

Labor Distribution Policy & Process Updates

**Business Process Review Workgroup Presentation
September 13, 2023**

Aedra McCarthy, OSRAA Director of
Sponsored Programs Award Management

Lisa Silbernagel, FSS Associate Director for
Research Administration and Accounting

Benita Bazemore-Cook, OSRAA Managing
Grant & Contract Administrator

Agenda

Workgroup members & Charge

Expanded scope

Evaluation, results and recommendations

Adopted policy – rollout, timeline, and communication

Training

Labor Distribution Workgroup

- Subgroup of broader RO/FSS workgroup – under direction of RO/CU leadership
- Team members:
 - Kelsey Herman – FSS/CEOAS (team lead)
 - Cindi Mafit – FSS/CAS
 - Jessica Jackson – RO
 - Helen Brittain - RO
 - Jonathan Rosa – FSS/RAA
 - Benita Bazemore-Cook – RO
 - Sarah Child – RO
 - Lisa Silbernagel – FSS/RAA

Agenda

Workgroup members & Charge

Expanded scope

Evaluation, results
and recommendations

Adopted policy –
rollout, timeline,
and communication

Training

Labor Distribution Workgroup

Charge to workgroup:

- Assess pilot for 90-day retro LDs approved in BC/FSS without OSRAA approval
- Make recommendation to continue/discontinue - *team recommended to continue*
 - Make corresponding policy recommendations - *completed and forwarded to project sponsors*
 - Develop corresponding training and communication plan, if needed – *completed and forwarded to project sponsors*

Agenda

Workgroup members
& Charge

Expanded scope

Evaluation, results,
recommendations

Adopted policy –
rollout, timeline,
and communication

Training

Labor Distribution Workgroup

Expanded scope to review/consider:

- Prior year labor distributions
- Subsequent corrections of same pay
- Effort changes which constitute a change in key personnel effort of more than 25% of committed effort
- Effort changes reflecting a change in scope

Agenda

Workgroup members
& Charge

Expanded scope

**Evaluation, results
and recommendations**

Adopted policy –
rollout, timeline,
and communication

Training

Labor Distribution Workgroup

- FSS survey conducted to assess understanding, interpretation, and consistency of current requirements and processes
- Considered risk/reward in evaluating each type of LD
- Reviewed peer institution policies
- Completed and submitted recommendations for:
 - Policy updates
 - FAQs, tools, and resources
 - LD form revisions
 - Communication and training plan

Agenda

Workgroup members
& Charge

Expanded scope

Evaluation, results
and recommendations

**Adopted policy –
rollout, timeline,
and communication**

Training

Implemented Policy Changes

- Incorporates revisions to business process and compliance
 - Full implementation of LD pilot program
 - Reduces number of unit and personnel “touches” while maintaining checks and balances
 - Authorizes trained FSS personnel to approve many sponsored project LDs
 - Removes LD approval routing through OSU Payroll
 - Clarifies next steps when LD requires sponsor prior approval action
 - Key personnel reduction of effort
 - Project scope of work changes
 - Other restrictions for certain awards

Agenda

Workgroup members
& Charge

Expanded scope

Evaluation, results
and recommendations

**Adopted policy –
rollout, timeline,
and communication**

Training

Timeline for Final Policy Update

- July: -Reviewed workgroup recommendations
- August: -RO leadership approved policy changes
- September: -Communication to stakeholders
-Finalize updates to form/instructions
- October: -Schedule training opportunities
-Post updates to OSRAA website
Policy & Guidelines
Form & Instructions
Tools: Approval Decision Tree, FAQs

Key Training Topics

Agenda

Workgroup members
& Charge

Expanded scope

Evaluation, results
and recommendations

Adopted policy –
rollout, timeline,
and communication

Training

- Reviewing 25% change in key personnel effort
- LD justification guidance for proper documentation
- Circumstances determining who approves LD form
- Revising the Personnel Activity Report (PAR)

Questions?