The Latest Buzz with G&C Accounting

Tuesday, October 25, 2022
1:00 – 2:30 PM

GT Georgia Tech®

Agenda

Topic	Presenter(s)
Welcome, Post Award Research Updates	Josh Rosenberg
Commitment Accounting Updates	Terryl Barnes
Project Accounting Updates	Glenn Campopiano
Cost Accounting Updates	Jonathon Jeffries
Compliance Updates	Charles H. Derricotte III
Workday and Reporting Updates	Amy Zhang
Training Updates	Rob Roy
Closing	Josh Rosenberg

Post Award Research Updates

Josh Rosenberg

Sr. Director, Grants and Contracts

RI Sponsored Programs

AWARD DATA: FY19 – 23 (YTD through Period 3: September)

AWARDS: Cumulative Report thru: SEPTEMBER					
College/Unit	**FY23**		**FY22**		**Award Dollar Variance**
	Awarded Amount	Awards	Awarded Amount	Awards	
COMP	$15,140,448	53	$10,004,250	40	51.3%
COS	$17,889,449	97	$28,143,100	119	-36.4%
DSGN	$3,036,922	145	$5,866,284	193	-48.2%
ENGR	$102,251,490	367	$101,145,586	389	1.1%
GTRI	$300,274,926	310	$260,943,704	262	15.1%
IAC	$4,322,145	21	$1,367,154	13	216.1%
OTHERS	$22,952,764	94	$40,619,859	100	-43.5%
SCB	$468,582	3	$223,225	2	
Total	**$466,336,725**	**1,090**	**$448,313,162**	**1,118**	**4.0%**
Resident Instruction and Other	**$166,061,799**	**780**	**$187,369,458**	**856**	**-11.4%**

Awards		
	YTD (Sept.)	Full Year
FY23	$ 166,061,799	
FY22	$ 187,369,458	443,169,708
FY21	$ 157,956,013	415,738,536
FY20	$ 129,087,445	402,520,391
FY19	$ 144,283,446	406,662,163

Key Takeaways:
- Awards for Georgia Tech totaled over $466 million, with the average award size at $427K.
- On the RI side, awards decreased 11.4% to $166 million (we had a few very large NSF, Dept. of Education, and Dept. of Energy awards in early FY22).
- After a relatively slow July, RI awards have been very strong in August and September.

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RI Sponsored Programs

SPONSOR AWARD DATA: FY22 – 23 (YTD through Period 3: September)

RI NEW AWARDS (Through September)						
Federal Agency or Sponsor Type	**FY23**	**% of RI Portfolio**	**FY22**	**23 v. 22 $ Variance**	**23 v. 22 % Variance**	**5 Year Avg**
NATIONAL SCIENCE FOUNDATION (NSF)	53,945,409	32%	56,018,918	(2,073,509)	-4%	51,871,563
DHHS	23,292,222	14%	23,118,605	173,617	1%	21,385,462
INDUSTRIAL SPONSORS	18,804,927	11%	21,260,517	(2,455,590)	-12%	15,584,408
US DEPT OF ENERGY	12,635,645	8%	20,487,372	(7,851,727)	-38%	12,549,564
COLL/UNIV/RES INST.	9,538,365	6%	11,019,865	(1,481,500)	-13%	12,421,754
NAVY	8,902,109	5%	6,888,346	2,013,763	29%	4,739,598
INDUS RES INST/FDNS/SOC.	5,688,757	3%	11,698,851	(6,010,094)	-51%	8,352,782
US DEPT OF EDUCATION	4,193,319	3%	17,337,371	(13,144,052)		5,857,738
NASA	4,048,071	2%	6,708,087	(2,660,016)	-40%	3,794,292
ARMY	3,875,350	2%	1,745,210	2,130,140	122%	2,033,834
US DEPT OF TRANSPORTATION	3,853,597	2%	5,000			1,472,248
STATE & LOCAL GOVERNMENT	3,822,662	2%	1,968,178	1,854,484	94%	3,644,867
US DEPT OF COMMERCE	3,752,436	2%	2,554,752	1,197,684	47%	2,110,109
AIR FORCE	2,929,294	2%	1,960,777	968,517	49%	3,770,497
GOVT-OWNED/CONTRACTOR OP.	2,639,377	2%	1,302,780	1,336,597	103%	2,012,447
Grand Total	166,061,799	100%	187,369,458	(21,307,659)	-11.4%	159,084,194

Key Takeaways:
- Top 15 sponsor types/agencies by award dollars in FY23 listed above; totals at the bottom reflect awards from all sponsors.
- Almost two-thirds of our award dollars come from four sponsor types (NSF, Industry, DHHS, and Dept. of Energy).
- Biggest decreases in Dept. of Education, Dept. of Energy, and NASA.

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RI Sponsored Programs

EXPENSE DATA: FY19 – 23 (YTD through Period 3: September)

Expenditure Analysis: September	FY23 YTD	FY22 YTD	Change
Salaries and Wages	36,384,410	34,939,272	4.1%
Other Direct Costs	11,220,868	21,510,045	-47.8%
Subcontracts	15,045,045	18,358,333	-18.0%
Fringe Benefits	7,496,989	7,450,902	0.6%
Tuition Remission	7,554,187	7,219,359	4.6%
M&S	7,388,181	5,866,043	25.9%
Equipment	2,420,782	1,401,508	72.7%
Domestic Travel	1,678,654	243,613	589.1%
Foreign Travel	543,596	98,401	452.4%
Unallocated	51,202	49,874	2.7%
High Performance Computing	17,311	5,249	100.0%
DIRECT	**89,801,226**	**97,142,600**	**-7.6%**
IDC	**27,270,516**	**25,373,522**	**7.5%**
Total	**117,071,742**	**122,516,123**	**-4.4%**

Expenditures - Direct		YTD (Sept.)	Full Year
FY23	$	89,801,226	
FY22	$	97,142,600	330,920,330
FY21	$	73,857,914	294,248,586
FY20	$	70,548,712	286,744,676
FY19	$	76,715,365	279,599,249

Expenditures - Indirect		YTD (Sept.)	Full Year
FY23	$	27,270,516	
FY22	$	25,373,522	93,079,082
FY21	$	22,233,741	86,156,912
FY20	$	23,085,473	84,764,909
FY19	$	23,277,762	86,087,217

Key Takeaways:
- Direct expenditures are down 7.6% YOY and indirect expenditures are up 7.5% YOY.
- The big decrease in direct expenditures is due to HEERF funding (found in "Other Direct Costs") in FY22 not occurring in FY23.
- Salaries and fringe benefits combined have increased 3.5% YOY.
- For the first time in the last several years, subcontracts have decreased YOY (18.0%).
- Materials and Supplies are up almost 26% YOY.
- Domestic and foreign travel expenses have increased significantly with the relaxing of travel restrictions.

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RI Sponsored Programs

Grants and Contracts INVOICING and FINANCIAL REPORTING
FY22 – FY23 (YTD through Period 3: September)

INVOICING

Invoicing YTD FY2022 vs. FY2023 (thru September)

Invoice Types	FY23 (September)	Monthly FY23 average	FY22 (September)
G&C GIT Standard	$ 46,128	$ 15,375.96	$ 1,154,556
G&C GIT Standard Certification Required	$ 142,002	$ 47,334	$ 169,730
G&C GTRC Custom Certification Required	$ 1,151,052	$ 383,684	$ 2,074,560
G&C GTRC Standard	$ 8,052,884	$ 2,684,295	$ 12,407,079
G&C GTRC Standard Certification Required	$ 21,300,693	$ 7,100,231	$ 19,365,454
G&C In House	$ 10,004,864	$ 3,334,955	$ 12,647,224
G&C LOC Draw	$ 45,513,733	$ 15,171,244	$ 40,922,782
G&C SF1034	$ 3,480,310	$ 1,160,103	$ 3,614,698
G&C SF 270	$ 15,461,967	$ 5,153,989	$ 12,025,880
Grand Total	**$ 105,153,632**	**$ 35,051,211**	**$ 104,381,966**
Raw Invoice Counts	**3,103**	**1,034**	**3,884**

Year over Year Invoicing Change	Dollars	Invoice Counts
YTD change in FY23 over FY22	$ 771,666	(781)
YTD percentage change	0.7%	-20.1%

FINANCIAL REPORTS

Financial Reports YTD FY2022 vs. FY2023 (thru September)

Report Types	FY23 (Sept.)	FY22 (Sept.)
Annual Financial Report	37	22
Final Financial Report	45	51
Revised Financial Report	-	1
Monthly Financial Report	48	45
Quarterly Financial Report	126	136
Semi-Annual Financial Report	7	3
TOTALS	**263**	**258**

Year over Year Invoicing Change	Report Counts
YTD change in FY23 over FY22	5
YTD percentage change	1.9%

Notes:

- GTRC cash position (as of Sept. 29) → largely funded through G&C invoicing: $113.9 million.
- The increase in invoiced dollars year over year reflects the increase in expenditures, which typically lags increases in awards.
- Invoice counts are lower primarily due to the number of LOC draws performed per month. It doesn't impact the dollars collected, but it does impact the counts.

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RI Sponsored Programs

Grants and Contracts: FINANCIAL ANALYSIS: FY22 – FY23 (YTD through Period 3: September)

JOURNALS BY THE ANALYST TEAM	FY23	% of Total	FY22	% of Total	% Chg FY
Journals (Total)	342		242		41%
Appropriate Grants Management	243	71%	150	62%	
"Red Flag" Grants Management	99	29%	92	38%	

Appropriate Grants Management: F&A adjustments, accounting adjustments, in-kind cost sharing, month-end entries, audit, blank object class, tuition correction, equipment entries.

"Red Flag" Grants Management: Primarily prior year Salary and Planning Distribution (SPD) transfers, past term/overages.

Key Takeaways:
- While journals have increased 41% YOY, the percentage that reflect "appropriate" grants management has improved from 62% to 71% (this is a very positive increase from a compliance standpoint).
- Independent of journal activity through September, the analyst team managed 294 award initiations, 709 award modifications, 1,516 award corrections, and 131 service now tickets.

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RI Sponsored Programs

Award Dollars in Exception Status

AWARD EXCEPTIONS (Overspent) - as of Oct. 1			
Department (Top 15 for largest exceptions)	Past-term	In-Performance	Grand Total
Financial Aid	(11,156,643)	(7,499,258)	(18,655,901)
School of Computer Science	(821,975)	(351,539)	(1,173,514)
Electrical and Computer Engineering	(488,210)	(1,964,237)	(2,452,447)
General Institutional Expense	(444,336)	(44,966)	(489,302)
Mechanical Engineering	(360,819)	(1,793,328)	(2,154,147)
Institute for Bioengineering & Bioscience	(326,018)	(638,798)	(964,817)
Aerospace Engineering	(297,177)	(899,391)	(1,196,568)
Industrial And Systems Engineering	(144,742)	(455,416)	(600,157)
Institute for Robotics and Intelligent Machines	(143,349)		(143,349)
Institute for People and Technology	(138,570)		(138,570)
GT/Emory Biomedical Engineering	(85,661)	(707,619)	(793,280)
Chemistry and Biochemistry	(82,647)	(621,073)	(703,721)
Materials Science and Engineering	(61,372)	(920,339)	(981,711)
School of Interactive Computing	(52,641)	(96,645)	(149,286)
The Machine Learning Center	(43,948)		(43,948)
Grand Total (ALL departments)	(14,780,865)	(20,669,875)	(35,450,740)
Non-Financial Aid	(3,624,222)	(13,170,617)	(16,794,839)

Key Takeaways:
- This data represents awards where actual spending plus obligations and commitments exceeds the current budget.
- The biggest risk area is dollars associated with "past-term" awards (the end date has passed).
- Each month at the beginning of the month, Grants and Contracts provides exception reports at both the award and individual grant level to unit financial managers.
- We are also now sending out a cost share exception report to help units manage cost share requirements.

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PI Articles

PI Articles

PI ARTICLE: An Inventory of Sponsor Required Reports (October, 2022) (_PDF Download_)

PI ARTICLE: How do Fringe Benefit Rates work at Georgia Tech? (September, 2022) (_PDF Download_)

PI ARTICLE: The Mysterious and Very Important F&A Cost Reimbursement Rate (August, 2022) (_PDF Download_)

PI ARTICLE: Subrecipient Monitoring – Roles and Responsibilities (July, 2022) (_PDF Download_)

PI ARTICLE: OSP and G&C – Who Does What? (June, 2022) (_PDF Download_)

PI ARTICLE: How Much Money Do I Have? (May, 2022) (_PDF Download_)

PI ARTICLE: Sponsored Award Management – Timeline and Tasks (Apr, 2022) (_PDF Download_)

Notes:
- PI Articles that I will be writing and issuing each month for research faculty and unit financial staff are available on our grants and contracts website (https://www.grants.gatech.edu/pi-articles).
- The first seven are shown in the screen shot above and available online.
- These are also distributed through various list servs and I send them directly to department chairs.

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Commitment Accounting Updates

Terryl Barnes

Commitment Accounting Manager

Commitment Accounting Reminders

- Review salary distribution with July pay period end dates. July pay periods will be over 90 days after October.

- Exceptions to EDR salary cost transfers over the 90-day limit:
  - In situations where initial or continuing sponsor funding is delayed beyond 90 days after the effective date, consideration for recognition of cost transfers beyond the limit will be addressed by the Grants & Contracts Accounting Office if the transfer is requested within the reporting period of the sponsored project (typically 60 -90 days after the expiration date of the project).

  - If the terms and conditions of the sponsored agreement provide for acceptance and payment of the expenses covered by the proposed cost transfer and appropriate supporting documentation is provided, the Senior Director of Grants & Contracts Accounting may approve the proposed transfer.

  - Submit over 90 requests via GT Servicenow (Financials)

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New Approval Workflow

With the Administrative Services Center (ASC) in place, there have been reductions in the number of approval steps needed for MSS transactions.

- The Level 1 and Level 2 approvers consolidated into Level 1

- Only one approver required unless an adhoc approver is needed from another department

- Insert adhoc approver must be inserted before level 1 approves

- Insert adhoc approver between level 1 and level 5

- Adhoc approver can be removed prior to the transaction reaching them for approval
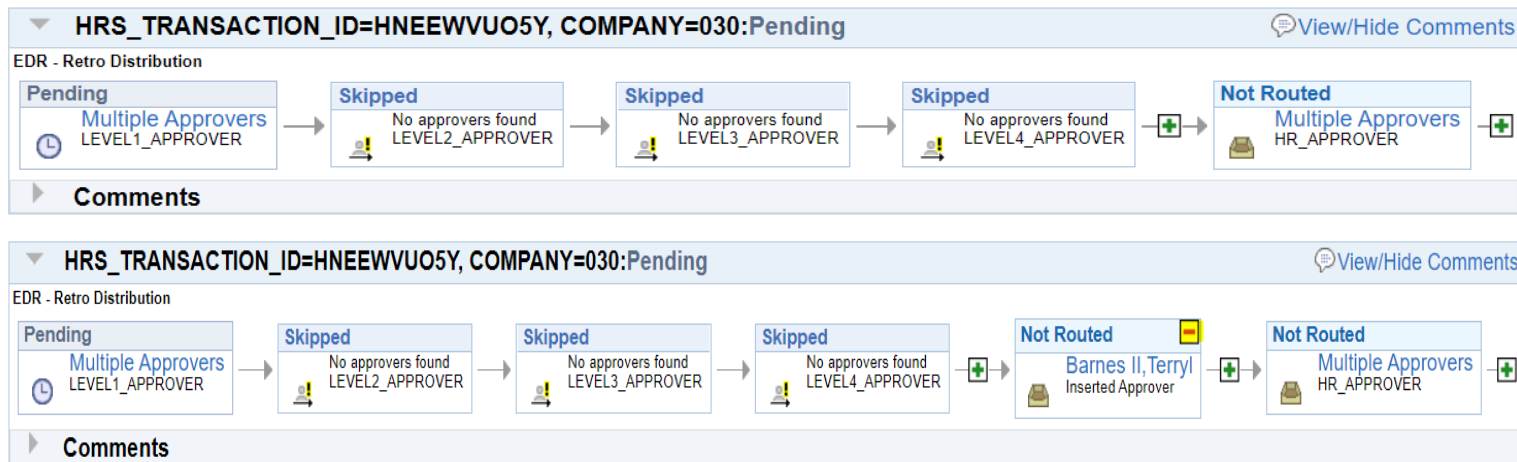
Commitment Accounting Office Hours

- Please join us with your questions

- When: Wednesday October 26 1pm-3pm

- Where: Microsoft Teams (link sent to CA listserv)

- Topics: Reports/Queries, Change Position Funding and Express Direct Retro transactions.

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Additional Resources

- Helpful queries: Enter Query name in Query viewer

  o BOR_CA_POSITION_FUNDING – view position funding

  o BOR_CA_EDR_STATUS – view status of EDR transactions

  o BOR_CA_EDR_LOCKS – Locked EDR transactions

  o BOR_HR_VACANT_POSITIONS - Vacant Positions

  o BOR_CA_CHG_FUND_LOCK - Change Position Funding Locks

- On demand training videos:

  o Media Space: https://mediaspace.gatech.edu/playlist/details/1_8lgt469g

  o HR Geniussis Training Site: https://gatech.geniussis.com/FERegistration.aspx

Project Accounting Updates

Glenn Campopiano

Director, Project Accounting

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Sponsored Award Budget Revisions

- During the life of a sponsored project, there may arise a need to revise the approved financial plan (budget) for the project.

- Budget revisions under federal awards will be processed in compliance with 2 CFR 200.308 ["Revision of budget and program plans"]. Many federal agencies have waived some prior approvals required for budget revisions under research awards using the principle of "expanded authorities." For all projects, review the terms and conditions of your award for information regarding budget revisions.

- The following actions normally require processing by your Contracting Officer and prior approval of the sponsor:

- Change in the amount of participant support costs

- Change in the amount of approved cost sharing/matching

- Change in a key person specified in the application or Federal award

- Budget revisions which result in significant changes in the scope of the project

- Budget revisions which result in a 25% or more reduction of effort for the principal investigator/project director (PI/PD)

- Budget revisions which result in a 10% overall change in the budget last approved by the federal sponsor

- The award terms and/or sponsor policy require prior approval for budget revisions

Sponsored Award Budget Revisions

- Some non-Federal sponsors have more restrictive budget revision rules.
- For example on some GDOT awards budget variances greater than 5% need prior approval.
- Budget revision requests need to go through OSP and when approved/completed they will flow to G&C to update WD.
- Best practice is to stay within the budgeted spend categories.
- Equipment and Equipment Fabrication need extra attention to ensure correct posting of expense.
- Don't use foreign travel if you have no foreign travel budgeted.

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New Cost Share Exception Report

Prior to WorkDay G&C provided a cost share progress report. G&C helped develop the Cost Share Fund in Progress Report. (GT RPT Cost Share Fund in Progress Report) This report is very helpful to get a picture of your cost share progress.

Many sponsors are now requiring cost share expenses and matching expenses to be in step with the sponsor burn rates. They are not paying invoices if cost share is not met month to month.

G&C has developed a Cost Share Exception report that will go out monthly with the Award/Grant exception report. This report compares the burn rate of the sponsored funds to the burn rate of the cost share funds in the correct ratio i.e. 1 to 1. Cost share that is not within 10% of this ratio will be flagged as in exception.

It will be up to the unit to decide if any action is needed as the there are many valid reasons for being in exception – for example waiting on an equipment purchase or 3rd party in kind. Please use this report to identify those grants that are need of additional cost share that for whatever reason has not posted.

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New Cost Share Exception Report

	Award	Award Sponsor	Award Lifecycle Status	Cost Center	Award End Date	Funded amount	Sponsor Expenses	Sponsored PCT	Total Cost Share Amount	Cost Share Expenses	Cost share PCT	Months Left for Award	Cost share required	Total Cost share Amount /Funded Amount ratio	Cost share PCT should be	10%	minimium Cost Share PCT	Exception
2	AWD-002262:	PRATT & WHITNEY	dministrative Review	CC000003 AE -	12/31/2021	148,000.00	$170,358.03	115.11%	$44,400.00	$6,317.40	14.23%	(8)	38,082.60	30%	100%	10%	90%	Exception
3	AWD-002261:	PRATT & WHITNEY	Close Out	CC000003 AE -	12/31/2021	148,000.00	$125,300.83	84.66%	$44,400.00	$29,080.98	65.50%	(8)	8,509.27	30%	85%	10%	75%	Exception
4	AWD-103278: A	ALFRED P SLOAN	Close Out	CC000003 AE -	6/30/2022	320,000.00	$314,146.49	98.17%	$16,080,645.00	$9,438,664.46	58.70%	(2)	6,347,829.86	5025%	98%	10%	88%	Exception
5	AWD-101190:	ARMY/FT EUSTIS/ VA	Close Out	CC000003 AE -	6/30/2022	7,728,192.00	$7,721,548.12	99.91%	$8,086,656.92	$5,670,826.55	70.13%	(2)	2,408,878.32	105%	100%	10%	90%	Exception
6	AWD-101660:	US DEPT OF	Close Out	CC000003 AE -	6/30/2022	789,796.00	$838,720.04	106.19%	$197,544.00	$143,539.58	72.66%	(2)	54,004.42	25%	100%	10%	90%	Exception
7	AWD-001222:	US DEPT OF	Active	CC000003 AE -	9/30/2022	1,000,000.00	$516,803.40	51.68%	$1,000,000.00	$268,857.43	26.89%	0	247,945.97	100%	52%	10%	42%	Exception
8	AWD-003244:	AEROSPACE CORP	Active	CC000003 AE -	9/30/2022	80,001.00	$74,148.50	92.68%	$15,148.35	$7,417.64	48.97%	0	6,622.53	19%	93%	10%	83%	Exception
9	AWD-003507:	PRATT & WHITNEY	Active	CC000003 AE -	12/31/2022	148,000.00	$114,322.93	77.25%	$44,453.00	$10,024.74	22.55%	3	24,313.08	30%	77%	10%	67%	Exception
10	AWD-003510:	PRATT & WHITNEY	Active	CC000003 AE -	12/31/2022	148,000.00	$100,047.36	67.60%	$44,400.00	$10,024.74	22.58%	3	19,989.47	30%	68%	10%	58%	Exception
11	AWD-000844:	US DEPT OF	Active	CC000003 AE -	1/13/2023	3,499,984.00	$2,611,963.78	74.63%	$2,999,984.00	$1,647,232.01	54.91%	4	591,592.38	86%	75%	10%	65%	Exception
12	AWD-001709:	US DEPT OF	Active	CC000003 AE -	8/31/2023	1,000,000.00	$559,814.37	55.98%	$1,000,000.00	$391,070.53	39.11%	11	168,743.84	100%	56%	10%	46%	Exception
13	AWD-001667:	US DEPT OF	Active	CC000003 AE -	9/30/2023	1,999,995.00	$1,694,509.81	84.73%	$1,999,995.00	$979,076.91	48.95%	12	715,432.90	100%	85%	10%	75%	Exception
14	AWD-002709:	NASA/GENERAL	Active	CC000003 AE -	7/31/2024	1,808,252.28	$900,318.28	49.79%	$459,789.21	$49,294.31	10.72%	22	179,632.06	25%	50%	10%	40%	Exception
15	AWD-002830:	US DEPT OF	Active	CC000003 AE -	9/14/2024	799,997.00	$208,068.11	26.01%	$200,002.00	$5,593.88	2.80%	24	46,423.86	25%	26%	10%	16%	Exception
16	AWD-002983:	ARMY/FT EUSTIS/ VA	Active	CC000003 AE -	9/30/2026	1,704,502.61	$402,772.48	23.63%	$1,816,468.63	$11,743.06	0.65%	48	417,486.89	107%	24%	10%	14%	Exception
17	AWD-001305:	US DEPT OF	Active	CC000004 ASDL -	9/30/2022	470,000.00	$409,409.43	87.11%	$470,000.00	$295,834.07	62.94%	0	113,575.36	100%	87%	10%	77%	Exception
18	AWD-001659:	NATIONAL INSTITUTE OF	Active	CC000004 ASDL -	12/31/2022	525,434.00	$475,118.47	90.42%	$246,847.00	$118,542.49	48.02%	3	104,666.46	47%	90%	10%	80%	Exception
19	AWD-000921:	US DEPT OF	Active	CC000004 ASDL -	2/4/2023	590,000.00	$594,398.05	100.75%	$590,000.00	$438,596.86	74.34%	4	151,403.14	100%	100%	10%	90%	Exception

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Project Accounting

Grants and Contracts Accounting Office Hours

The Project Accounting Management Team is hosting monthly, virtual "Office Hours" for campus. Anyone is welcome to join and ask questions on **the last Monday of each month, between 10:00am and 11:00am.**

- For billing and reporting questions: **Mary Balsor, CRA** - **Accounting Manager** - Invoicing & Financial Reporting,

- For award set-up, modifications, grant and award line questions: **Douglas Feller, CRA** - **Financial Manager** - Financial Administration,

- For general G&C questions: **Glenn Campopiano, CRA** - **Director - Project Accounting**.

Office hour with Glenn Campopiano

via Microsoft Teams
Join on your computer or mobile app
Click here to join the meeting
Or call in (audio only)
+1 470-705-2566,,23697690# United States, Atlanta
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Join Office Hour with Glenn

Office hour with Douglas Feller

via Microsoft Teams
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Join Office Hour with Doug

Office hour with Mary Balsor

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Join Office Hour with Mary

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Cost Accounting Updates

Jonathon Jeffries

Director - Cost Accounting

Annual Statement of Reasonableness and SCARVs

- 1,044 (17%) FY22 ASRs outstanding as of Friday, October 21st

- 449 of electronically approved ASRs still require Unit Financial Manger approval (9%)

- Unit Financial Mangers updates can be made by emailing help desk at easr.ask@business.gatech.edu

- ASRs were due by 8/31, we will send a few more email blasts

- Paper ASRs were distributed to the department of record

- SCARVs were due September 30th

Facilities and Administrative Reports

- Grants and Contract posts a F&A recovery report monthly to our [website](#)
- Provides high level College or Unit recovery information

Grants and Contracts Accounting

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Home

Facilities and Administrative Reports

📄**FY 2023 – September 30 F&A Cost Recoveries Report**(PDF)

📄**FY 2022 – June 30 F&A Cost Recoveries Report**(PDF)

FY 2021 – June 30 F&A Cost Recoveries Report

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Facilities and Administrative Reports- Workday

- **G&C F&A Org Unit Inquiry**
- Output includes Grant, Grant PI, Gross Indirect Expenditures, and Net Indirect Expenditures

G&C F&A Org Unit Inquiry

Cost Center Hierarchy (Level 4)   Search

Period   *

OK   Cancel

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Facilities and Administrative Reports- Workday

- **GT FYTD RI and Oth Unit Sponsored Expenditures by PI - GTCR**
- Output includes Cost Center, Award, Award PI, Grant, Grant PI, Total Expenditures, Direct Expenditures, Gross Indirect Expenditures, and Net Expenditures Costs

Compliance Updates

Charles H. Derricotte III

Financial Compliance Program Manager

Georgia Tech

2.1.6 – P.I Minimum Effort - Policy

- Georgia Tech policy is that a Principal Investigator (PI) or other senior researcher must devote at least 1% effort – or a level of effort as required by sponsor – on an ongoing basis over the term of a sponsored project award.

- Ongoing basis means per budget year over the life of the project.

- The federal government expects a commitment of some effort on the part of the principal investigator for conducting work, over-seeing students, preparing deliverables, etc. during each project year. This effort may be expended during the academic year or summer and may be charged to the project or paid by the Institute and treated as cost sharing

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2.1.6 – P.I Minimum Effort - Testing

- Reviewed population of significant sponsors (NSF,NIH)
- Chose awards where end dates were between 9/30/22 & 12/31/22
- Verified senior personnel recorded effort on award during last fiscal year cost was recorded for award.

Total Sample	92	0%	Percentage Remaining to Complete
True(Compliant)	73	79%	Percentage Compliant
False(non-Compliant)	17	18%	Percentage Non-Compliant
(Other) Classification of award with circumstance outside of compliance decision.	2	2%	Other Percentage

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2.1.6 – P.I Minimum Effort – Observations and Best Practices

- Compliant awards maintained some level of Senior Personnel effort or was a grant exception (travel grant, conference grant, or limited purpose)

- Non-compliant awards had P.I effort early in grant, yet in middle years only had GRA/GTA employees on award. Some did not have P.I effort at anytime on award

- Best Practices: Make sure to maintain some level of effort on a ongoing basis on award per policy 2.1.6. This shows sponsors proper management when a review occurs. If the PI(or other senior personnel) chooses to cost share the 1% minimum effort instead of charging it to the sponsored project, a formal companion cost share account must be established. A video on minimum effort training can be found on our policy web-site.

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Workday Reporting Updates

Amy Zhang
Application Support Analyst Lead

Workday Reporting Updates

SABER reports users now can sort Actuals drill down information in State of Georgia Fiscal Period order (July to June). This feature is convenient for users to look at Actuals by months and drill down further in the months by object class or details. It applies to Obligations and Commitments drill down as well.

Criteria View by: [Object Class ▼] and then by: [Period ▼] (Refresh)

5 items

Object Class	Jul	Aug	Sep	Jan	Feb	Apr	May	Jun	Actuals
Georgia Tech: 4000 Materials and Supplies	0.00	0.00	0.00	$0.00	0.00	0.00	0.00	0.00	$0.00
Georgia Tech: 5000 Subcontracts	$12,489.27	$0.00	$14,926.12	0.00	$115,404.34	$13,286.76	$40,800.38	$224,100.17	$421,007.04
Georgia Tech: 9000 Sponsored Indirect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	$0.00	$0.00
Georgia Tech: 9100 Sponsored Indirect - Conversion as of 6/30/19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	$2,000.00	$2,000.00
Total	$12,489.27	$0.00	$14,926.12	$0.00	$115,404.34	$13,286.76	$40,800.38	$226,100.17	$423,007.04

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Upcoming

- Cost share exception report in Workday or Lite

- Drill to link reports in Saber totals.

Training Updates

Rob Roy

Director of BOR Sponsored Programs

Georgia Tech.

Upcoming Courses

– Sign in with GT credentials and register!

Offered virtually, via Zoom, unless otherwise noted

OCTOBER

Cayuse Proposal System Training
October 25th
9:00am - 10:30am
Virtual

2 CFR 200 Workshop
October 26th
9:00am - 4:00pm
Virtual

NIH Proposal Preparation & Review Tips
October 26th
9:30am - 11:00am
Virtual

NIH F Series: Fellowship Program
October 26th
11:15am - 12:15pm
Virtual

eRouting Proposals Module
October 27th
2:00pm - 3:30pm
Virtual

NOVEMBER

Internal Controls Workshop
November 1st
10:00am - 3:00pm
Virtual

Post-Award & Compliance Part 2
November 2nd
12:30pm - 3:00pm
Virtual

Post-Award & Compliance Part 1
November 10th
9:30am - 12:00pm
Virtual

Pre-Award Part 2
November 14th
9:30am - 12:00pm
Virtual

Pre-Award Part 1
November 16th
12:30pm - 3:00pm
Virtual

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Upcoming Courses

– Sign in with GT credentials and register!

Offered virtually, via Zoom, unless otherwise noted

NOVEMBER (CONT.)

eRouting Proposals Module
November 17th
9:00am - 10:30pm
Virtual

Cayuse Proposal System Training
November 17th
2:00pm - 3:30am
Virtual

DECEMBER

Advanced Topics #4 (NEW CLASS)
December 8th
10:00am - 12:00pm
Virtual

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THANK YOU!

GRANTS.GATECH.EDU

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