

**FISCAL ADMINISTRATORS MEETING AGENDA****WEDNESDAY, FEBRUARY 21, 2018, 10:00 AM****SOUTH MEETING ROOM, NEWCOMB HALL*****General Comments – Eric Denby******Hoo's Well Spring Challenge***

Lace up your sneakers! The Hoo's Well Spring Fitness Challenge kicked off on Tuesday, January 16. All UVA employees and their spouses covered by the UVA Health Plan are eligible to earn \$200 each for completing 52 workouts between January 16 and April 27, 2018. A workout is 30+ minutes or 7,000+ steps. Visit [www.hooswell.com](http://www.hooswell.com) for more details and to register or start logging your activity on the ActiveHealth portal.

Check out the [Hoo's Well Schedule](#) for a list of FREE fitness activities and other great resources to help get you moving.

***Finance Outreach & Compliance*****Patty Marbury**

- Introduction of Jeff Schiz from Association for Finance Professionals (AFP) to present information on the [Certification Program](#).
- New Lynda.com Playlists – see website <http://foc.virginia.edu/lyndacom-playlists>

**Danielle Hancock**

- Fixed Assets – When should I choose Equipment Capital, Equipment Non-Capital? An expenditure type review, see [presentation](#).

***Managerial Reporting Project – Judy DiVita***

- Discoverer Sunset Actions – see [presentation](#).

***Procurement and Supplier Diversity Services***

- Travel & Expense Updates - **Carrie McGowan**

Procurement and Supplier Diversity Services, on the advice of Property & Liability Risk Management and University Counsel, can no longer allow transactions to home rental services, such as **AirBnB**, **VRBO**, or **HomeAway**, to be paid on the Travel and Expense Card. The decision was made based on concern that little is known about each location and whether it meets motel/hotel industry standards for safety and security and no assurance that the host has adequate liability insurance in the event travelers are injured during their stay. However, travelers may still choose to pay for home rental services with their personal funds

and seek reimbursement after the trip although not recommended for reasons stated above. Any transactions made after 2/23/2018, cannot be paid with a T&E Card. To review an updated list of Restricted Items please click [here](#).

- Second Annual Travel & Expense Expo – Tuesday, March 27, 10am-2:00pm, Newcomb Hall Ball Room. Look for email invitation send out on February 26, 2018.

### **John McHugh**

- **Renovation update End of March**
- **Transportation Services**

Strategic project with Virginia Higher Educations Collaborative (VHEPC) in support of our travel program. Awarded 20 contracts; 17 firms are SWAM certified. Some of the benefits include

- Minimized or in most cases eliminated fee increases
- Negotiate one-way airport transportation fees
- Favorable cancelation terms
- Favorable fuel surcharged
- No deposits should be required
- No separate contract / agreement with T&Cs requiring signature. A simple order confirmation document should be used
- Insurance requirements have been raised and leveled across all firms

Contracts can be found on our website

<http://www.procurement.virginia.edu/pagecontracts&category=Travel#Transportation Services>

- **Research and Development RFP**

Generation 3 issued in January

Open through end of May

Coincides with ETF Schedule

Using ETF purchases to push vendors to respond

Share the public posting link below with vendors when requesting a quote for large research equipment

[http://www.procurement.virginia.edu/main/publicpostings/rfp/ADD\\_004\\_KF042916\\_GEN%202003\\_Research%20and%20Development%20Goods%20and%20Services.pdf](http://www.procurement.virginia.edu/main/publicpostings/rfp/ADD_004_KF042916_GEN%202003_Research%20and%20Development%20Goods%20and%20Services.pdf)

- **1099's**

Completed and issued on January 31<sup>st</sup>.

Handled as a project

Having a recap meeting this Friday

Let me know [jm7v@virginia.edu](mailto:jm7v@virginia.edu) if you have an experience you want to share

Seeing some reimbursements to individuals not clearly described as reimbursement with service expenditure type

Please include reimbursement in description so we can determine if a 1099 is needed

- **SWaM Day Expo** – Save the date

Tuesday July 3 this year (day before holiday)

Newcomb Hall Ballroom, 1-4pm

*Office of Organizational Excellence – Lee Baszczewski & Stan Gunn*

- University Project Portfolio and Quality Core Session – March 20

Portfolio Roundtable [PDF](#).

**The next meeting is scheduled for Wednesday, March 21, 2018 at 10:00am in the South Meeting Room, Newcomb Hall.**

E-mail comments to: [Comptroller@Virginia.edu](mailto:Comptroller@Virginia.edu)

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