University of Central Florida Wahoo Project

Project Kickoff Meeting

January 17, 2017

Agenda

1. Attain Team
2. Attain Company Overview
3. Project overview
4. Phase I Scope of Work
5. Project Timeline
6. Questions and Answers

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Introductions

Attain Team

Mark C. Davis
Vice President and Partner,
Higher Education

- 30 years serving the Higher Education and Academic Medical Centers community
- Managing Director at BearingPoint & Partner at KPMG
- Business advisor to more than 80 universities , AMC's, research institutes

Evan Roberts
Project Manager and Pre-Award
SME

- 15 years serving the Higher Education and Academic Medical Centers Community
- Former Director of Pre-Award at a Major Academic Medical University
- Extensive experience assisting Universities in business process reviews, organizational effectiveness, and change management
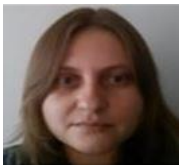
Nadia Kikilo
Manager and Post-Award SME

- 10 years serving the Higher Education industry
- Functional PeopleSoft expertise in grant accounting life-cycle
- Wide range of experience in financial regulatory compliance, system implementations, and process improvement

Attain Team

David Reefer
Project Consultant and Lead Research Systems and Applications

- 20 years serving the Higher Education and Academic Medical Centers Community
- Participated in many aspects of the project lifecycle, including project management, business analysis, design, configuration, testing, end-user training, developing user documentation, report and customization development, and post-implementation support.

Nicole Cohee
Project Consultant and Post-Award/Systems SME

- 10 years serving the Higher Education, Academic Medical Centers and nob profit community
- Experienced leader in Post-award administration, grant accounting, and PeopleSoft functionality
- Extensive experience working with all levels of administration, faculty and sponsors to grow and manage research funding from industry, private and philanthropic sources as well as from federal agencies.

Cindy White
Project Consultant and Pre-Award/Systems SME

- 20 years serving the Higher Education and Academic Medical Centers Community
- Former Director of Pre-award Administration at a Major Research University
- Expert in business process improvement, change management, and research administration lifecycle.

Attain Company Overview

Introduction to Attain

Who is Attain?

A management, strategy and technology consulting firm

- Founded in January 2009

- Headquartered in McLean, VA

- Innovative problem solvers who overcome today's most complex challenges

- Flexible and scalable to meet clients' unique and changing needs

- 100 percent focused on serving the public sector to achieve market-leading results

- A mission and vision based on three core principles:
  - Built-to-last
  - Next-generation
  - Values-driven
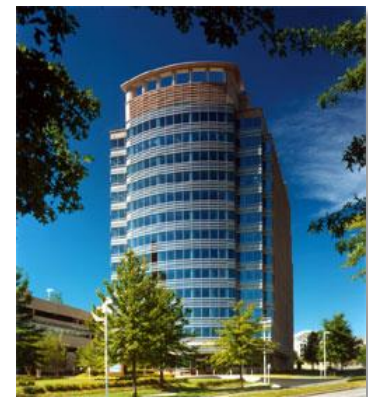
Introduction to Attain

Our Mission and Vision

A focused mission and vision for achieving:

➤ Market-leading results

➤ Next-generation services and solutions

➤ Values-driven consultancy

➤ Long-term success

Our Mission: *To provide the best transformational services to our clients by coupling proven performance and forward thinking to produce market leading results*

Our Vision: *To be an elite values-driven management, strategy and technology consultancy that's built to last*

Who We Serve

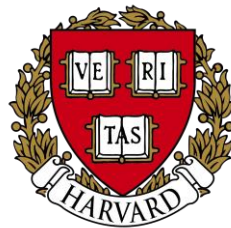## Representative Higher Education Clients

Services and Solutions

Research Administration

- F&A Reimbursement and Compliance
- Grants Management
- Federal Cost Policy and Compliance

Strategy and Management Consulting

- Change Management and Training
- Organizational Assessment and Redesign
- Program Management
- Strategic Finance and Risk Management
- Strategic Planning

ERP Services

Business Transformation

Health Information Technology

Cloud Services

Technology Consulting

- Infrastructure Management
- Business Analytics and Big Data
- Mobility

Experience

- Proposed project team has over 100 years of collective Research Administration operations experience

- Recent Business Process/Technology Reviews include:
  - <u>North Carolina State University</u>: BPR and eRA requirements assessment – *2016*

  - <u>Vanderbilt University Medical Center</u>: Research administration support in areas ranging from F&A rates, grant transfer to Clinical Trial management, systems and billing – *on going*

  - <u>Emory University</u>: Multi-phased support of the research administration life-cycle – processes, change management and research IT grants accounting, PeopleSoft implementation and upgrades

  - <u>University of Connecticut</u>: BPR, bench marking and system alignment analysis for research administration operations at Storrs and the Health Center campuses - *2017*

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Project Overview

Project Overview

- Current State Research Administration Life-cycle Assessment:
  - People
  - Process
  - Technology

- eRA Vendor Selection

- UCF Financials / PeopleSoft Environment Review and Assessment for PeopleSoft Grants Implementation and Optimization

- Change Management Initiatives

Goals

- Develop a complete understanding of UCF's current Research Administration strengths, areas for improvement, gaps, and alignment with future IT system functionality

- Solicit essential feedback from UCF stakeholders on current challenges in business processes and IT system limitations

- Pinpoint shadow systems in use, the rationale for shadow system maintenance, and future system functionality that can eliminate these systems

- Identify core functional and technical needs for future eRA and PeopleSoft Grant implementations

- Select final eRA vendor and develop eRA implementation plan

- Develop and refine UCF Financials /PeopleSoft Grants Implementation and Optimization plan

Scope Of Work

Phase I Components

- ✓ We will map, clarify and align current business operations and supporting systems with future system functionality;
- ✓ Findings during Phase I will lead to improved outcomes, refined business processes, and system optimizations for the pending eRA and PeopleSoft Grant Module implementations.

| Review Policies, Procedures, Business Practices | Review Organizational Structure | Stakeholder Interviews and Needs Assessment | Review Technology and Reporting | Final Recommendations |
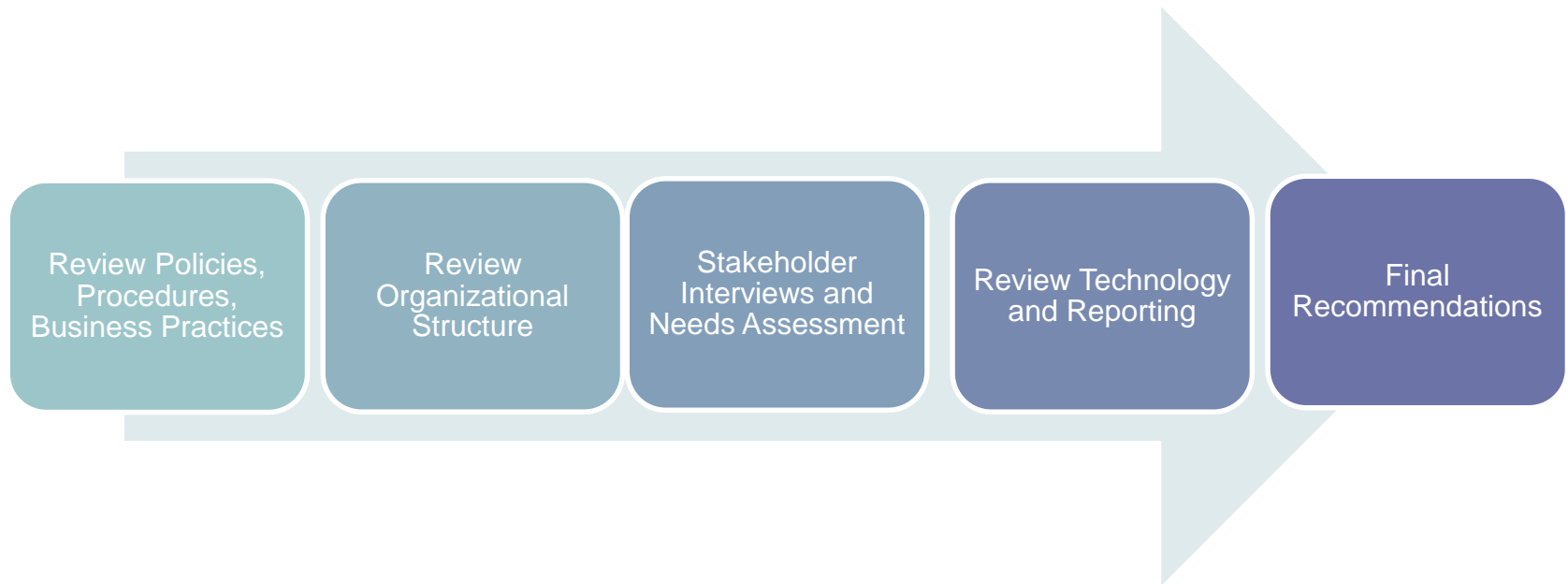
Business Process Review Approach

Part I   Project Organization and Initiation

Part II   Review and evaluation of UCF current pre-award, post-award and grant accounting, and eRA/ERP operations

       A. Stakeholder interviews

       B. Policy and Procedure Document Review

       C. Current IT System Review

       D. Organization Design and Structure Review

Part III Preparation and Presentation of Final Recommendations

Phase I Areas of Focus

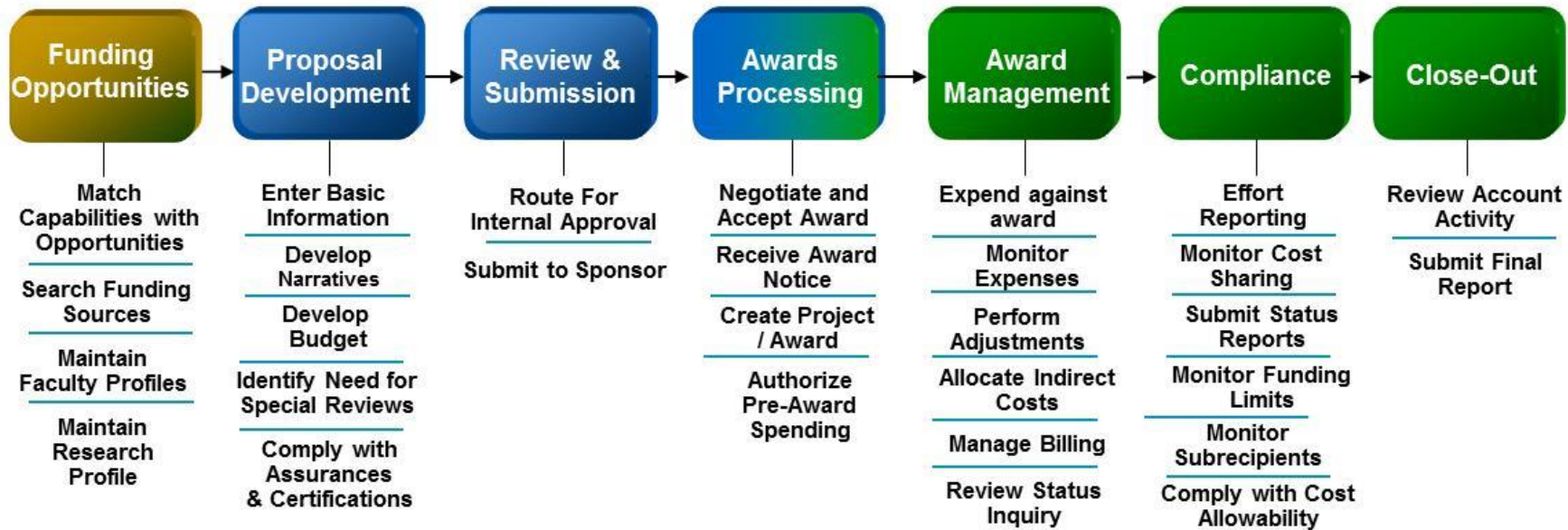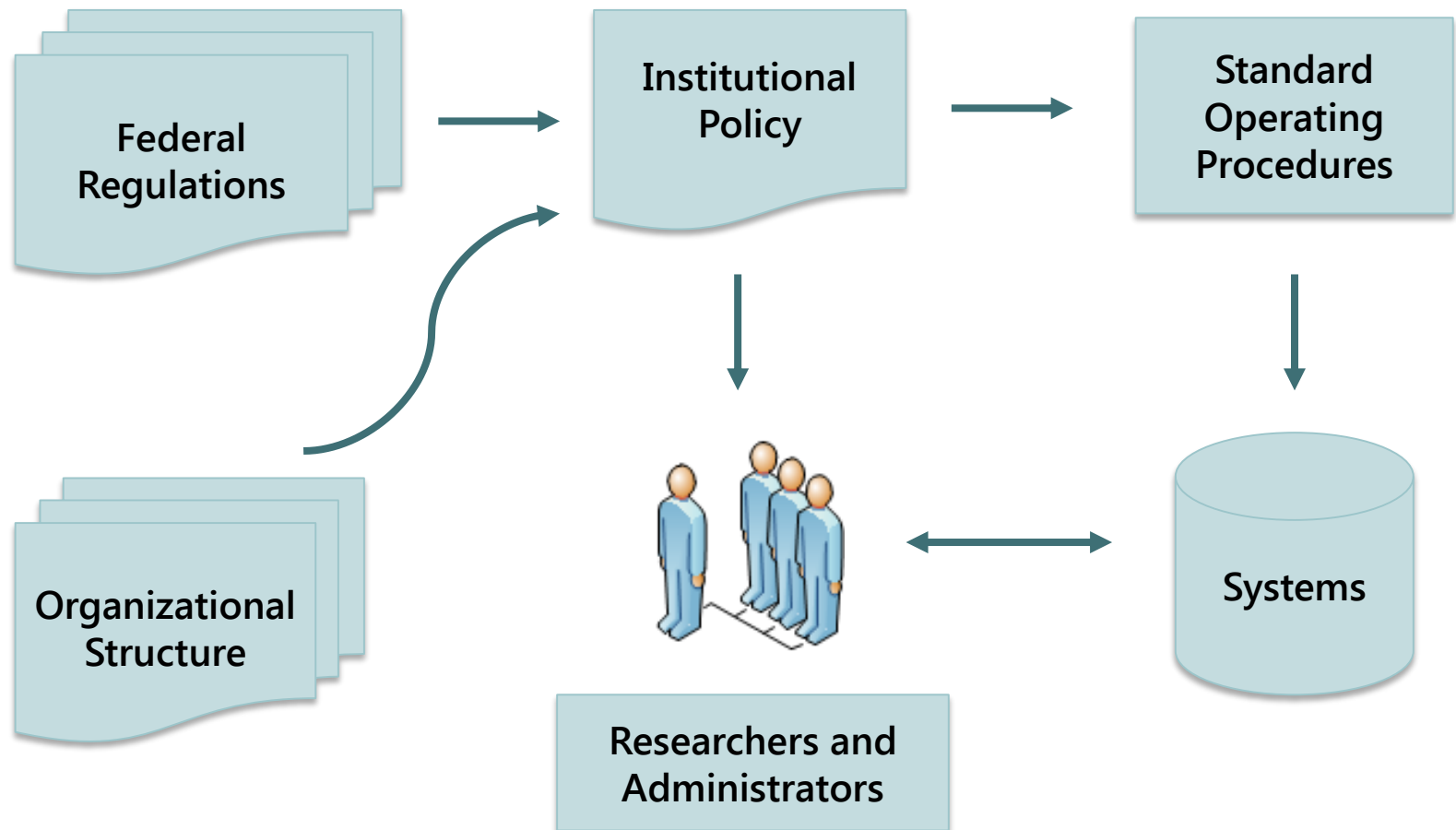|			
Proposal Development	Just-in-time Requests	Financial Conflict of Interest	Effort Verification
Award Set-up and Maintenance	Sub-recipient contracting and monitoring	Grant Accounting and Financial Compliance	Invoicing/Payment Management System
Final Financial Reports and Award Closeouts	Reporting	Export Controls	Regulatory Compliance

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Federal Grants Management Focal Points

Identify Funding   **Pre-Award / Proposal**   **Post-Award Accounting**

Funding Opportunities	Proposal Development	Review & Submission	Awards Processing	Award Management	Compliance	Close-Out
Match Capabilities with Opportunities	Enter Basic Information	Route For Internal Approval	Negotiate and Accept Award	Expend against award	Effort Reporting	Review Account Activity
Search Funding Sources	Develop Narratives	Submit to Sponsor	Receive Award Notice	Monitor Expenses	Monitor Cost Sharing	Submit Final Report
Maintain Faculty Profiles	Develop Budget		Create Project / Award	Perform Adjustments	Submit Status Reports	
Maintain Research Profile	Identify Need for Special Reviews		Authorize Pre-Award Spending	Allocate Indirect Costs	Monitor Funding Limits	
	Comply with Assurances & Certifications			Manage Billing	Monitor Subrecipients	
				Review Status Inquiry	Comply with Cost Allowability	

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# Calibrating Policies and Processes with your Information Systems

Project Management

Attain has worked with UCF to structure a communication plan that establishes a working bond between UCF and Attain. This includes:

- Detailed On-site schedule
- Scheduled conference calls
- Weekly progress updates
- Deliverable target dates
- Other communication mediums as deemed necessary

Project Timeline

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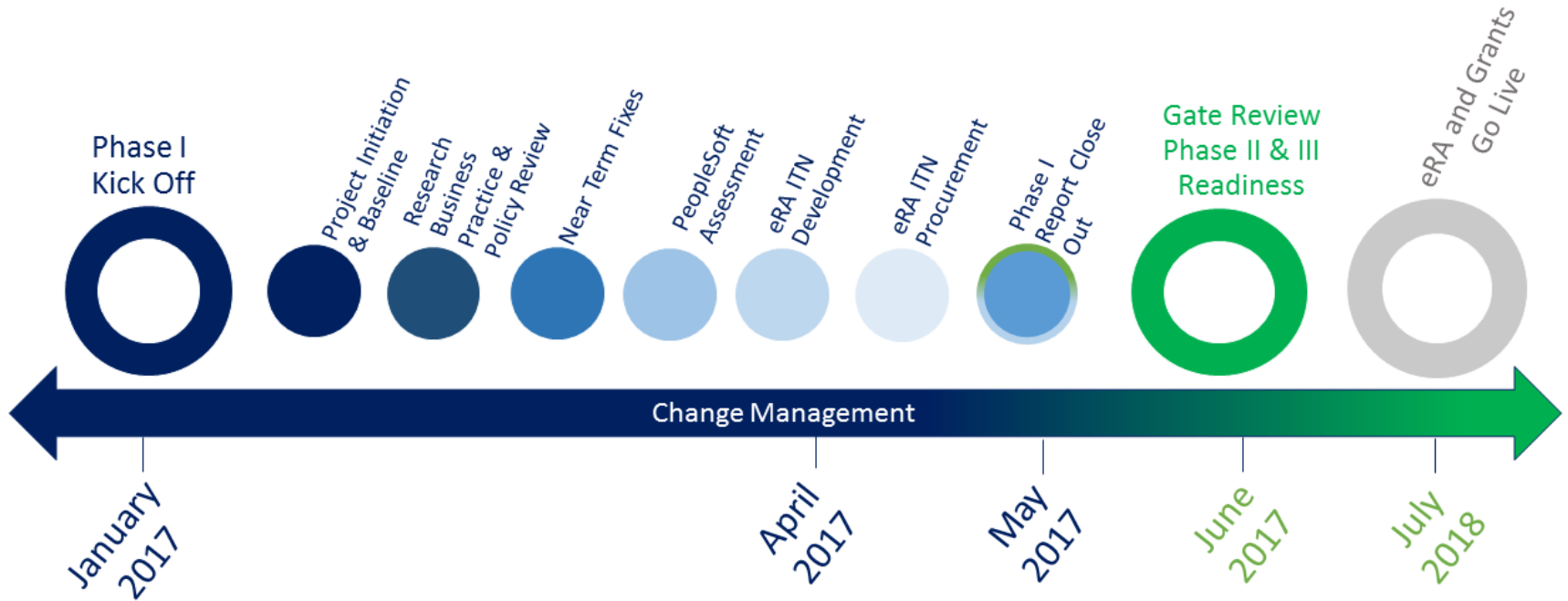
Questions?

Contact Information

Operating at the intersection of experience and innovation.

Mark C. Davis
Partner & Vice President
Higher Education and
Academic Medical Centers Practice
1600 Tysons Boulevard, Suite 1400
McLean, VA 22102
(t)703.857.2165
Email mcdavis@attain.com
www.attain.com