

maximus

36th Annual
Higher Education Hybrid Meeting
September 20 - 23, 2023



ONSITE AGENDA

(All times are listed in Central Time)

Wednesday, September 20th, 2023

5:00 PM - 8:00 PM

Welcome Reception & Dinner in the Interior Courtyard

Reunite with your colleagues and friends while enjoying the music of John Arthur Martinez. Drinks, hors d'oeuvres & dinner will be served.

Thursday, September 21st, 2023

7:00 AM - 8:30 AM

Continental Breakfast in the Tejas Conference Dining Room

8:30 AM – 9:00 AM

Welcome & Introduction by Harold Horton, Senior Vice President, Maximus

9:00 AM – 10:15 AM

1.1 - General Session, Keynote Presentation - Building the Future: Tissue Engineering Unleashed - From Engineered heart muscle to cell-based meat

Presented by: Dr. Janet Zoldan, PhD

Dr. Zoldan earned her BSc degree in Chemistry from the Hebrew University in Jerusalem, and pursued her Master's degree and Doctorate in the Department of Materials Engineering at the Technion-Israel Institute of Technology, specializing in polymer science. Following her doctoral studies, she completed her postdoctoral training at the Massachusetts Institute of Technology, where she joined Dr. Robert Langer's lab. Her work in the Langer lab focused on delivering nucleic acids to human embryonic stem cells and microfluidic delivery of proteins. In 2013, Dr. Zoldan joined The University of Texas at Austin as an Assistant Professor. Her lab's research centers around the use of human induced pluripotent stem cells to investigate the fundamental principles involved in cardiovascular tissue formation processes and regenerating ischemic tissue. Dr. Zoldan has received several prestigious awards for her research, including the Scientist Development Grant from the American Heart Association, the Alliance of Regenerative Rehabilitation Research and Training grant, and being named a 2017 Emerging Investigator by the Journal of Biomaterials Science. Recently, she became an NIH Trailblazer awardee, recognizing her as an early-stage investigator with the potential to open new areas of biomedical investigation. In 2020, Dr. Zoldan was promoted to Associate Professor and now holds the Endowed William J. Murray, Jr. Fellowship in Engineering No. 3.



10:15 – 10:45 AM

Break

10:45 – 12:00 PM

Concurrent Sessions

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

Session Offerings:

- 2.1 Mid-Atlantic Regional HHS Roundtable
- 2.2 Northeast Regional HHS Roundtable
- 2.3 Central Regional HHS Roundtable
- 2.4 Western Regional HHS Roundtable
- 2.5 ONR Roundtable
- 2.6 CRIS Lab – Open Lab

12:00 PM – 1:30 PM

Lunch in the Tejas Conference Dining Room

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1:30 PM – 2:45 PM

Concurrent Sessions

Session Offerings:

- 3.1 Allocations & Statistics - Part 1: Overview & CRIS Defined Stats
- 3.2 Responding to Federal Data Request/Negotiation Questions - HHS-CAS
- 3.3 Responding to Federal Data Request/Negotiation Questions - ONR
- 3.4 CRIS Lab - Fundamentals of CRIS

2:45 PM – 3:15 PM

Break

3:15 PM – 4:30 PM

Concurrent Sessions

Session Offerings:

- 4.1 The Importance of Asset Management: A Case Study
- 4.2 Planning and Managing the F&A Process
- 4.3 WebSpace Forum
- 4.4 CRIS Lab - Importing of Data

5:30 PM

Dinner - Meet at the AT&T Hotel's Whitis Ave. Entrance for Transportation to various restaurants around Austin

Friday, September 22nd, 2023

7:30 AM - 8:30 AM

Continental Breakfast in the Tejas Conference Dining Room

8:30 AM – 9:45 AM

Concurrent Sessions

Session Offerings:

- 5.1 Allocations & Statistics - Part 2: User Defined Stats
- 5.2 Space Surveys - The University Perspective
- 5.3 What Management Needs to Know about F&A
- 5.4 CRIS Lab - Reporting in CRIS

9:45 AM – 10:15 AM

Break

10:15 – 11:30 AM

Concurrent Sessions

Session Offerings:

- 6.1 Allocations & Statistics Part 3 - Troubleshooting Allocations
- 6.2 The False Claims Act and OIG Audit Findings
- 6.3 Fringe Benefit Rates - Panel
- 6.4 CRIS Lab - Space Processing and Analytics

11:30 PM – 1:00 PM

Lunch in the Tejas Conference Dining Room

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Saturday, September 23rd, 2023

7:30 AM - 8:30 AM ***Continental Breakfast in the Tejas Conference Dining Room***

8:30 AM – 9:45 AM ***Concurrent Sessions***

Session Offerings:

- 7.1 Service Center Topics
- 7.2 How WebSpace Can Help
- 7.3 Rate Extensions and Facilities Cost Projections
- 7.4 CRIS Lab - Useful Tools and Helpful Hints

9:45 AM – 10:15 AM ***Break***

10:15 AM – 11:30 AM ***Concurrent Sessions***

Session Offerings:

- 8.1 Discussion Group: Fringe Benefits - Panel
- 8.2 Discussion Group: Service Center Topics
- 8.3 Optimizing the Operations & Maintenance Component
- 8.4 CRIS Lab - Allocations

11:30 AM – 1:00 PM ***Lunch – Box Lunches***

**The Maximus 36th Annual Higher Education Onsite Meeting concludes at 1:00 PM
on Saturday, September 23rd, 2023**



CONCURRENT SESSION DESCRIPTIONS

Thursday, September 21st, 2023
10:45 AM – 12:00 PM

Regional Negotiation Roundtables (2.1, 2.2, 2.3, 2.4, 2.5)

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 – Open Lab (2.6)

Open Lab is the opportunity for users to ask questions about any of the features, upcoming releases and provide recommendations for future enhancements. Users may also bring up questions concerning their own models, or files, to discuss a particular issue.

Course Level: All
Track: CRIS
Course Method: Hands-On Lab
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Inna Gvozdeva, Director, Maximus

Thursday, September 21st, 2023
1:30 PM – 2:45 PM

Allocations & Statistics - Part 1: Overview & CRIS Defined Stats (3.1)

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: Inna Gvozdeva, Director, Maximus and Mitzi Singleton, Sr. Manager, Maximus



Responding to Federal Data Request/Negotiation Questions - HHS-CAS (3.2)

This session will provide an overview of the negotiation process with the HHS-CAS cognizant agency, 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.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Caroline Beeman, Director, Maximus; Mike Meunier, Sr. Consultant, Maximus; and Jim Nolan, Vice President, Federal Costing Concepts, LLC

Responding to Federal Data Request/Negotiation Questions - ONR (3.3)

This session will provide an overview of the negotiation process with the ONR cognizant agency, 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.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Mira Levine, Sr. Manager, Maximus; Jen Rowles, Manager, Maximus; Jim Childers, Sr. Consultant, Maximus; and Jonathon Jeffries, Director of Cost Accounting, Georgia Tech

CRIS Lab - Fundamentals of CRIS (3.4)

This session will be a structured, step-by-step demonstration by an instructor. This lab session will cover the fundamentals of CRIS operations, including navigation, 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
Speaker: Chuck Wuensch, Sr. Manager, Maximus and Jenny Smolnik, Sr. Manager, Maximus



Thursday, September 21st, 2023
3:15 PM – 4:30 PM

The Importance of Asset Management: A Case Study (4.1)

Attendees will have a better understanding of challenges and solutions for Asset Management and Financial Reporting Requirements through the example of a Case Study. We will discuss the importance of Asset Management for your institutions Real Property (Land, Land Improvements, Infrastructure, Buildings/Building Improvements), as well as the importance of Building Componentization Studies, as well as Fixed Equipment, Moveable Equipment and Physical Space inventories.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Kevin McHugh, Vice President, Maximus and Kevin Mack, Divisional Finance Leader & Asst. Director of Costing Policy and Analysis, University of California Berkeley

Planning and Managing the F&A Process (4.2)

This session will review ideas to organize the many tasks that are a part of the proposal process.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Chuck Wuensch, Sr. Manager, Maximus; David Moore, Sr. Consultant, Maximus; Shelly Benson, Sr. Director of Gov't Cost Accounting, University of Illinois Urbana; and Jaime Bunner, Director, West Virginia University

WebSpace Forum (4.3)

In this session, we will review the functionality available in the latest version of WebSpace as well as begin the discussion of potential improvements for future releases of WebSpace.

Course Level: WebSpace
Track: WebSpace
Course Method: Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Inna Gvozdeva, Director, Maximus and Pai Siwamutita, Developer, Maximus



CRIS Lab - Importing of Data (4.4)

This lab will demonstrate features for importing data into CRIS, including appending records, updating records, and performing a file analysis before importing data.

Course Level: All
Track: CRIS
Course Method: Hands-On Lab
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Jen Rowles, Manager, Maximus and Mike Meunier, Sr. Consultant, Maximus

Friday, September 22nd, 2023
8:30 AM – 9:45 AM

Allocations & Statistics - Part 2: User Defined Stats (5.1)

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 3. 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
Speakers: Caroline Beeman, Director, Maximus and Chuck Wuensch, Sr. Manager, Maximus

Space Surveys - The University Perspective (5.2)

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 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. We will discuss the approach one institution used to launch the space survey including training, implementation, and quality review.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Mitzi Singleton, Sr. Manager, Maximus; Steve Sax, Sr. Consultant, Maximus; Becky Clogston, Asst. Director OSP, Dartmouth College; Tommy Nunez, Asst. Director of Facilities Cost Analysis, Boston University; and Sarah Kern & Lindsey Havranek, Arizona State University



What Management Needs to Know about F&A (5.3)

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
Speaker: Chuck Wuensch, Sr. Manager, Maximus; David Moore, Sr. Consultant, Maximus; Kimberly Croft, Director of Cost Analysis, MIT; and Brian Kimball, Assoc. Director of Cost Analysis, Harvard University

CRIS Lab - Reporting in CRIS (5.4)

This session will be a structured step-by-step introduction to 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: None
CPE Credit: 1.0
Speaker: Jen Rowles, Manager, Maximus and Mike Meunier, Sr. Consultant, Maximus

Friday, September 22nd, 2023
10:15 AM – 11:30 AM

Allocations & Statistics Part 3 - Troubleshooting Allocations (6.1)

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 and 2. This session will have examples for troubleshooting allocations and statistics.

Course Level: All
Track: CRIS
Course Method: Presentation
Course Prerequisites: Familiarity with CRIS
CPE Credit: 1.0
Speaker: Caroline Beeman, Director, Maximus and Chuck Wuensch, Sr. Manager, Maximus



The False Claims Act and OIG Audit Findings (6.2)

This session will review university audit findings related to False Claims Act investigations and Office of Inspector General audits. Findings will be broken down and discussed for potential internal controls that could be put in place within university's operations to mitigate risk.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Jason Guilbeault, AVP, Sponsored Programs Administration, Augusta University

Fringe Benefit Rates - Panel (6.3)

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
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Mira Levine, Sr. Manager, Maximus; Jim Childers, Sr. Consultant, Maximus; Shelly Benson, Sr. Director of Gov't Cost Accounting, University of Illinois Urbana; Susie Won, Director of Cost Analysis, University of Pennsylvania; Jonathon Jeffries, Director of Cost Accounting, Georgia Tech; and David Schultz, Asst. VP for Sponsored Research Accounting, University of Houston

CRIS Lab - Space Processing and Analytics (6.4)

In this session, we will demonstrate how to use CRIS reports and views to look at space data from various angles. We will address how to detect issues in the processing of space data and verify the university's space is appropriately representing the university.

Course Level: All
Track: CRIS
Course Method: Hands-On Lab
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Mitzi Singleton, Sr. Manager, Maximus and Jen Rowles, Manager, Maximus



Saturday, September 23rd, 2023
8:30 AM – 9:45 AM

Service Centers – Service Center Topics (7.1)

This session will include presentation of a variety of service center topics past audit findings and how to avoid them at your university. We will discuss recent impacts on service center operations and ways to deal with those impacts.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Caroline Beeman, Director, Maximus; Jenny Smolnik, Sr. Manager, Maximus; Jim Childers, Sr. Consultant, Maximus; and Gina Hooten, Manager, Utah State University

How WebSpace Can Help (7.2)

In this session, we will provide an in-depth demonstration of WebSpace and discuss how it can be used in a new hybrid work environment.

Course Level: All
Track: WebSpace
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Inna Gvozdeva, Director, Maximus and Tommy Nunez, Asst. Director of Facilities Cost Analysis, Boston University

Rate Extensions and Facilities Cost Projections (7.3)

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
Speaker: Chuck Wuensch, Sr. Manager, Maximus and David Moore, Sr. Consultant, Maximus



CRIS Lab - Useful Tools and Helpful Hints (7.4)

This session will cover useful tools and helpful hints when working in CRIS.

Course Level: All
Track: CRIS
Course Method: Hands-On Lab
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Inna Gvozdeva, Director, Maximus and Jen Rowles, Manager, Maximus

Saturday, September 23rd, 2023
10:15 AM – 11:30 AM

Discussion Group: Fringe Benefits - Panel (8.1)

This session will allow the university participants to discuss the unique circumstances at their university, and address concerns with fringe benefit rates.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Mira Levine, Sr. Manager, Maximus; Jim Childers, Sr. Consultant, Maximus; Jonathon Jeffries, Director of Cost Accounting, Georgia Tech and David Schultz, Asst VP for Sponsored Research Acctg, Univ of Houston

Discussion Group: Service Center Topics (8.2)

This session will allow the university participants to discuss the unique circumstances at their university, and address concerns with service center rates.

Course Level: All
Track: Costing
Course Method: Discussion
Course Prerequisites: None
CPE Credit: 1.0
Speakers: Caroline Beeman, Director, Maximus; Jenny Smolnik, Sr. Manager, Maximus; and Gina Hooten, Manager, Utah State University



Optimizing the Operations & Maintenance Component (8.3)

This session will present ways to optimizing the Operations & Maintenance component.

Course Level: All
Track: Costing
Course Method: Presentation
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Mitzi Singleton, Sr. Manager, Maximus and David Moore, Sr. Consultant, Maximus

CRIS Lab - Allocations (8.4)

In this session, we will demonstrate navigating through allocation data and reports in CRIS, using the Stepdown Schedule, Review System Messages, Allocation, and Allocation Detail. We will look at identifying and cleaning up stepdown issues, as well as verifying the allocation results.

Course Level: All
Track: CRIS
Course Method: Hands-On Lab
Course Prerequisites: None
CPE Credit: 1.0
Speaker: Inna Gvozdeva, Director, Maximus and Jen Rowles, Manager, Maximus

**The Maximus 36th Annual Higher Education Onsite Meeting concludes at 1:00 PM
on Saturday, September 23rd, 2023.**