

**FISCAL ADMINISTRATORS MEETING NOTES
WEDNESDAY, JANUARY 15, 2020, 10:00 AM
SOUTH MEETING ROOM, NEWCOMB HALL**

General Comments – John McHugh

- Cheryl Pleasants retired from PSDS in December

Finance Strategic Transformation – Brandi Van Ormer

- With 2019 we ended Phase 2: Readiness and we're heading into Phase 3: Implementation. Remember that Implementation isn't an immediate thing -- it's a long ramp-up and lots of collaboration between now and go-live in June of 2021.

Recap of Phase 2: Readiness

1. Phase 2 has been a time of intense work, together with our stakeholders and partners across Grounds.
One important happening is that The FST Steering committee voted in favor of expanding the Planning and Budgeting Pilot. Next, we'll need to decide which schools and business units will participate in the expanded pilot, and define a roll-out schedule
2. Additionally, a cross-functional working group has been working to refine the FST Design Principles, using feedback from the Advisory Committee and the Steering Committee. [You can view the design principles on the FST website.](#)
3. In Phase 2, we have sought to identify high-level change impacts through a variety of activities, including our Business Process Discovery sessions, the Chart of Accounts Straw Model, Workday HCM and Finance Integrations, and more. Some of you may have been involved in those workshops. These change impacts will help us confirm the scope and budget of the project, understand and communicate what is changing, inform our change management plans, and guide further analysis during Phase 3.

Phase 3: Implementation

- Phase 3 stretches from January 2020 through June of 2021, which gives us a long time to plan, architect, configure and prototype, and to test the system thoroughly.

[Visit the FST website for a more detailed look at the Phase 3 Timeline.](#)

- As we move into Phase 3, you will notice the project team getting larger as we add the expertise and bandwidth this phase will require.
- Recently added positions include Jackie Tucker as Workday Implementation Lead, Angela Knobloch as Change Management Lead, and Mary Wagamon is moving into the role of Communications Coordinator.
- There are several positions open currently, which you can view on the [Financetransformation.virginia.edu website](http://Financetransformation.virginia.edu) and in the [online community](#)
- Feel free to share these on your Linked In or within your circles.

- As we have dug into Phase 2 these past several months, it's been terrific to have the partnership of schools and units, with folks sharing their concerns, their ideas, and questions. We are truly looking forward to what Phase 3 will bring, and to that continued work and partnership.
- If you don't get the UVA Finance Blog digest, please give me a holler or visit the blog and sign up. There is always a roundup of FST news in there, including a link to our WFST Radio Broadcast – a podcast that goes out at the same time as the digest, with mostly the same info, but in a format where you can listen instead of read.

Human Resources – Lynn Russell

- Leave Process Review

<https://fro.vpfinance.virginia.edu/system/files/Leave%20overview%20Unum.pdf>

Introduce New Associate Vice Presidents – John McHugh

- Augie Maurelli – Associate Vice President for Financial Operations
- Bill Ashby – Associate Vice President for Financial Strategy

Procurement & Supplier Diversity Services

Shannon Wampler

- Website Update/Demo

Operational Reasons for Changes

- Align with the University's brand standard
- Anticipate changes in how users access our site
- Accessibility concerns
- IT resource changed in UVA Finance and PSDS
- Server migration and data concerns

Strategic Reasons for Changes

- Turnover in purchasing community
- Change in systems, procedures, and policies
- Attrition in PSDS
- Better information on the website to more effectively assist the community
- Great content, but it was flat (not drillable or well-organized)
 - Overwhelming to community
- Over or under-explained content
- It was unclear how to get help (too many email addresses)
- 596,921 unique page views in 2019
- Problem Invoice page on the website had a 91.82% bounce rate (i.e. needed information was not found)
- New website is function-focused, structured by basics (i.e. Purchasing Basics), organized functional resources, and commodity guides
- Getting help is now easier, with dedicated contact information for each team within Procurement
- There is now a link to the UVA Marketplace (there was not before)
- Big Decisions
 - Frequently Used Contracts page has been removed
 - Invoice Lookup for Departments is being transferred to UBI

- Email saw2w@virginia.edu if you would like to serve as a test user

Les Haughton

- Supplier Diversity Update

Small Women and Minority-Owned Businesses (SWAM) Supplier Day

- Today in Newcomb Hall (following Fiscal Administrator's Meeting)
- 15 suppliers (all SWAM certified)
- Please attend if possible

2006: Governor Kaine signed a bill setting a goal that 42% of Commonwealth goods and services come from SWAM certified vendors (not currently being achieved)

- UVA's goal is 39% (not currently being achieved)

Most purchases on the academic side are less than \$10,000 (relatively small)

Many SWAM vendors have lost their certification, and thus we cannot claim these dollars

<https://fro.vpfinance.virginia.edu/system/files/Supplier%20Diversity%202020%20Update%20FA%20mtg115.pptx>

The next meeting will be on Wednesday, February 19, 2020 at 10:00am in the South Meeting Room, Newcomb Hall.