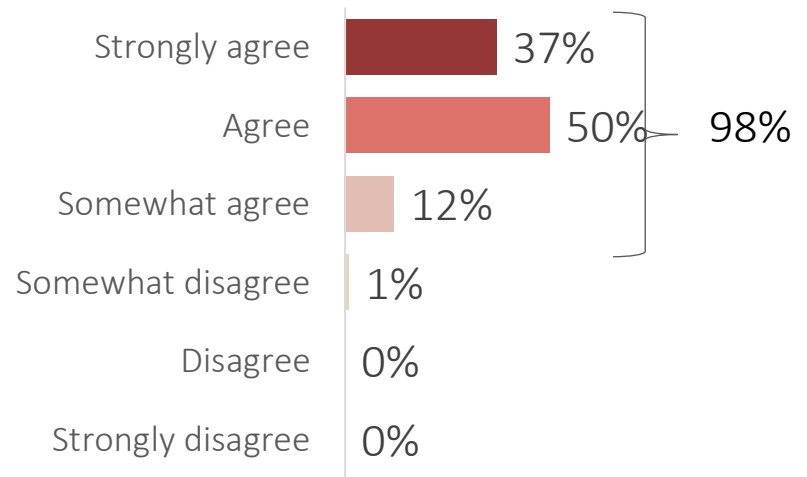
# Nearly all first-year students feel faculty & staff are available to meet in person

**Faculty** have generally been available to meet with me in person



N=708

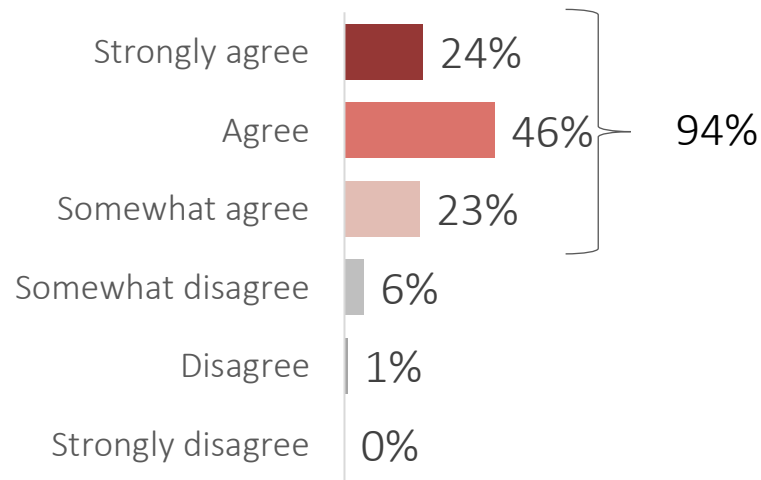
**Staff** have generally been available to meet with me in person



N=710

# When dropping into an office at Harvard w/out appointment, 94% of UG students find staff present to receive them

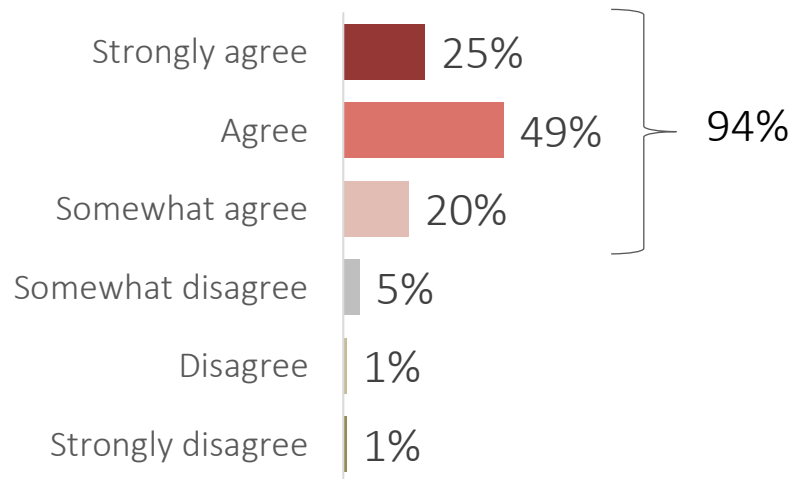
Often when I drop into an office at Harvard without an appointment, there are **generally staff present to receive me.**



N=692

# 94% of first-year students generally agree staff have been available to provide guidance and support

I feel like **Harvard staff have been available to provide guidance and support** in helping me navigate my educational experience



N=700

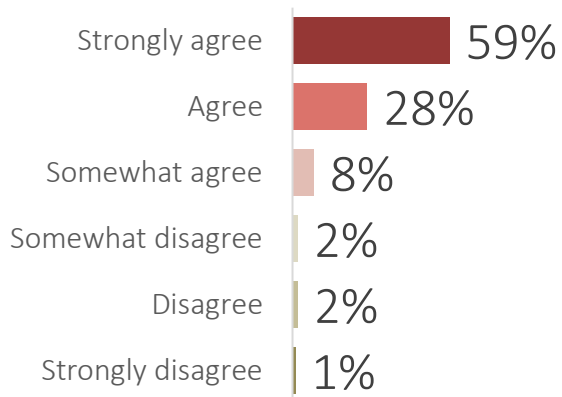
# Staff

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# Staff generally agree that communication is quick and easy with their supervisor & colleagues in team or outside of team

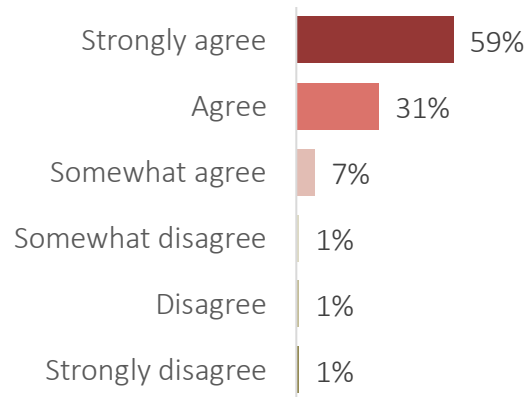
I can easily get in touch **with my supervisor** without substantial delay.

95% Agree



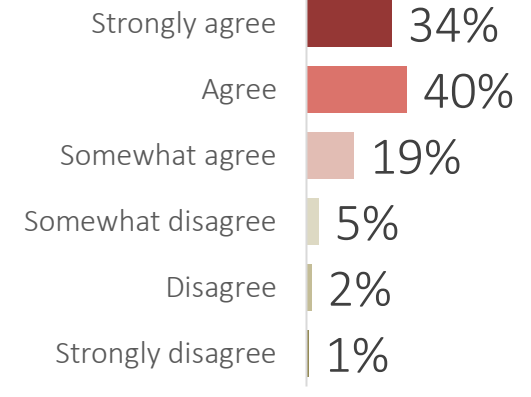
I can easily get in touch **with a colleague in my team** without substantial delay.

97% Agree



I can easily get in touch **with a colleague outside of my team** without substantial delay.

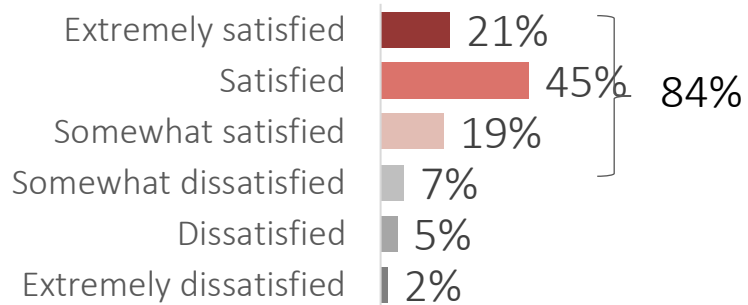
93% Agree



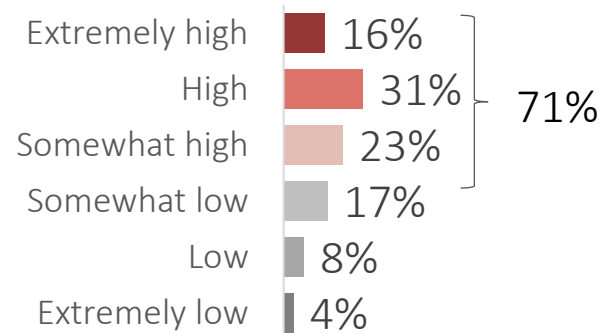
# Staff Job Satisfaction, Morale, and Community

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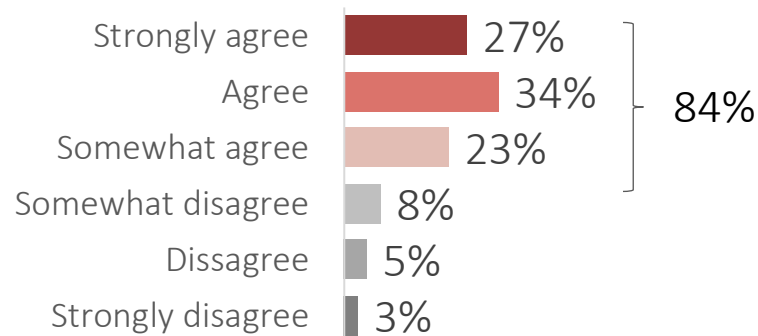
## Job Satisfaction



## Level of Morale

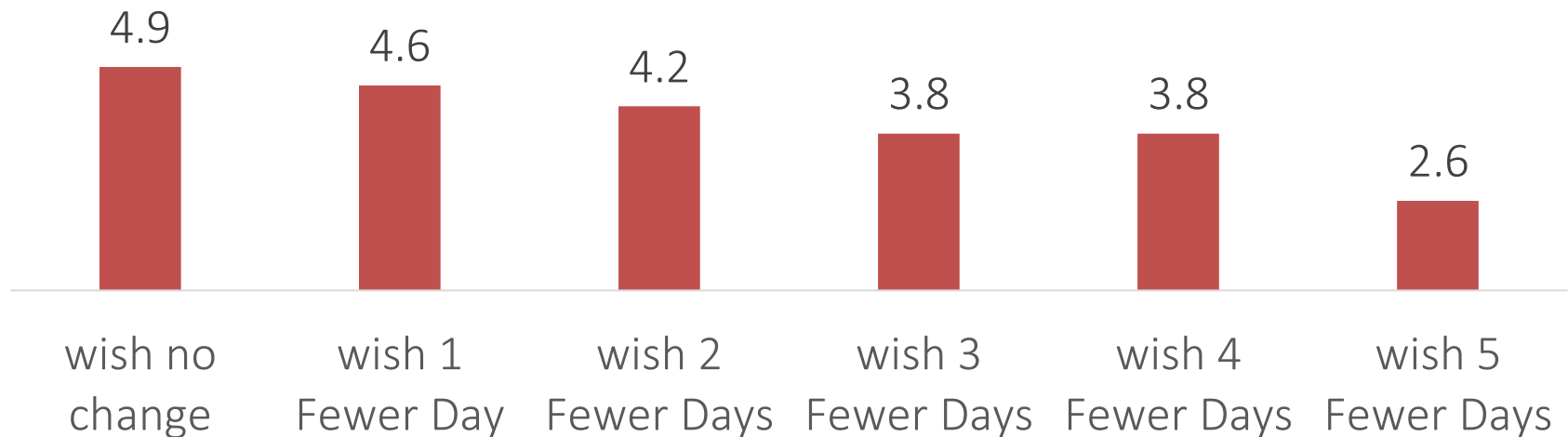


## Strong sense of belonging to colleagues in my team



Job satisfaction is lower for staff who want to be on campus less frequently. Same pattern holds for morale.

Average Job Satisfaction by "Frequency Delta"



1=Extremely dissatisfied, 2=Dissatisfied, 3=Somewhat dissatisfied, 4=Somewhat satisfied, 5=Satisfied, 6=Extremely satisfied



# Management

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95% of managers have trust in staff to work remotely, but there are challenges.

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The most cited management challenges:

28% of manager find it **difficult to manage** staff remotely

30% find it challenging **to keep track of different work schedules**

24% feel **office coverage** can be challenging, especially for smaller units

Comments made by managers also address:

**Lack of prescriptive guidelines** leave managers little to fall back on when trying to justify why certain staff can or can't work from home

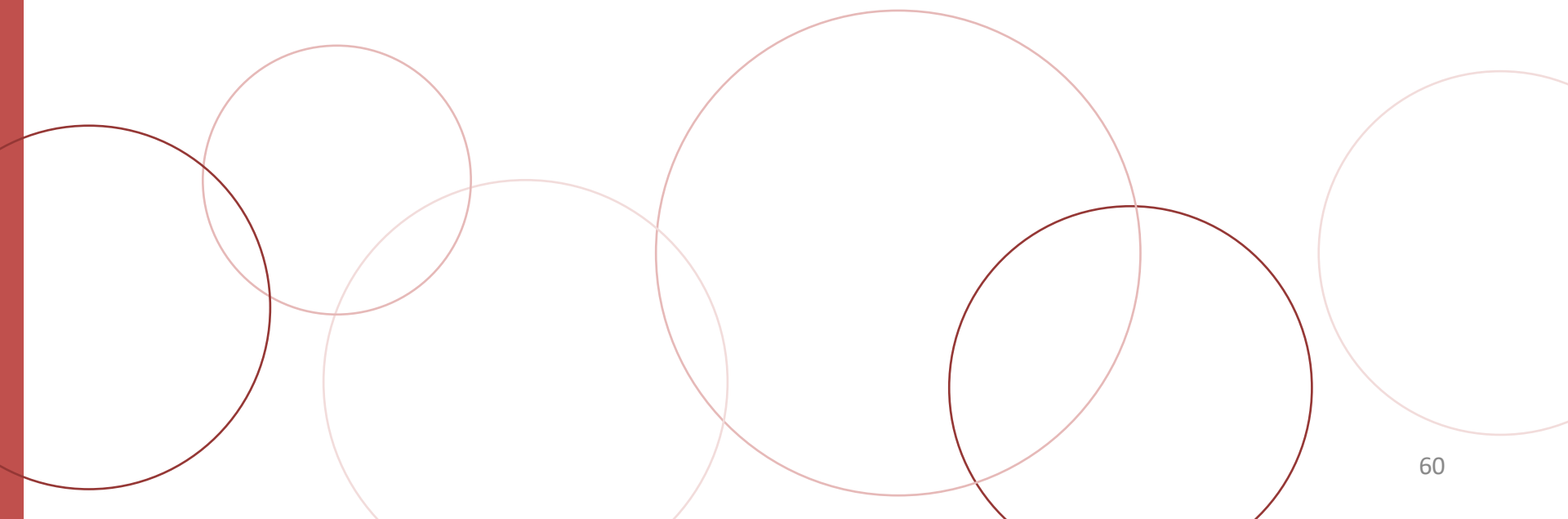
Between and within unit variability causes staff to question managers why they can't work from home when others can – becomes an **EQUITY** issue

The percentage of managers reporting challenges is small.

	% Strongly agree, Agree, Somewhat agree N=571
I have <b>trust</b> that my employees are actually working (as opposed to slacking off) when they are off campus.	95%
I find it challenging <b>to keep track of different work schedules.</b>	30%
I find it more <b>difficult to manage</b> staff when they are working remotely.	28%
I am finding it difficult to ensure that we have enough in-person/on-campus " <b>coverage</b> " in my team.	24%
I fear that <b>personal activities at home</b> interfere with some of my staff's ability to complete their work in a correct and timely fashion.	20%
I often <b>feel out of the loop</b> when my staff are working from home.	17%
When my staff are working from home, I find it difficult to get my <b>questions/queries answered</b> from some members of my team just in time when I need it.	15%
Some of my staff are just <b>not very productive</b> when working from home.	15%

# Benefits of Hybrid

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## “Why working remotely is important to you”

	N=1125
Gives me more flexibility to <b>balance my work and personal responsibilities</b> (family responsibilities, child/elder care, self-care)	64%
Reduces my <b>commute time</b>	62%
It is more conducive workspace at home that increases my <b>work efficiency</b> (nicer space, fewer distractions, more comfortable)	50%
<b>Saves money</b> (on gas, parking, childcare, food, work clothing)	39%
There is no point commuting, When I come to campus, <b>there is no one in the office and/or all my meetings are online</b>	23%
Allows me to work more autonomously ( <b>set my own schedule</b> )	17%
I have concerns about my <b>health</b> (catching Covid)	15%
Allows me to manage <b>toxic work relationships</b> (being able to disengage/establish boundaries from negative workplace behavior)	11%
Since the pandemic, I <b>moved</b> to a location that I do not consider to be within a commutable range	5%

# Challenges of Hybrid

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## Staff identified some additional challenges/concerns in the open-ended comments:

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1. Attracting and retaining talent
2. Fairness and equity issues
3. Not all staff like working from home
4. Withdrawal behaviors (working a side job, not showing up at work on required days, not being responsive, etc.)
5. Managing schedules and planning for coverage
6. Onboarding new employees
7. Zoom fatigue

# Summary

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# Summary

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- The benefits of hybrid work outweigh the challenges especially considering the significant risk of attrition if FAS were to reduce flexibility
- The hybrid schedule helps with morale, workplace commitment and supports better mental health and wellbeing
- Managers and staff self-report that the increased flexibility of their hybrid schedules has improved their own productivity
- Faculty and students agreed that staff are accessible and that their needs are being met

*However -*

- The FAS is losing employees to other schools at Harvard that offer more flexibility
- Supervisors find it challenging to manage staff in the hybrid environment and need additional training and support to build their skills and confidence
- Coordinating schedules and managing coverage has not been seamless
- Variation in work schedules has resulted in staff questioning the fairness of who can work from home

# Appendix

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# Faculty Mode of Communication & Satisfaction

		Primary Mode of Communicating for One-on-One Meetings			
One on one meetings with:	N	% In Person	% Video conferencing	% Phone	% satisfaction
Undergraduate Students	329	83%	17%	0%	96%
Graduate Students that I teach	253	87%	13%	0%	98%
Graduate Students that I am advising	259	75%	24%	1%	98%
Post-docs	181	83%	17%	1%	98%
Staff in my Department	332	57%	36%	7%	89%
Staff Outside my Department	211	18%	74%	8%	89%
Faculty peers in my department	341	67%	29%	4%	92%
Faculty Peers outside my department	287	38%	59%	3%	89%
Administrative Meetings In My Dept	322	55%	45%	0%	83%
Administrative Meetings In My Dept	263	83%	16%	1%	81%

# GSAS Mode of Communication & Satisfaction

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One on one meetings with:	N	Primary Mode of Communicating for One-on-One Meetings		
		% In Person	% Video conferencing	% satisfaction
My academic advisor	503	69%	31%	92%
Faculty	488	71%	29%	89%
Undergraduate students	283	84%	16%	92%
Post-docs	313	87%	13%	96%
Colleagues in my lab	257	90%	10%	96%

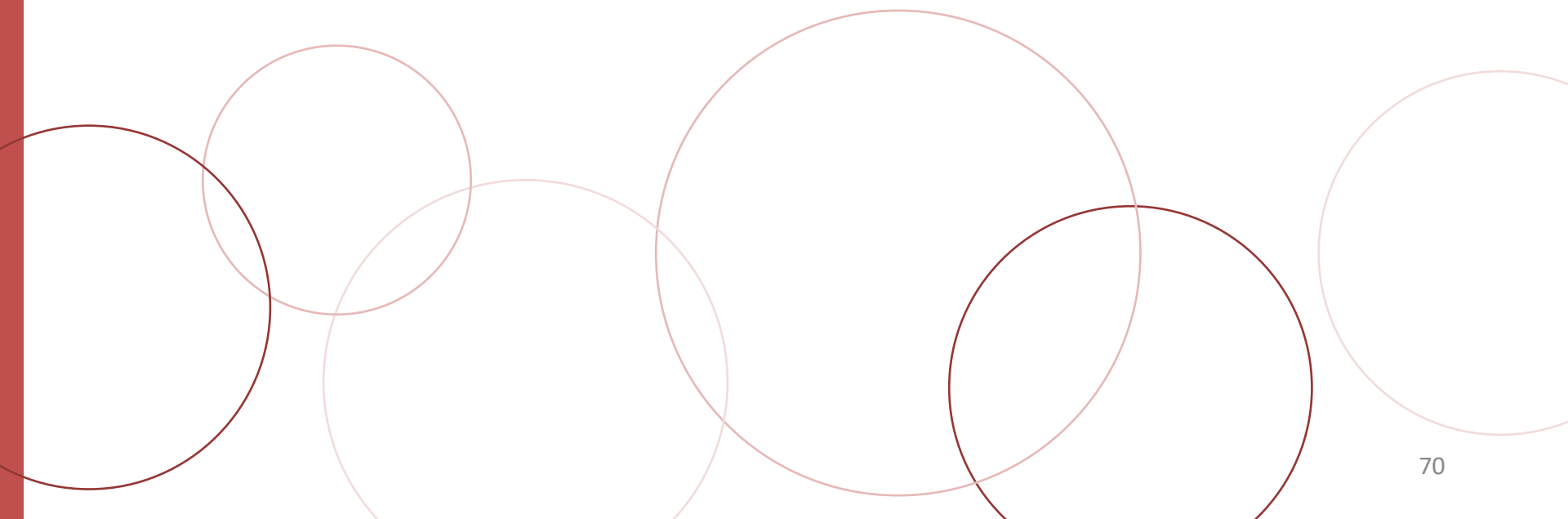
# UG Mode of Communication & Satisfaction

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		Primary Mode of Communicating for One-on-One Meetings		
One on one meetings with:	N	% In Person	% Video conferencing	% satisfaction
Faculty	684	86.0%	14.0%	97%
Teaching Fellows	700	91.4%	8.6%	97%
My Academic Advisor	699	67.4%	32.6%	90%

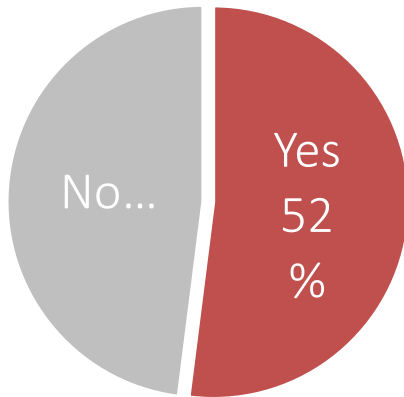
# Anchor Days

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# 52% of respondents reported team has Anchor Day

Does your team have anchor day(s)?



	N=1774
No, my unit does not have anchor days	48%
Yes, my unit has an anchor day(s) for the entire unit	43%
Yes, my unit has a different anchor day(s) for different teams within the unit	9%
Yes, my team has anchor day(s) but I am fully remote and am not on campus with the team	1%
Total	100%

## Anchor days could be better utilized

	N	Agree
Anchor days help me <b>remain connected</b> to people in my team.	887	82%
My supervisor utilizes anchor days with <b>intentionality</b> (in person communications, answering questions, convening the team, building community, reviewing work/priorities, etc.).	878	71%
Anchor days are <b>used to go over important projects</b> , priorities and recent updates and/or changes that affect the team so that everyone is on the same page.	884	69%
Anchor days give me opportunities to meet with my supervisor and get my <b>questions answered or feedback</b> on my work.	882	65%
On anchor days, <b>I generally work alone in my office</b> without much interaction with others.	885	46%



# Only 16% of staff without anchor days want them

*“Would you like for your unit to establish anchor days?”*

Current on campus frequency	N	No	Yes	I'm not sure
0, 1, 2 days	187	63%	11%	27%
3 days	105	53%	17%	30%
4+ days	126	37%	20%	44%
Total	418	50%	16%	34%



# FY23 Non-Union Performance Management Updates

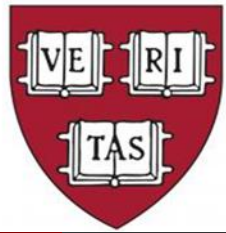
**Tiffany Jadotte**

*Associate Dean for FAS Human Resources*



# FY23 Non–Union Performance Management Process

- Ratings will be encouraged in the FY23 non-union performance appraisal process. FAS employees' FY23 work can be given “no rating” or can be assessed by their manager on Harvard’s qualitative rating system for the purposes of making annual compensation decisions.
  - *Exceptional Impact*
  - *Full/Consistent Impact*
  - *Learning/Building*
  - *Needs Improvement*
- In ASIP (Annual Salary Increase Planning tool), non-union employees who receive “no rating” in the system will be defaulted to a 3.5% increase.
- A rating of *Exceptional Impact* will be required if an Exceptional Performance Bonus is to be awarded.
- FAS employees should fill out the FY23 performance management form in People Soft and have a conversation about their FY23 performance with their manager.
- **We will be moving to ratings required for the FY ‘24 non-union compensation cycle.** Additional trainings and resources will be available in July ‘23 (referenced in following slide) for faculty managers and staff to get a better sense of how to use the performance management cycle as a development tool.



# FY23 Non-Union Performance Management Process

## FY24 Non-Union Performance Management Process Proposed Timeline

Timeframe	Action
July 2023	Launch communication for the FY24 non-union performance management cycle with resources and dates of forthcoming performance management workshops.
September 2023-May 2024	FAS HR offers trainings and resources on topics related to the performance management cycle.
September 2023 and March 2024	Communications to staff about importance of continued coaching conversations; reminder for staff to keep track of accomplishments over the course of the fiscal year; preparing for meeting with manager or employees to discuss the appraisal.
June 2024	Reminder email that FY24 performance management is closing.



# Administrative Operations Initiatives

**Mary Ann Bradley**

*Associate Dean for  
Administrative Operations*

**Stephanie Nasson**

*Senior Director of Administrative  
Operations*

**Maureen Berry**

*Director of Project and Change  
Management*

**Sean McQuarrie**

*Director of Procurement  
Operations*



# Administrative Operations Initiatives

## Upcoming Projects

*Q4 2023 – Q3 2024*

### Near Term

*Q4 2023*

- Day-in-the-life engagement
- Website terms of use audit
- 1Password availability
- Credit Card Policy Focus Groups

### On Deck

*Q2 2024*

- Univ. Credit Card Policy
- Electronic I-9 roll outs end
- eShip Global launch in B2P



### Upcoming

*Q1 2024*

- Electronic I-9 roll outs start
- Digital Accessibility Policy
- FileShare: Managed SharePoint migrations con't

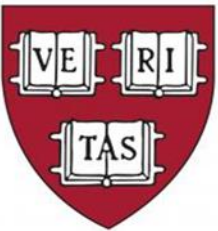
### Future

*Q3 2024*

- FAS Data Hub
- Jabber softphone app update & adoption campaign
- Harvard Phone infrastructure upgrade

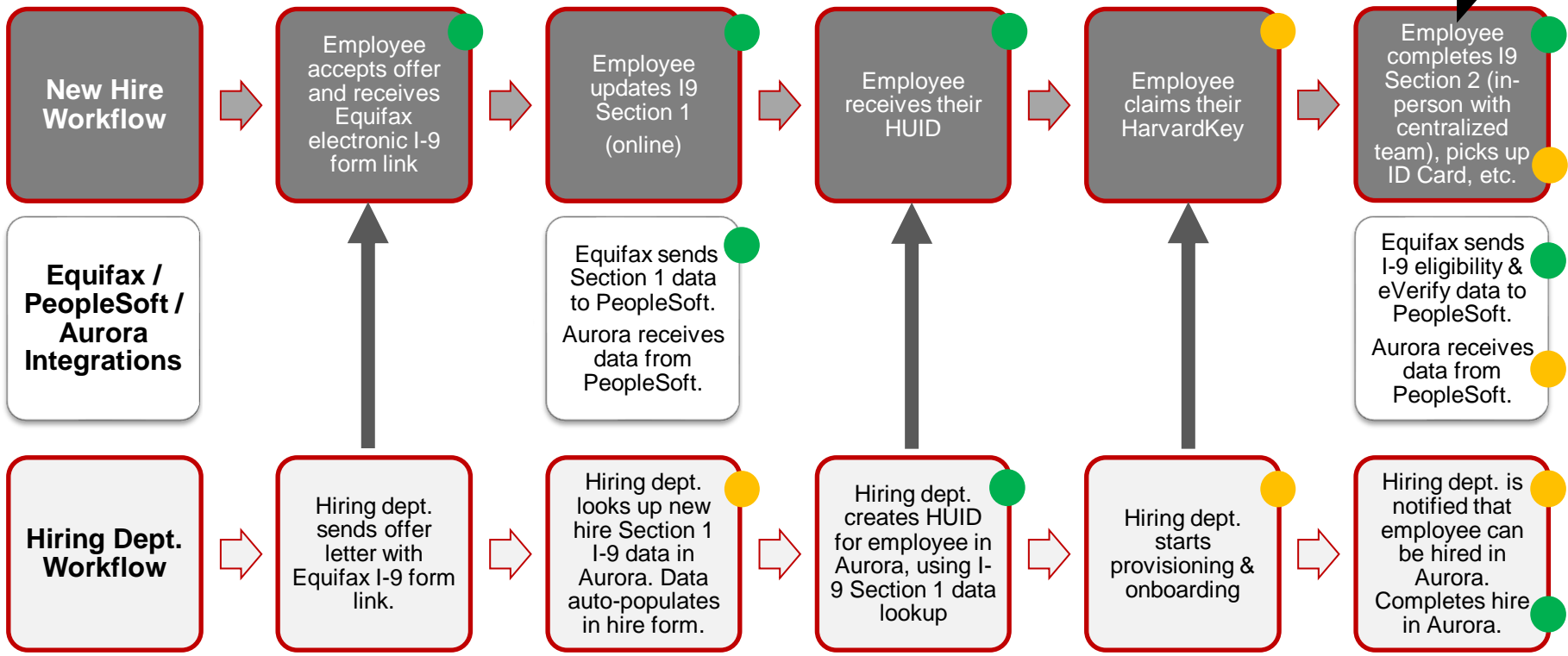
### Recently Completed

- JAN: PCard to Concur
- MAR: FAS AD Migration



# Electronic I-9: Working Vision for Future State

**Reminder:** Hiring manager or DA is **only** able to submit a hire **after** I-9 Section 2 is completed



- New and completed
- In progress



# Electronic I-9 Project Updates

## Complete

- Data feed between Equifax and PeopleSoft
- Data look up between Aurora and PeopleSoft

## In Progress

- Analyzing hiring data
- Integrating back-of-house approvals into ideal state hiring workflow
- Creating best practices for requesting temporary SSN assignments

## Upcoming

- Phased roll out schedule for Divisions / Tubs
- Updated Aurora Hire Action training
- Future Aurora enhancements aligned with I-9 submission & hire action timing

PEOPLE CREATE NEW ACTION ACTIONS POS

### New Action - Hire

Action Information

Action Number	<input type="text"/>
Action Type	Hire
Effective Date	<input type="text"/>
Requisition Number	<input type="text"/>

Personal Information ?

HUDID	<input type="text"/>
First Name **	<input type="text"/>
Middle Name	<input type="text"/>
Last Name **	<input type="text"/>
Suffix	<input type="text"/>
Date of Birth *	<input type="text"/>
Gender **	<input type="text"/>
SSN **	<input type="text"/>
Retype SSN **	<input type="text"/>
Tax Residency **	<input type="text"/>
I-9 on file	Will be shown after Save/Submit.
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/African American

Equifax Search ?



# Oracle EBS 12.2 Project Cutover and Outage Schedule

- **When is the outage for Oracle E-Business Suite (EBS)?**
  - **Tuesday 4/18/2023 (5PM) through Monday 4/24/2023 (8AM)**
    - Additional details about this week:
      - Patriot's Day is on Monday (4/17)
      - 3Q Quarter close is complete (4/14)
      - School vacation week
- **What will be the impact?**
  - Oracle EBS Financials modules will be offline
  - Buy-to-Pay system will be unavailable
  - Chart Validation will be offline
  - HART will be available
  - To learn more, see our Release Notes

# Oracle Outage Impact: Oracle EBS/Financials

The following **Oracle EBS Financials** modules will be offline:

- Accounts Payable
- Accounts Payable Adjustment Form for Assets
- Accounts Receivable
- CAPS
- Cash Management (CMRA)
- Chart Security Maintenance Application (CSMA)
- Chart of Accounts (COA)
- Fixed Assets
- General Ledger
- GL-PCR
- iPro Requisition History Inquiry
- iReceivables & Collections
- Web ADI
- Web Reimbursement History Inquiry

# Oracle Outage Impact: B2P

The Buy-to-Pay system will be unavailable effective 5PM on April 18<sup>th</sup>.

This includes the ability to view/search in B2P, and all Accounts Payable, Supplier Onboarding, Requisitioning/PO/PR/NR, Contract Management, and Sourcing activities and functionality.

Key Activities	Dates
<b>Supplier Onboarding, Maintenance, &amp; Reactivation</b> (New requests or supplier updates)	<b>Wednesday, April 12<sup>th</sup> 5PM</b>
<b>Non-standard Check Processing</b> (Special Handling)	<b>Monday, April 17<sup>th</sup> 5PM</b>
<b>PR/NRs</b> that must be paid prior to outage should be approved by end of day.	<b>Monday, April 17<sup>th</sup> 5PM</b>
<b>Final payments before outage</b> (Includes Zelle, check, Paymode)	<b>Tuesday, April 18<sup>th</sup></b>
<b>All requisitions</b> must be fully approved by 4:30 to have a PO created before outage.	<b>Tuesday, April 18<sup>th</sup> 4:30PM</b>

HUIT

# Oracle Outage Impact: Concur (Expense & PCard)

	Due by
<b>Concur Expense Reports</b> must be fully approved with no exceptions to be paid prior to the outage	<b>Friday, April 14th, 5PM</b>
<b>Concur Statement Reports (PCard)</b> must be submitted and fully approved to post to the GL	<b>Monday, April 17th, 5PM</b>

- Concur users will still be able to create, submit, and approve Expense and PCard Statement Reports in Concur.
- Payments and postings to the GL will not occur during the outage but will resume on a normal schedule starting Monday 4/24.



# Support Updates

- **FAS Meal Guidelines:**

- Based on department feedback, we are increasing the meal limits effective July 1:
  - Breakfast - \$30
  - Lunch - \$50
  - Dinner - \$125
- All limits include alcohol, tax, and tip

- **PCard Training:**

- The Central PCard project team has finalized the new University's online training for PCard in the Concur environment. Until recently, new PCard users need to complete the online training that refers to the 'Settlement System' in order to gain access
- This new deck was reviewed across all schools/tubs and is now available



# Support Updates

## Upcoming Leave or Vacancy?

*Use this checklist to ensure continuity within your unit*

### Concur (PCard/Expense)

Before any leave or vacancy begins:

- Set up an Expense Approval delegate
- Submit any open Expense reports

Ensure your department has:

- A Chart of Accounts approver
- An Expense Approver
- An Expense Preparer

*One person can hold multiple roles, but the three roles must be shared amongst at least two people to ensure operational coverage.*

### Buy2Pay

Before any leave or vacancy begins:

- Set up an Approver delegate for the departing staff

Ensure your department has:

- An active Department Requestor
- An active Supplier Portal user
- Approvers at all appropriate levels

### Aurora

Before any leave or vacancy begins:

- Ensure there is an department Action Initiator
- Ensure there is an department Action Approver
- Confirm departing staff's access, and mirror if necessary

### PeopleSoft

Before any leave or vacancy begins:

- Generate list of department Time & Labor and Absence Groups and delegate approver duties

Ensure your department has:

- Staff trained on Student, LHT, and Temp QuickHires
- Staff responsible for running Payroll Registers

### Resources

- Concur Knowledge Center
  - [travel.harvard.edu/concur-training](http://travel.harvard.edu/concur-training)
- Buy2Pay Training Center
  - [b2p.procurement.harvard.edu/buy-pay-project](http://b2p.procurement.harvard.edu/buy-pay-project)
- Aurora Knowledge Center
  - [about.aurora.fas.harvard.edu/knowledge-center](http://about.aurora.fas.harvard.edu/knowledge-center)
- System Access Request Forms
  - [finance.fas.harvard.edu/form-categories-if-applicable/access-request-forms](http://finance.fas.harvard.edu/form-categories-if-applicable/access-request-forms)

*Need assistance?*

[fasasap@fas.harvard.edu](mailto:fasasap@fas.harvard.edu)

If your vacancy is sudden, or cannot be covered by the remaining staff in your department/team, contact Admin Ops [fasasap@fas.harvard.edu](mailto:fasasap@fas.harvard.edu) as soon as possible to discuss coverage.

- Are we missing any financial applications?
- Is this easy to follow?
- Any additional information to include?
- Please send feedback to [adminops@fas.harvard.edu](mailto:adminops@fas.harvard.edu)



# Finance Fundamentals – remaining sessions

The Administrative Operations team is offering a full round of Finance Fundamentals with all six sessions starting this month.

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.

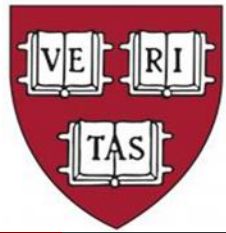
**Finance Fundamentals IV - Monitoring Funds**

**Finance Fundamentals V - Maximizing Funds**

**Finance Fundamentals VI - Mastering Procurement**

[Register in](#)  
[HTP](#)

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



# Ongoing Trainings

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

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

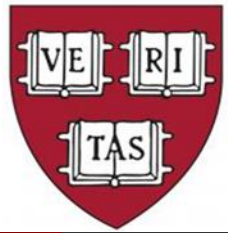
## Upcoming sessions include:

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

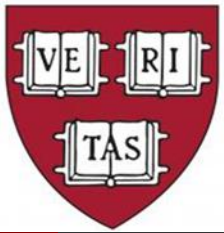
Please register for all classes in the Harvard Training Portal:  
<https://trainingportal.harvard.edu/>





# Save the Date!

Administrators' Town Hall:  
May 11, 2023  
2 – 4:00 p.m.



# Happy Spring!

