

MAXIMUS

MAXIMUS 32nd Annual Higher Education Meeting
September 11 – 14, 2019
Gaylord Opryland Resort & Convention Center – Nashville, TN

AGENDA

Wednesday, September 11th

5:00-8:00 P.M.

Welcome Reception – hosted by HCA Asset Management

Reunite with your colleagues and friends while enjoying the music of [Dustin Olson & his band](#). Drinks and heavy hors d'oeuvres will be served.

Thursday, September 12th

7:30 - 8:30 A.M.

Continental Breakfast

8:30 - 9:00 A.M.

Welcome & Introduction

9:00 - 9:45 A.M.

Keynote Speaker – Dr. Doug Adams, Daniel F. Flowers Professor, Distinguished Professor and Chair, Department of Civil and Environmental Engineering; Professor of Mechanical Engineering, Vanderbilt University



Dr. Adams is the Daniel F. Flowers Professor of Engineering, Distinguished Professor and Chair of Civil and Environmental Engineering and Professor of Mechanical Engineering at Vanderbilt University. His research has developed new structural health monitoring methodologies that incorporate novel sensing and system identification techniques. This work is enabling intelligent infrastructure systems of the future that are self-aware in energy, security, and manufacturing applications. For instance, he serves as the Nondestructive Evaluation Technical Fellow for the \$259M US Department of Energy Composites Institute focused on next-generation materials in partnership with 150 industry members. He has written 93 refereed journal articles and 176 conference papers, and authored a textbook on structural health monitoring as well as 5 book chapters on topics ranging from health monitoring of wind turbines to damage prognosis of aircraft materials. He has been recognized with 25 awards including the Presidential Early Career Award, the Society for Experimental Mechanics DeMichele and Lazan Awards, and he was elected Fellow of the American Society of Mechanical Engineers. He has supervised 56 graduate student researchers, advised 57 undergraduate researchers, and currently advises 2 Ph.D. students. He teaches courses in mechanics and dynamic systems, has won awards for classroom and online teaching along with being elected to the Purdue Book of Great Teachers, and has disseminated his research worldwide in more than 100 seminars and 30 short courses. Dr. Adams has secured 9 patents and over 130 contracts and grants for ~\$35M in funding.

9:45 - 10:15 A.M.

Break

10:15 - 11:30 A.M.

Concurrent Sessions

Please Note: There will be concurrent sessions on Thursday, Friday, and Saturday. For a detailed description of each session, see the attachment to this agenda.

Session Offerings:

- 1.1 Mid-Atlantic Regional HHS Roundtable
- 1.2 Northeast Regional HHS Roundtable
- 1.3 Central Regional HHS Roundtable
- 1.4 Western Regional HHS Roundtable
- 1.5 ONR Roundtable
- 1.6 CRIS Lab – Fundamentals of CRIS
- 1.7 CRIS Lab – Open Lab
- 1.8 Audit Compliance for Effort Reporting

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11:30 - 1:00 P.M. ***Lunch at the Hotel, hosted by MAXIMUS***

1:00 - 2:15 P.M. ***Concurrent Sessions***

Session Offerings:

- 2.1 Introduction to F&A
- 2.2 Fringe Benefit Rates - Panel
- 2.3 Space Surveys - The University Perspective
- 2.4 How to Use your Previous CRIS Model for your New Base Year
- 2.5 CRIS Lab - Reporting in CRIS
- 2.6 Alternative Methods: To Certify or Not

2:15-2:45 P.M. ***Break***

2:45 - 4:00 P.M. ***Concurrent Sessions***

Session Offerings:

- 3.1 Don't Forget about the Administrative Component
- 3.2 Optimizing the Depreciation Components: Allocations/Challenges/Best Practices
- 3.3 WebSpace Forum
- 3.4 Allocations & Statistics - Part 1: Overview & CRIS Defined Stats
- 3.5 Foreign Influence – The Broad & Complex Perspectives from the FBI, Congress & More and How they are Impacting Your University
- 3.6 CRIS Lab - Space Processing and Analytics

6:00 P.M. ***Group Dinners at Various Restaurants***

Friday, September 13th

7:30 - 8:15 A.M. ***Continental Breakfast***

8:15 - 9:25 A.M. **General Session:** Expert Costing Panel Presentation. Select contributors to COGR's recent white paper: *Excellence in Research: The Funding Model, F&A Reimbursement, and Why the System Works*, provide their insights and perspectives

Facilitator: Jim Luther, Associate Vice President, Research Costing Compliance & Federal Reimbursement, Duke University

Panelists: Cathy Snyder, Director, Grant and Contract Accounting, Vanderbilt University; Jeff Silber, Sr. Director, Sponsored Financial Services, Cornell University; Kimberly Croft, Senior Director, Research Administration, Penn State University; and Mike Legrand, Director of Costing Policy & Analysis, University of California Davis

9:25 - 9:45 A.M. ***Break***

9:45 - 10:55 A.M. ***Concurrent Sessions***

Session Offerings:

- 4.1 Allocations & Statistics - Part 2: User Defined Stats
- 4.2 What Management Needs to Know about F&A Rates & Recovery

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- 4.3 Selected Federal Reports & their Use in Diagnostics of the F&A Proposal
- 4.4 WebSpace Demo
- 4.5 Responding to Federal Data Request/Negotiation Questions - CAS
- 4.6 CRIS Lab - Advanced Tools
- 4.7 The False Claims Act – How the Department of Justice Pursues Universities for Alleged F&A Violations and Other Research Misconduct

10:55 - 11:10 A.M.

Break

11:10 – 12:20 P.M.

Concurrent Sessions

Session Offerings:

- 5.1 Final F&A Proposal Submission and Review
- 5.2 Rate Setting for Service Centers
- 5.3 Space Analysis and Review
- 5.4 The Effect of Accounting/Finance/Budget on F&A
- 5.5 CRIS Lab - Allocations
- 5.6 CRIS Lab - Open Lab
- 5.7 MAXIMUS Effort Reporting System (ERS) Demo

12:20 P.M.

Lunch & Afternoon (on your own)

Saturday, September 14th

7:30 - 8:30 A.M.

Continental Breakfast

8:30 - 9:45 A.M.

Concurrent Sessions

Session Offerings:

- 6.1 O&M Advanced Topics - Including UCA
- 6.2 Rate Extensions and Facilities Cost Projections
- 6.3 Keeping the F&A Rate Development Process on Track
- 6.4 Effective Use of WebSpace on Campus
- 6.5 Allocations & Statistics Part 3 - Troubleshooting Allocations
- 6.6 CRIS Lab - Importing of Data

9:45 - 10:15 A.M.

Break

10:15 - 11:30 A.M.

Concurrent Sessions

Session Offerings:

- 7.1 Selected Federal Reports & their Use in Diagnostics of the F&A Proposal
- 7.2 What You Should Know from the BPM
- 7.3 Using FTEs for the Space Survey
- 7.4 Responding to Federal Data Request/Negotiation Questions - DCAA/ONR
- 7.5 Accounting for Service Centers
- 7.6 CRIS Lab - Analytics using Trend

The MAXIMUS 32nd Annual Higher Education Meeting concludes at 11:30 AM on Saturday, September 14, 2019

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CONCURRENT SESSION DESCRIPTIONS

Thursday, September 12th
10:15 - 11:30 A.M.

Regional Negotiation Roundtables (1.1, 1.2, 1.3, 1.4, 1.5)

We will offer sessions for each of the HHS Regions, and ONR. These discussions will cover the results of the past year negotiations and the personalities, approaches and preferences of each region/agency.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Various

CRIS Lab – Fundamentals of CRIS (1.6)

In this session, users will experience CRIS hands-on using the CRIS University data model. This session will be a structured, step-by-step introduction led by an instructor, with additional time at the end of the session for questions. This lab session will cover the fundamentals of CRIS operations, including navigations, working with data, creating and reviewing rules, importing and exporting data.

Course Level: Beginner
Track: CRIS
Course Method: Hands-on Lab
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Inna Gvozdeva, Director, MAXIMUS

CRIS Lab – Open Lab (1.7)

Open Lab is the opportunity for users to “play” with the latest version of CRIS, ask questions about any of the features, upcoming releases and provide recommendations for future enhancements. Users may also bring in their own models, or files, to discuss a particular issue.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Pre requisite: None
CPE Credit: 1.0
Speakers: Sonika Wadhawan, Applications Manager, MAXIMUS and Rajesh Kumar, Systems Architect, MAXIMUS

Audit Compliance for Effort Reporting (1.8)

This session will focus on audit results and issues related to effort reporting.

Course Level: ERS
Track: Effort
Course Method: Presentation & Discussion
Course Pre requisite: ERS Client
CPE Credit: 1.0
Speaker: Doyle Smith, Consultant, MAXIMUS and Jason Guilbeault, Director, Post Award Services, Augusta University

Thursday, September 12th
1:00 - 2:15 P.M.

Introduction to F&A (2.1)

This course is intended for the individual with little to no knowledge of 2CFR Part 200. The course is a brief overview of these cost principles and the F&A process. It will cover the cost principles, direct and F&A costs, the F&A rate calculation, the F&A proposal, cost pools and the organized research direct cost base. We suggest you read through Subpart E and Appendix III of 2 CFR Part 200 and bring your questions to this session.

Course Level: Beginner
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Manager, MAXIMUS, and Shelly Benson, Senior Director, University Government Costing, University of Illinois Urbana

Fringe Benefit Rates - Panel (2.2)

This session will include a panel of presenters who will discuss topics related to Fringe Benefit Rates.

Course Level: All
Track: Costing
Course Method: Presentation & Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Jim Childers, Consultant, MAXIMUS, Cheresa Boston, Director, Sponsored Research, University of North Florida, and Janet Ianni, Director, Business Operations, University of Denver

Space Surveys - The University Perspective (2.3)

The space survey is one of the most important supporting activities associated with preparing the F&A rate proposal. Space is used to allocate bond debt interest, building and equipment depreciation, and operations and maintenance cost pools. These are part of the uncapped facilities component and are scrutinized by the federal government from both an allowable cost and allocation standpoint. An institution must approach the

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space survey with careful planning and coordination. The survey process should include facilities management space planning, academic departments that will be surveyed, office of sponsored programs and payroll. Mandatory training sessions should be conducted for those people performing the space functional survey.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Chuck Wuensch, Senior Manager, MAXIMUS, Jim Romportl, Financial Analyst, University of Minnesota, and Jaime Bunner, Director of Sponsored Projects, West Virginia University

How to Use your Previous CRIS Model for your New Base Year (2.4)

If you are still using and updating a CRIS model that was originally created many rate cycles ago, this is the session for you! We'll go over the benefits of starting with a new model, discuss tips on what to bring over from your previous model and discuss how to streamline your F&A Proposal process.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0
Speakers: Anne Feuerborn, Director, MAXIMUS and Janusz Stepien, Manager, MAXIMUS

CRIS Lab – Reporting in CRIS (2.5)

In this session, users will experience CRIS hands-on using the CRIS University data model. This session will be a structured step-by-step introduction led by an instructor and will focus on reporting topics, including standard, federal and custom reports as well as report batch process.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0
Speakers: Inna Gvozdeva, Director, MAXIMUS

Alternative Methods: To Certify or Not (2.6)

An updated look at the pros/cons of the alternatives.

Course Level: ERS
Track: Effort
Course Method: Presentation
Course Prerequisites: ERS Client
CPE Credit: 1.0

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Speakers: Doyle Smith, Director, MAXIMUS, Jason Guilbeault, Director, Post Award Services, Augusta University and David Hagen, Director of Cost Analysis, University of Minnesota

Thursday, September 12, 2019
2:45 – 4:00 P.M.

Don't Forget about the Administrative Component (3.1)

As institutional budgets get tighter you may be finding that you are no longer comfortably over the 26% administrative cap. This session will include topics related to maximizing the General Administration, Departmental Administration, and Sponsored Projects Administration components.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Janusz Stepien, Manager, MAXIMUS, Jaime Bunner, Director of Sponsored Projects, West Virginia University and Jim Nolan, VP, Federal Costing Concepts

Optimizing the Depreciation Components: Allocations/Challenges/Best Practices (3.2)

We will discuss depreciation allocation methods and how institutions can utilize best practices to mitigate risk and optimize recovery. Topics will also include compliance, common issues and challenges, and opportunities to maximize the building and equipment depreciation components. Audience will be asked to discuss their own practices for peer review.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Steve Bradley, Consultant, MAXIMUS and Greg Sheahan, HCA Asset Management

Allocations & Statistics - Part 1: Overview & CRIS Defined Stats (3.4)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics. We will give an overview of the allocation table and how it is linked to the statistics. This session show examples for creating allocations and statistics using CRIS-defined statistics.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Senior Manager, MAXIMUS

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Foreign Influence – The Broad & Complex Perspectives from the FBI, Congress & More and How they are Impacting Your University (3.5)

Since August 2018 when NIH sent letters to 10,000 faculty, there has been growing interest in faculty relationships and affiliations with collaborators around the world. The FBI, many members of Congress and the news cycle have fueled a climate of suspicion and universities are begging for clarity. Agencies are communicating guidance and universities are trying to interpret to better understand how it will change collaborative faculty behavior, internal university processes related to reporting of Other Support and management of activities that occur outside of the university. OIG Audits and other investigations are underway and growing in frequency. Recent headlines include: “Scientists with ties to China ousted from US cancer center amid fears of foreign influence”, “China hides identities of top scientific recruits amidst growing US scrutiny”, “US intelligence warns China is using student spies to steal secrets, etc.” It is important to note that this spreads far beyond China and all sponsors are evaluating controls around appropriate disclosure and management of intellectual property.

Course Level: All
Track: Costing
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0
Speakers: Jim Luther, AVP Finance & Sponsor Liaison, and Compliance Officer, Duke University

CRIS Lab - Space Processing and Analytics (3.6)

In this session, users will experience CRIS hands-on using the CRIS University data model. This session focus on will space processing and analytics in CRIS.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Pre requisite: None
CPE Credit: 1.0
Speaker: Anne Feuerborn, Director, MAXIMUS

Friday, September 13th
9:45 – 10:55 A.M.

Allocations & Statistics - Part 2: User Defined Stats (4.1)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics and is a companion to Part 1 of 2. This session will have examples for creating allocations and statistics for User-defined statistics.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0

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Speakers: Caroline Beeman, Director, MAXIMUS and Jaime Bunner, Director of Sponsored Projects, West Virginia University

What Management Needs to Know about F&A Rates & Recovery (4.2)

This session is intended for all persons involved in the F&A process, as communicating to and working with senior management is one of the key elements of a successful F&A proposal submission. We will break the submission and negotiation process into different parts, providing participants with common sense and practical strategies for both managing your project, and expectations at the senior manager level. We'll address important questions like: "What were the known issues from the last F&A cycle and how do we address those now before the next F&A cycle turns hot?" And, "When is the right time to provide management with final draft results, and, how do we present the results?" We will touch on techniques you can use to inform senior management about the basics of F&A. Finally, we will discuss different strategies for managing expectations for the final negotiated F&A rates.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Chuck Wuensch, Senior Manager, MAXIMUS, Jill Mortali, Director of Sponsored Projects, Dartmouth College, David Schultz, AVP, Research Administration, Rensselaer Polytechnic Institute and Mike Legrand, Director of Costing Policy & Analysis, University of California Davis

Selected Federal Reports & their Use in Diagnostics of the F&A Proposal (4.3)

This session will showcase how to use selected Federal Reports as a diagnostic tool for the F&A Proposal.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Senior Manager, MAXIMUS and Brenda Harrell, Assistant Controller, University of Florida

WebSpace Demo (4.4)

In this session, we will provide an in-depth demonstration of WebSpace and how it can be used at different campuses for inventory and survey as well as analysis.

Course Level: All
Track: WebSpace
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0

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Speaker: Inna Gvozdeva, Director, MAXIMUS, and Pai Siwamutita, Sr. Application Developer, MAXIMUS

Responding to Federal Data Request/Negotiation Questions - CAS (4.5)

This session will provide an overview of the negotiation process with Cost Allocation Services (CAS), items to consider before the negotiation, a review of issues that have come up in recent negotiations, as well as issues that recur in negotiations of the F&A rates. In addition, we will discuss how to utilize CRIS to respond to questions that arise during the review/negotiation with CAS.

Course Level: All
Track: Costing
Course Method: Presentation & Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Janusz Stepien, Manager, MAXIMUS, Steve Bradley, Consultant, MAXIMUS and Jim Nolan, VP, Federal Costing Concepts

CRIS Lab - Advanced Tools (4.6)

In this session, users will experience CRIS hands-on using the CRIS University data model. This lab will showcase the underutilized features and advanced tools in CRIS.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0
Speakers: Anne Feuerborn, Director, MAXIMUS and Deb Carmel, Consultant, MAXIMUS

The False Claims Act – How the Department of Justice Pursues Universities for Alleged F&A Violations and Other Research Misconduct (4.7)

The Department of Justice (DOJ) recovers several billion dollars each year through its enforcement of the False Claims Act. Universities receiving federal funds are often targeted by these actions. In 2016, Columbia University a northeast university paid \$9.5 million and admitted to using its on-campus F&A rate, instead of its lower off-campus F&A rate, for certain NIH-sponsored research performed at facilities owned by New York the State and New York City. This year, Duke University a Mid-Atlantic university paid \$112.5 million for alleged fraud in research sponsored by NIH and EPA. Other recent university cases have included alleged violations of time and effort requirements, cost allocations, and cost principles. This session will provide insight into what the False Claims Act is, how it can be violated, how it works in practice, what protections are provided to whistleblowers, and what steps you can take to mitigate and reduce your False Claims Act risk.

Course Level: All
Track: Costing/Effort
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0

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Speaker: Derek Adams, Partner, Feldesman, Tucker, Leifer & Fidell

Friday, September 13th
11:10 A.M. – 12:20 P.M.

Final F&A Proposal Submission and Review (5.1)

In this session we will explain the diagnostic review step used by MAXIMUS. The diagnostic tests include data consistency tests using CRIS reports to identify "red flags" and ensure all proposal components have been included.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Manager, MAXIMUS and Steve Bradley, Consultant, MAXIMUS

Rate Setting for Service Centers (5.2)

This session will focus on rate setting for Service Centers. Careful attention should be paid to the rate development process because it is imperative that Service Centers billing rates recover the direct operating costs of providing the services on an annual basis. In this session, we will work through several example templates in detail that ensure that the computation of the cost-based rates include all of the typical components such as salaries, wages, benefits, materials & supplies, and surplus/deficit. Attendees should come away with the necessary tools to properly prepare service center rates that will comply with the requirements of the Uniform Guidance.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Jim Childers, Consultant, MAXIMUS, David Schultz, AVP, Research Administration, Rensselaer Polytechnic Institute and Alicja Nalewajek, Financial Analyst, University of Pennsylvania

Space Analysis and Review (5.3)

In this session, we will use CRIS reports in a hands-on exercise to identify issues that may be questionable to the government. The majority of the errors appearing during the full system run are space related. We will discuss the multiple methods to identify the problems and clean the errors. We will demonstrate some of the issues that may come up during a space walkthrough.

Course Level: All
Track: Costing/CRIS
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0

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Speakers: Caroline Beeman, Director, MAXIMUS, Chuck Wuensch, Senior Manager, MAXIMUS and Jaime Bunner, Director of Sponsored Projects, West Virginia University

The Effect of Accounting/Finance/Budget on F&A (5.4)

What is the role of the Accounting, Finance and Budget staff in the F&A process? This session will discuss the role each plays in obtaining the data for the F&A proposal and what accounting systems and staff need to be included. In addition, we will cover what types of information and data you should share with these shareholders after the F&A proposal is completed. In particular, how much of an overview of the F&A rate and how it is calculated is appropriate to share with each of these stakeholders. We will cover the pros and cons of different types and levels of data. Please feel free to bring experiences from your institution to share!

Course Level: All
Track: Costing
Course Method: Presentation & Discussion
Course Pre requisite: None
CPE Credit: 1.0
Speakers: Doyle Smith, Consultant, MAXIMUS, Janet Ianni, Director, Business Operations, University of Denver and Cheresa Boston, Director, Sponsored Research, University of North Florida

CRIS Lab - Allocations (5.5)

In this session, users will experience CRIS hands-on using the CRIS University data model. We will look at identifying and cleaning up stepdown issues, as well as verifying the allocation results. This session will be a structured step-by-step introduction led by an instructor.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Pre requisite: Familiarity with CRIS
CPE Credit: 1.0
Speakers: Inna Gvozdeva, Director, MAXIMUS

CRIS Lab – Open Lab (5.6)

Open Lab is the opportunity for users to “play” with the latest version of CRIS, ask questions about any of the features, upcoming releases and provide recommendations for future enhancements. Users may also bring in their own models, or files, to discuss a particular issue.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Pre requisite: None
CPE Credit: 1.0
Speakers: Anne Feuerborn, Director, MAXIMUS

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MAXIMUS Effort Reporting System Demo (5.7)

A high level presentation of the MAXIMUS Effort Reporting System (ERS) will be offered as a web based solution to comply with the Uniform Guidance assist institutions in complying with the Uniform Guidance 2 CFR 200.430 for Personal Compensation.

Course Level: All
Track: Effort
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0
Speaker: Joe Prokop, Sr. Applications Manager, MAXIMUS and Jing Chen, Consultant, MAXIMUS

Saturday, September 14th

8:30 – 9:45 A.M.

O&M Advanced Topics - Including UCA (6.1)

This session will focus on advanced topics related to O&M, including the UCA. We will discuss possible O&M sub-pools and the considerations to keep in mind regarding the allocation base and the allocation statistics, including the federal government perspective. We will examine various factors that influence the UCA and the impact or magnitude of the UCA.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Chuck Wuensch, Senior Manager, MAXIMUS

Rate Extensions and Facilities Cost Projections (6.2)

When does it make sense to request a rate extension and when does it not make sense? What factors should you consider in making this decision? How many years should you request? What is the process for requesting a rate extension? These are the questions that will be answered in this session, as well as a discussion about facilities cost projections.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Manager, MAXIMUS

Keeping the F&A Rate Development Process on Track (6.3)

This session will review ideas to organize and manage the many tasks that are a part of the F&A Proposal process. The presentation will be broken down into project phases and specific examples will be provided. Please feel free to bring in your own process to discuss.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Anne Feuerborn, Director, MAXIMUS, Maureen Johnson, Associate Director, University of Illinois Chicago, and Ty Stephens, Director of Cost Accounting, University of Arkansas Medical Sciences

Effective Use of WebSpace on Campus (6.4)

In this session, we will discuss how to use WebSpace to effectively and efficiently inventory and survey the space, as well as meeting specific university objectives.

Course Level: All
Track: WebSpace
Course Method: Presentation & Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Inna Gvozdeva, Director, MAXIMUS and Jim Romportl, Financial Analyst, University of Minnesota

Allocations & Statistics Part 3 - Troubleshooting Allocations (6.5)

This course is designed for the CRIS user who would like to gain an understanding of the allocation process and the associated statistics and is a companion to Part 1 and 2. This session will have examples for troubleshooting allocations and statistics.

Course Level: Beg
Track: CRIS
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Caroline Beeman, Director, MAXIMUS

CRIS Lab - Importing of Data (6.6)

In this session, users will experience CRIS hands-on using the CRIS University data model. This lab will showcase the newest features for importing data into CRIS, including appending records, updating records, and performing a file analysis before importing data.

Course Level: All

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Track: CRIS
Course Method: Hands-on Lab
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0
Speakers: Deb Carmel, Consultant, MAXIMUS

Saturday, September 14th
10:15 – 11:30 A.M.

Selected Federal Reports & their Use in Diagnostics of the F&A Proposal (7.1)

This session will showcase how to use selected Federal Reports as a diagnostic tool for the F&A Proposal.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Senior Manager, MAXIMUS and Brenda Harrell, Assistant Controller, University of Florida

What's New in the BPM? (7.2)

This is focused on the major revisions to the “Best Practices Manual” (BPM), issued during January 2017, by the Department of Health & Human Services (HHS), Cost Allocation Services (CAS). An understanding of the BPM is vital since it serves as a guide for Facilities & Administrative (F&A) Rate Proposals submitted by colleges and universities, as well as rate negotiations and data requests. This session will focus on the following: new section on the Utility Cost Adjustment (UCA), new section for F&A Proposal Extension Requests under the “Uniform Guidance,” significant changes to other BPM sections, and the MAXIMUS Impact Assessment for these revisions, including CRIS.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Chuck Wuensch, Senior Manager, MAXIMUS

Using FTEs for the Space Survey (7.3)

This session will discuss using FTEs for a space survey.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0

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Speakers: Anne Feuerborn, Director, MAXIMUS, and Shelly Benson, Senior Director, University Government Costing, University of Illinois Urbana

Responding to Federal Data Request/Negotiation Questions – DCAA/ONR (7.4)

This session will provide an overview of the negotiation process with Defense Contract Audit Agency (DCAA) and the Office of Naval Research (ONR), items to consider before the negotiation, a review of issues that have come up in recent negotiations, as well as issues that recur in negotiations of the F&A rates. In addition, we will discuss how to utilize CRIS to respond to questions that arise during the review/negotiation with ONR.

Course Level: All
Track: Costing
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0
Speaker: Jim Childers, Consultant, MAXIMUS, Jennifer Rowles, Cost Analysis Manager, Penn State University and Tiffany Melendez, Cost Analyst, Massachusetts Institute of Technology

Accounting for Service Centers (7.5)

During this intermediate/advanced level webinar we will delve into some of the accounting concepts and practices surrounding service (recharge) centers. Topics covered will include accounting for subsidies, external users, depreciation, and reserves. Why would I want more than one project/cost center to account for a service center?

Course Level: All
Track: Costing
Course Method: Presentation
Course Pre requisite: None
CPE Credit: 1.0
Speaker: Caroline Beeman, Director, MAXIMUS and Cathy Snyder, Director, Contract & Grant Accounting, Vanderbilt University

CRIS Lab - Analytics using Trend (7.6)

In this session, users will experience CRIS.Net hands-on using the CRIS University data model. This session will cover the use of Trend feature and how it can be used to conduct various analyses.

Course Level: All
Track: CRIS
Course Method: Hands-on Lab
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0
Speakers: Inna Gvozdeva, Director, MAXIMUS and Deb Carmel, Consultant, MAXIMUS