

Business Services Advisory Group





Today we will cover

- Progress on BSAG priority list
- Reporting Liaisons 2025 strategy
- Labviva update
- Procurement bypass
- Faculty performance reviews
- Journeys job structure review
- SPA – decreasing delays in award setup
- Budget Management & Planning System update



Progress on Process Improvements List: Shawn Hill

Wednesday, February 12, 2025



Progress on BSAG Priority List

Theme	Topic	Priority Score	
HR Data & Position Mgmt	Status of HR actions	72	COMPLETED: New salary actions dashboard released
HR Data & Position Mgmt	HR: transparency into transaction statuses	60	
HR Data & Position Mgmt	HR workflows, processing times, standardizing	45	
HR Data & Position Mgmt	Position Mgmt: Allow users to see other units desc	43	IN PROGRESS: Journey's project - job structure review
HR Data & Position Mgmt	Position Mgmt: Develop hiring pool; internal temp	40	
Process & Business Intelligence	Direct access to data to create reports	56	IN PROGRESS: OIR working on this architecture
Process & Business Intelligence	Create a centralized team that can develop process improvements using Smartsheet, Power Automate, Power BI and other tools to help college and units streamline their processes and make better informed business decisions	47	IN PROGRESS: 3 new positions in place or in posting
Process & Business Intelligence	System to prioritize HR/SPA transactions	42	
Process & Business Intelligence	General: Improve system transparency (workflows)	42	
Process & Business Intelligence	Central mechanism for policy change communication	41	IN PROGRESS: Office of Accreditation working on this
Process & Business Intelligence	Consolidated reporting	40	
Process & Business Intelligence	Define boundaries where units have policy authority	40	
Training & Best Practices	Standardized trainings for Business & HR staff	57	IN PROGRESS: First financial skills module in unit vetting
Training & Best Practices	More Centralized Training	55	
Training & Best Practices	Standardize best practices	48	
Training & Best Practices	Build best practices before new ERP	43	
Training & Best Practices	Develop data best practices	41	
Training & Best Practices	Supervisor training; available and required for all supervisors	40	



For awareness

The EITS team will host a breakout session **tomorrow** after the Status Call on the future of UGA's survey tools.



An aerial photograph of a large, white, classical-style building with a prominent portico supported by several columns. The building is surrounded by lush green trees and a well-maintained lawn. In the background, other campus buildings and a cityscape are visible under a clear sky. A semi-transparent dark grey box is overlaid on the bottom half of the image, containing white text.

Reporting Liaisons: Josh Hanna & Hailey Normandia

Wednesday, February 12, 2025



Reporting Liaisons 2025 Strategy

Key Takeaways

1. Working with OIR to rebuild operational reports in the Data Warehouse in Power BI

2. OIR Data Warehouse Operational Reports:
<https://oir.uga.edu/data/oper/financials/>

3. Volunteer for Subcommittees here:
<https://app.smartsheet.com/b/form/2dc4a0bc514e95991dcd39d983953a>

- Reporting Liaisons has a new strategy for 2025 to work with OIR to rebuild operational reports from the Data Warehouse in Power BI
- Seeking volunteers to serve on 4 subcommittees that will advise OIR and Reporting Liaisons on subset of reports:
 - Budget & GL Reports
 - HR & Payroll Reports
 - Research Reports
 - Metrics & Legacy Data



A large fountain with multiple jets of water spraying upwards is the central focus in the foreground. The water is clear and bright. In the background, a large, white, multi-story building with a dark roof and several dormer windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is a clear, bright blue. The overall scene is a peaceful campus setting.

Labviva & Procurement Bypass: Bob Currey

Wednesday, February 12, 2025

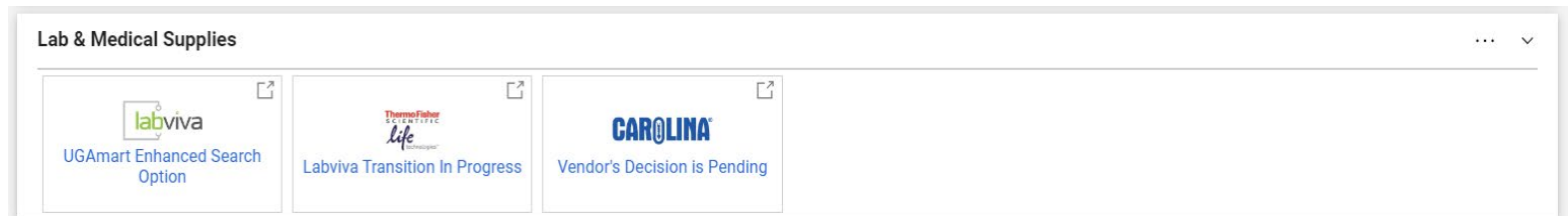


Labviva Implementation Update

Key Takeaways

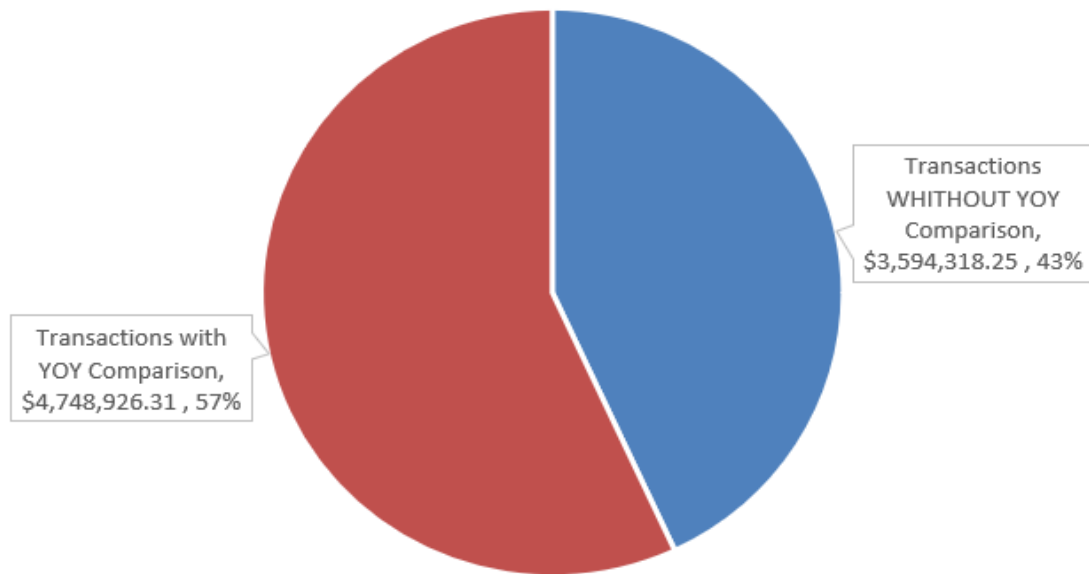
1. We appreciate the strong support and feedback from campus users since launch
2. To date, the system has processed 26K transactions and produced \$136K in YOY savings
3. Multiple enhancements to the functionality have been made based on UGA user feedback (with more planned!)
4. Keep the feedback coming!

- Labviva launched in UGAmart on July 8, 2024
- Labviva is a private UGA marketplace for Lab & Medical Supplies that provides price, availability and business details for multiple suppliers at once
- Through the first half of FY25, campus users have purchased 25,666 line items worth \$8.34M in the marketplace





Labviva Performance to Date



Transactions with YOY Data

(Matched Transactions Post vs. Pre-onboarding)

- Lower than prior year average
- Higher than prior year average
- Neutral (within negligible price difference)¹

# of Transactions	Savings	% Savings
4,349	\$ 301,970.33	19.0%
4,682	\$ (165,388.91)	-11.4%
2,024	\$ (524.37)	-0.1%
11,055	\$ 136,057.05	3.8%

Transactions WITHOUT YOY Data

(Marketplace Average Alternative Offer Baseline)

- Lower than current marketplace average
- Higher than current marketplace average
- Neutral (within negligible price difference)¹
- Single offer
- Unmatched punchout & quote orders

# of Transactions	Savings	% Savings
3,535	\$ 381,818.46	32.6%
382	\$ (11,169.84)	-9.6%
86	\$ 45.43	0.2%
3,365	\$ -	0.0%
7,243	\$ -	0.0%
14,611	\$ 370,694.05	7.8%

For the first half of FY25, the platform generated \$136K (or 3.8%) of YOY savings and up to \$370K (or 7.8%) in Cost Avoidance (not inflation adjusted)



Labviva Enhancements Since Launch

Q3 2024	Q4 2024
<p>Order History & Tracking</p> <ul style="list-style-type: none">•Detailed order history <p>Supplier badges on product detail page</p> <ul style="list-style-type: none">•View badges for all supplier offers <p>New header, footer, and site navigation</p> <ul style="list-style-type: none">•Improved UI, more prominent search bar, easier site navigation <p>Improved availability messaging</p> <ul style="list-style-type: none">•Clearer availability messaging and support for supplier contact info <p>UGA customizations</p> <ul style="list-style-type: none">•Passing additional data fields: supplier, order type	<p>Order History & Tracking</p> <ul style="list-style-type: none">•Addition of supplier order ID, estimated/actual ship dates, carrier, tracking number for consolidated bill orders <p>UGA customizations</p> <ul style="list-style-type: none">•Make “Name” a required field on quote orders

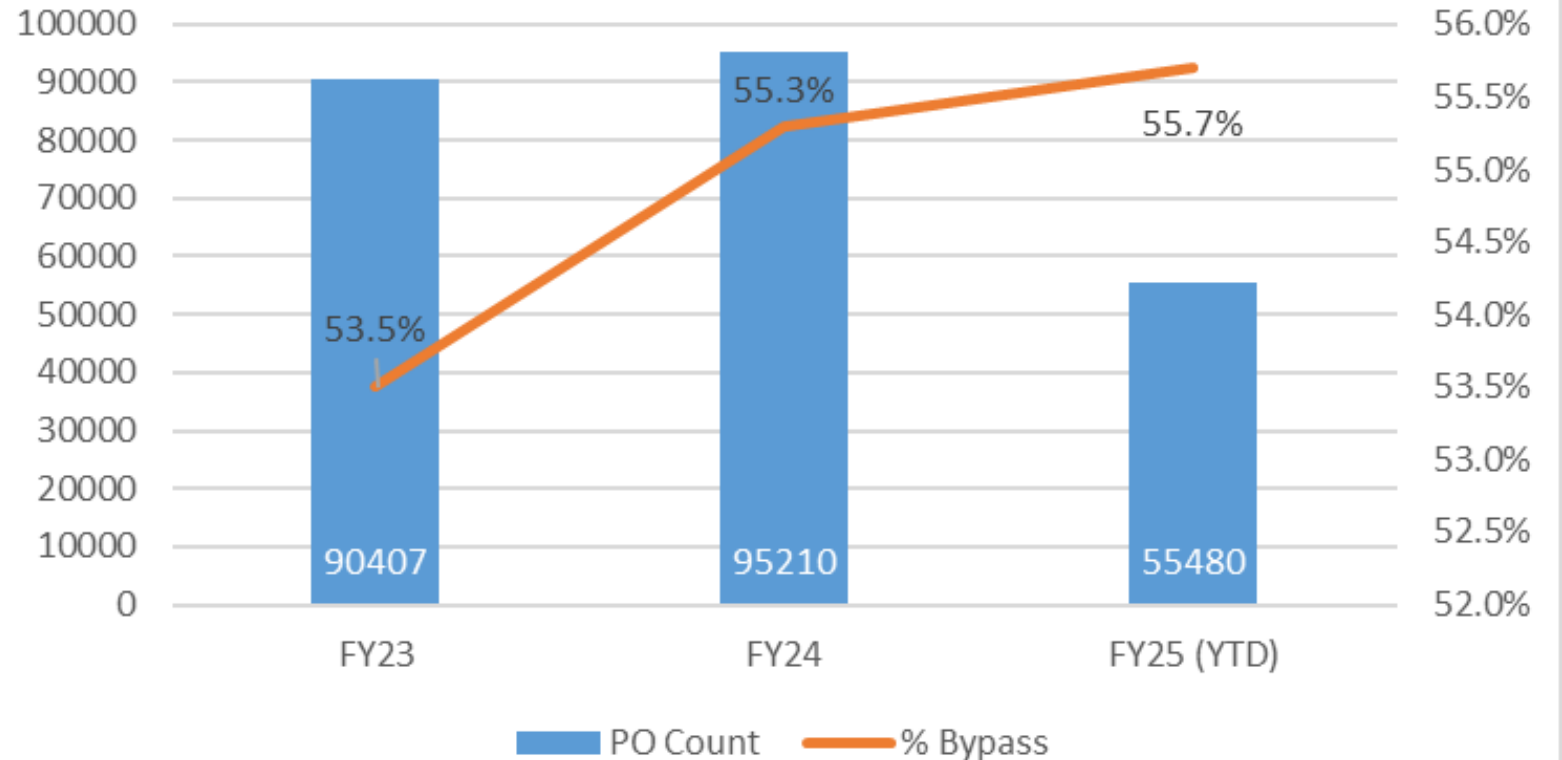


Procurement Bypass

Key Takeaways

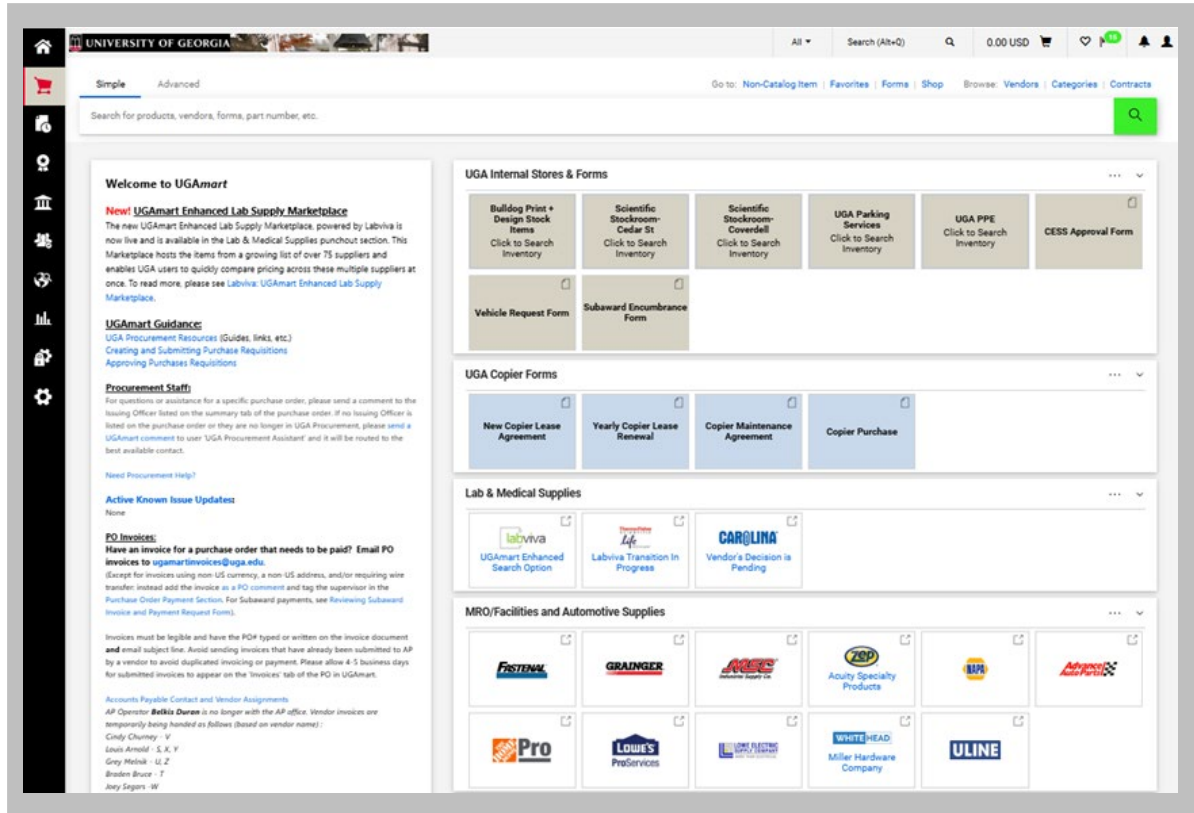
1. Continue to see YOY growth in PO demand with FY25 already tracking 4.7% higher YTD
2. Procurement continuing to expand UGAmart content options to increase volume of 'bypass' orders
3. Bypass orders are released straight to the supplier once approval workflows inside UGAmart are completed
4. *To accelerate order placement, make purchases from existing catalog or hosted content options in UGAmart*

PO Volume vs % Bypass





Procurement Bypass



Sample Workflow

- ✓ Submitted
3/23/2023 11:40 AM
Amanda Cummings
- ✓ Budget Check 1
Completed
- ✓ Department Approval
Approved
✓ Stephanie Rosso
- ✓ CESS Review
Approved
✓ Tonia Lumpkin
- ✓ Travel and Encumbrance
Approved
✓ Kathleen Green
- ✓ Budget Check 2
Completed
- ✓ Property Control
Approved
✓ Tashua Sands
- ✓ Post Award Accounting
Approved
✓ William Cone
- ✓ Procurement
Approved
✓ Donna Dorsey
- ✓ Buyer Assigned
Approved
✓ Tina Brown
- ✓ Budget Check 3
Completed
- ✓ Create PO
Completed
- ✓ Completed
3/27/2023 4:39 PM

Helpful Tips

- **Use punchout catalogs or hosted content with contract badge –**



Once approved, orders from these sources can bypass Procurement.

- **Use the right accounting -** Using the correct chart strings or speedtypes will reduce risk of budget check failure or downstream approval failures.
- **Plan for the approval workflow -** Orders processed late at night or on the weekend will be reviewed by required approvers & UGA central staff on the next available workday.

A large fountain with multiple jets of water spraying upwards is the central focus in the foreground. The water is clear and bright. In the background, a large, white, multi-story building with a dark roof and several dormer windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is a clear, bright blue. The overall scene is bright and sunny.

Faculty Performance Review: Sunshine Jordan

Wednesday, February 12, 2025



Faculty Performance Reviews

Key Takeaways

1. [Faculty Performance Reviews](#) webpage contains full instructions and details
2. Required by USG
3. FALs first point of contact for supervisors
4. Questions? Contact Office of Faculty Affairs

Visit website for full details



FACULTY PERFORMANCE REVIEWS

Annual Evaluations

The deadline for completing Spring 2025 annual evaluations, of calendar year 2024 performance, is **Monday March 31, 2025**. Details on this process are available below. The process will be available January 2025.

[View the process](#) ----->

Post-Tenure Review (PTR)

The deadline for completing Spring 2025 five-year and corrective post-tenure reviews is **Friday, April 25, 2025**. Outcomes for all PTRs must be submitted using [this form](#) (available 1/1/25).

[View the form](#) ----->

Review of Administrators

The deadline for completing Spring 2025 Reviews of Administrators is **Friday, April 25, 2025**. Outcomes for all Reviews of Administrators must be submitted using [this form](#) (available 1/1/25).

[View the form](#) ----->

Performance Plans

Fully approved Performance Remediation Plans (PRP) and Performance Improvement Plans (PIP) also must be submitted to the Office of Faculty Affairs by **Friday, May 2, 2025** using [this form](#) (available 1/1/25).

[View the form](#) ----->

Annual Evaluations	Post-Tenure Review (PTR)	Review of Administrators	Performance Plans
Spring 2025 annual evaluations for calendar year 2024 performance	Spring 2025 five-year and corrective post-tenure reviews	Spring 2025 Reviews of Administrators	Approved Performance Remediation Plans (PRP) and Performance Improvement Plans (PIP)
Due 3/31/25	Due 4/25/25	Due 4/25/25	Due 5/2/25



Annual Evaluations

Timeline

- **January - March 31:** Supervisors enter scores / allocation of effort
- **April 1 - April 30:** Units review
- **May 1 - June 29:** Office of Faculty Affairs final review
- **June 30:** Scores uploaded into OneUSG Connect.

Smartsheet

- Submit Annual Evaluation scores (1-5) for each effort area and overall
- Prepopulated with faculty data (snapshot 12/31/2024)
 - Missing from List – submit a ticket
 - Extra on List – mark as “not submitting”
- Allocation of Effort prepopulated with data submitted last year
- Faculty Affairs Liaison (FAL) can add Delegates

Annual Evaluations

Spring 2025 annual evaluations for calendar year 2024 performance

Due 3/31/25

Required

Full-time Faculty

Active during CY 2024



Not Required

Part-time faculty

Limited term faculty

Adjunct faculty

Admin A faculty





PTR, Admin Review, PRP/PIP

Post-Tenure Review (PTR)	Review of Administrators
Spring 2025 five-year and corrective post-tenure reviews	Spring 2025 Reviews of Administrators
Due 4/25/25	Due 4/25/25


Performance Plans
Approved Performance Remediation Plans (PRP) and Performance Improvement Plans (PIP)
Due 5/2/25

Form

- Outcomes “successful” or “unsuccessful” for each effort area and overall
- Date of this review and projected date of next review
- If applicable and fully approved, PIP may be uploaded (or submitted later)

Form

- Only final approved plan needs to be submitted

An aerial photograph of a large, modern stadium with a curved seating bowl, taken during a golden sunset. The sun is low on the horizon, casting a warm glow over the scene. The stadium's seating is a mix of red and grey. In the foreground, a large grey structure with the Stanford University logo is visible. The background shows a cityscape and distant hills under a dramatic, cloudy sky.

Journeys Job Structure Review: Laurel Palmer & Russ Ramsey

Wednesday, February 12, 2025









Journeys Job Structure Review

Key Takeaways

1. Deans, VPs, CBOs, and HR Liaisons received guidance on Jan. 27 regarding job structure reviews for their units
2. Key areas to review include: Job Family, Job Function, Track Levels
3. **Notes/requested action:** Common questions we've heard and any other questions while we're together as a group?

FW: Action Required: Job Structure Data Review and Validation Request

 Family & Function PDF.pdf	259 KB	 Career Track Guide.pdf	217 KB
 Leveling Guide.pdf	348 KB	 CUPA Codes & Descriptions.pdf	750 KB
 CUPA Codes & Descriptions.pdf	750 KB	 CUPA Codes & Descriptions.pdf	750 KB

Key areas to review:

- **Job Family:** A job family defines a group of jobs that require similar training, skills, and knowledge. Please verify that positions are correctly classified within the appropriate job families. Ex. Fiscal Affairs, Operations, Student Services
- **Job Function:** A job function defines a sub-group within a job family that represents a narrower work area. Please confirm that the descriptions accurately reflect the essential duties and responsibilities of each position. Ex. Accounting, Facilities & Grounds, General Student Services
- **Track Levels:** Review and confirm the assigned track levels for each position.

Action needed:

Using the information above, please complete the following action items:

- **Validate the level assignments to determine:**
 - If employees are appropriately aligned to Levels 1 through 4.
 - If employees are not appropriately aligned, please indicate an 'Adjusted Level Assignment' of 1, 2, 3, or 4 (pink column)



Sponsored Projects Administration: Jill Tincher & Cathy Cuppett

Wednesday, February 12, 2025



Decreasing Delays in Award Set-Up

Key Takeaways

1. [Suggestions](#)
2. Why do we have an issue?
3. What have we done to date?
4. What are the additional planned improvements?

Why do we have delays with award set-up?

- Exponential Growth in Sponsored Projects
 - 21.7% award dollar increase in 5 years and approximately 4800 mods/year
- Grants Portal plus Robust Financial Management System
 - Increased account codes, chart strings, fields, etc.

What have we done to date?

- In 2021:
 - Budget Templates (Simple, Detailed, and Fully-Burdened)
 - Productivity for Award Set Up and Productivity for Award Management
- In 2022:
 - Pending Award for 6 months and 50% of the funds
- In 2024:
 - Research Terms & Conditions Practitioner → Post Award (Minimal Risk)
 - Residual Balance → Post Award (System Validation = No Risk)
 - Chart strings, account code changes → Post Award (47% Mods)
 - Systematic Validation/Emails: Transmittal, Compliances and Budget
 - Grants Portal Budget Allocation OR Budget Template for new & mods



Decreasing Delays in Award Set-Up

Key Takeaways

1. [Suggestions](#)
2. Why do we have an issue?
3. What have we done to date?
4. What are the additional planned improvements?

What are the additional planned improvements?

- Analysis of account codes based upon risk levels
- Budget allocation and reallocations directly routing to Post Award to align with national standards and free up Pre-Award to focus on award/mod review, negotiation, and sponsor approval
- Peer Review Committee charged with assessing recommendations and opportunities
- Staffing Levels in Sponsored Projects Administration
 - Post Award is adding a person
 - Pre-Award is requesting additional personnel

Do you have suggestions? Let us know by submitting them [here](#)!!



Account Code Tool – group input

Key Takeaways

1. Share [this link](#) with members of your team to suggest additional that additional notes be added to this tool.
2. Why do we have an issue?
3. What have we done to date?
4. What are the additional planned improvements?

Suggested Edits to Account Code Search

Search by keyword

Showing 1-100 of 400

100 per page Page 1 of 4 < >

Account Code	Description	Long Description	Current Additional Notes	Suggested Additional Notes (click cell to edit)
522100	Salaries-Staff	Includes all salaries or wages for staff employees.	Includes salaries or wages for administrative and clerical staff.	
522200	Additional Straight Time	Includes additional salary paid on a straight-time basis.		
522805	Salaries-Staff-Overtime	Includes all overtime payments to staff employees.		
523100	Salaries-Graduate Assistants			
524100	Salaries-Student Assistants	Includes personal services for students employed by the institution. This account should not include expenditures for the College Work-Study Program.	This account does not include Graduate Assistants. Account 523100 is used for Graduate Assistants.	
525100	Salaries-Casual Labor	Includes all payments of salaries to casual labor employees. Includes payments for casual labor on special projects not included under regular salaries or per diem and fe... view more		
526101	Vacation Payout - Staff			
526110	Voluntary Separation Pay-Staff			
526150	Extra Pay - Staff			
526200	Supplemental Pay- Retirement			

A large, multi-tiered fountain with water spraying upwards is the central focus in the foreground. In the background, a large, white, three-story building with a central arched entrance and several dormer windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is clear and blue.

Budget Mgmt. & Planning System: John Graham

Wednesday, February 12, 2025



Budget Mgmt. & Planning System Data

Key Takeaways

1. Unit training is underway
2. Data in the system is live but will be refreshed in early March.

- Unit level In-Person Training began this week. We will be meeting with all units over the next several weeks as part of our change management process.
- If you have not signed your unit up for training, we still have spots available. Please contact the budget office to schedule your training.
- We are using the live production environment for our unit trainings. Because of this, we will be resetting the system in early March to provide a clean environment to campus for the BPSS process.
- You are welcome to use the system to practice and test scenarios for your units until that time, but please know that all data will be reset in March.
- We will communicate in advance the date of the system reset. Once the system is cleared, we will communicate to campus that they are free to begin inputting permanent data.

A large, multi-tiered fountain with water spraying upwards is the central focus in the foreground. In the background, a large, white, three-story building with a row of dormer windows is visible, surrounded by lush green trees and a well-maintained lawn. The sky is clear and blue.

Open Discussion

Wednesday, February 12, 2025

Next Meeting
**State Botanical
Garden: Porcelain
and Decorative
Arts Museum**
April 9 @3pm

View past meeting
materials on
the [BSAG website](#)

