DGA Roundtable Minutes – February 4, 2019

**1:30 – 2:30 pm, IRIC 305 (above the Atrium)**

1. **Greetings and Introductions:**

Kendra Mingo, Senior Proposal Development Specialist from Research and Faculty Development is joining us today.

1. **Cost Share**: Information on how cost share works in Chart V is included with the agenda. If you have any questions, please feel free to ask at the meeting but note that we will likely have to take down the questions and get answers from Wendy Kerr when she returns from leave (and then share those with the group). Requests for a cost share index can be directed to [postaward@uidaho.edu](mailto:postaward@uidaho.edu). Questions regarding how cost share works or expenses on a cost share index can be directed to [osp-cost@uidaho.edu](mailto:osp-cost@uidaho.edu). *Responses to your questions from Wendy are included below in italics.*
2. **Minutes: The questions below are relating to cost share in Chart V and will be given to Wendy Kerr to provide answers. We will send that information out to the DGA listserv as appropriate**. Wendy may need to contact the ‘asker’ for clarification.
   * 1. **Cathy** – has question regarding what employees are being used as cost share – just a contra-expense on an OE line. For CNR, FUR (and IGS, CALS) the expense is against OE but it should be salary/fringe and you cannot rebudget in FUR for CNR. John Brabb can rebudget for IGS a few times a year using Trina’s assistance. Cathy notes that FER rebudgeting is an issue with JFAC reporting. **Clarification from Trina Mahoney on transfers in state appropriations to accommodate cost share in E5995** - We can move funds between state objects for FUR (so from personnel costs to operating, capital outlay, etc.). This applies to all of our state appropriations. The one thing we cannot do is move money up from non-personnel (OE or CO) to personnel – it needs to move down from personnel to non-personnel. *If there needs to be any movement between objects of the state appropriations based on how we are now tracking cost share, Trina will discuss the treatment of cost share with our DFM analyst before doing any “batches” (the state process for moving spending authority).*
     2. **Can OSP test FWRITEM on Cost Share grant?**  FWRITEM isn’t working at the moment and Heather Nelson has put in a ticket to ITS to have it fixed. *We will provide updates when we know more.*
     3. **Also,** **how would the DGA know which employee is providing the cost share on gen ed or FER funds? This is an issue on the providing account/index** – There is currently no single report that can get this information since the payroll is posted to the cost share index and the posting to the state appropriate funds is only to E5995. *Work on a report has started and we will let you know when it is available.*
     4. **General question: Timeline on page builder for cost share**-We are working on this project with ITS, it is close to being completed. After it is completed, we still need to build the new cost share report to incorporate the data in page builder (3rd party cost share, waived F&A obligations, etc.) with the data tracked in Banner. *This Cost Share report hasn’t been started yet, the hope is to have it done by the end of March. For now, we are manually combining the data based on the needs of our sponsors.*
     5. **What is the process for other sponsored projects where only part of the project is used as cost share to a federal project (John Brabb)**? *This will be treated as 3rd party cost share with a manual entry. The data will be entered in OSPRE until that system is decommissioned, and after that time the cost share will be entered on the page builder form.*
3. **DGA Roundtable changes**: We will focus most of the meeting here. We are hopeful that a few DGAs will volunteer to create a committee that helps to better focus and align Roundtable with the needs of the DGAs at all sites that can work in tandem with OSP to provide the best monthly meetings possible. Once we have all topics organized, additional presenter volunteers will be solicited by the committee.
   1. Kendra solicited input from DGAs for additional topics to be added to the lists using sticky notes and via Chat to Sarah, in zoom, and those sticky notes were added prior to voting. DGAs voted using sticky-dots during the meeting. Zoom participants voted via Chat to Sarah, in zoom, and those dots were added at the conclusion of the meeting.
      1. **Minutes**: Votes are tallied up and topics will be organized by ‘most requested’ in each category. The Committee will meet to arrange the schedule based on this and presenter availability.
      2. John Brabb, Theresa Albright, Mikayla Frey, Michele Mattoon and Eric Everett have volunteered to serve on the committee. We will be meeting next week to work out the details of upcoming meetings and format of the DGA Roundtable based on the results of the ‘topic’ rating exercise and DGA RT survey results.
4. **Post Award Updates** – Sarah –
   1. APM updates: <https://www.uidaho.edu/apm/45>
   2. Website updates
      1. Forms and templates: <https://www.uidaho.edu/research/faculty/resources/forms>
         1. All prior approval templates have been modified to correct Deb’s title.
         2. A section for NIH IDeA Pilot Project prior approvals has been added.
         3. Setup requests forms have been updated and include a new index request form.
      2. Roles and Responsibilities matrix: <https://www.uidaho.edu/research/faculty/dga#accordion-row-db41c0cf-1346-4206-b62f-d7bfb2a8a7e5->.
      3. Advance funding text updated: <https://www.uidaho.edu/research/faculty/dga#accordion-row-7f3ea831-4947-4a6f-8ad3-b1e78ee141cb->
      4. Details on participant support: <https://www.uidaho.edu/-/media/UIdaho-Responsive/Files/research/Faculty/DGA/Participant-support-costs-5,-d-,11,-d-,17.pdf?la=en&hash=AA66F5372B79CDE3F87F12454CA82F7EA15A8573>
   3. Early setup vs. advance funding – the group discussed the difference between an early setup and advance funding. In summary, advance funding is for the continuation of the same agreement (when an amendment or prior approval for additional time is pending) and an early setup is to be used when a NEW agreement is pending receipt and/or processing.
      1. APM 45.05 provides additional information and clarification.
   4. Early setup and advance funding VPR Guarantee clarification: The VPR guarantee option for advance funding and early setups ONLY applies to direct federal grant funding (not pass-through or contracts) and can only be used at up to 25% of the incoming increment. Any request above 25% of the incoming increment or greater than 3 months (or for pass-through) is not eligible for a VPR guarantee and must have a guarantee index and all three signatures. A VPR guarantee does not need signatures on the early setup form or a guarantee index if the above conditions are met.
      1. Advance funding always require an email and should be used before a grant project terms or goes into deficit (when expecting additional time and/or funding).
5. **Pre Award Updates** – Ann-Marie
   1. Ann-Marie will continue to provide updates on those sponsor services impacted by the government re-opening and is sending out information from federal sponsors as they are released to both the OSPPI and DGA listservs - watch for those emails. Please advise PIs that processing of proposals submitted during the shutdown will be delayed as review panels are rescheduled. Some future submission deadlines may have changed, and delays can be expected in the issuance of awards and related services.
   2. Kelly and Catie are both working in Pre-Award now – they are doing a great job and learning quickly – please show them your encouragement and support.
6. **Effort Reporting Changes** – Updates are forthcoming.