

Research Partnerships & Global Strategy

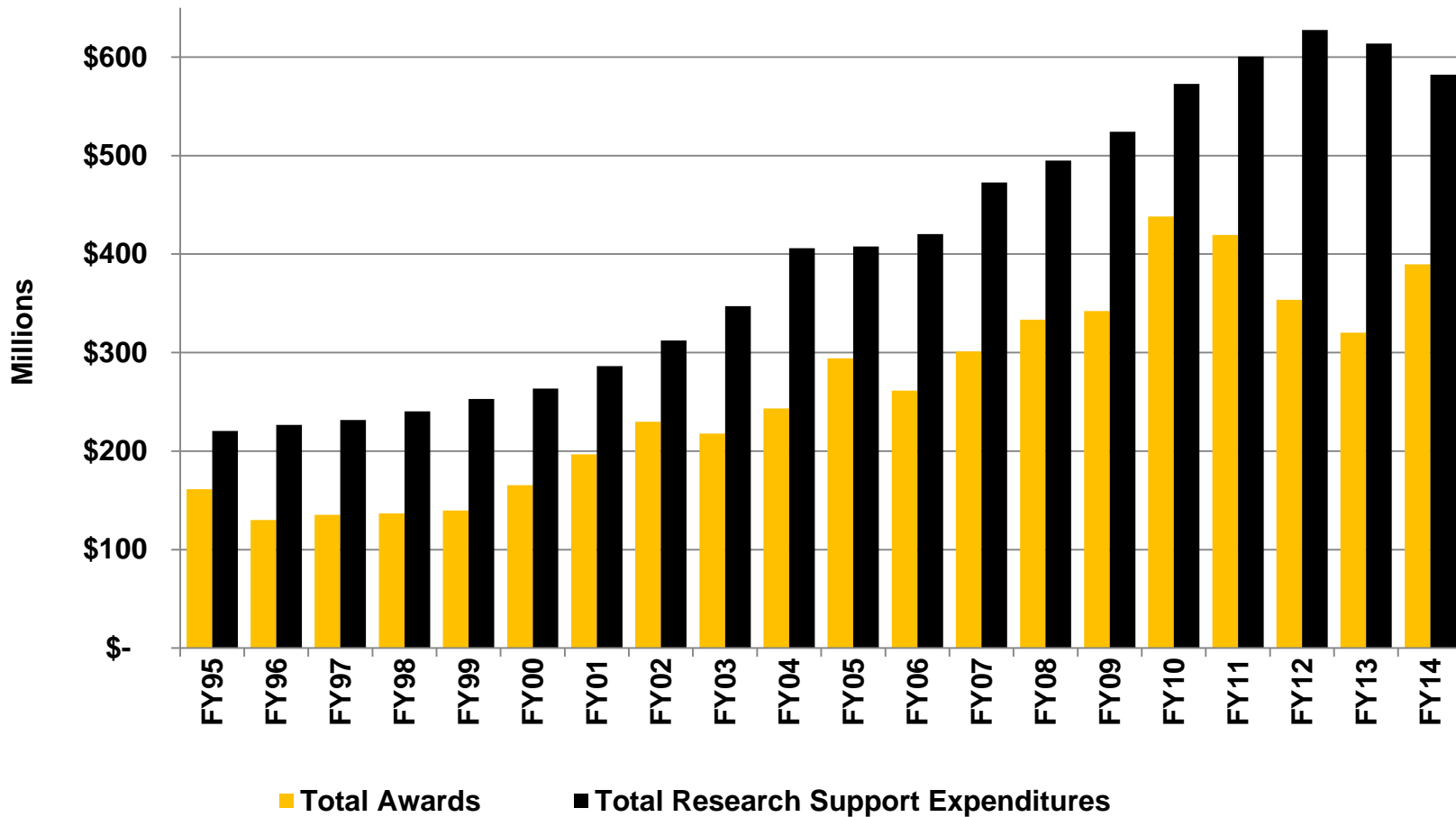
Suresh V. Garimella
Executive Vice President for
Research and Partnerships

April 21, 2015



TRENDS

Awards and Expenditures System-wide



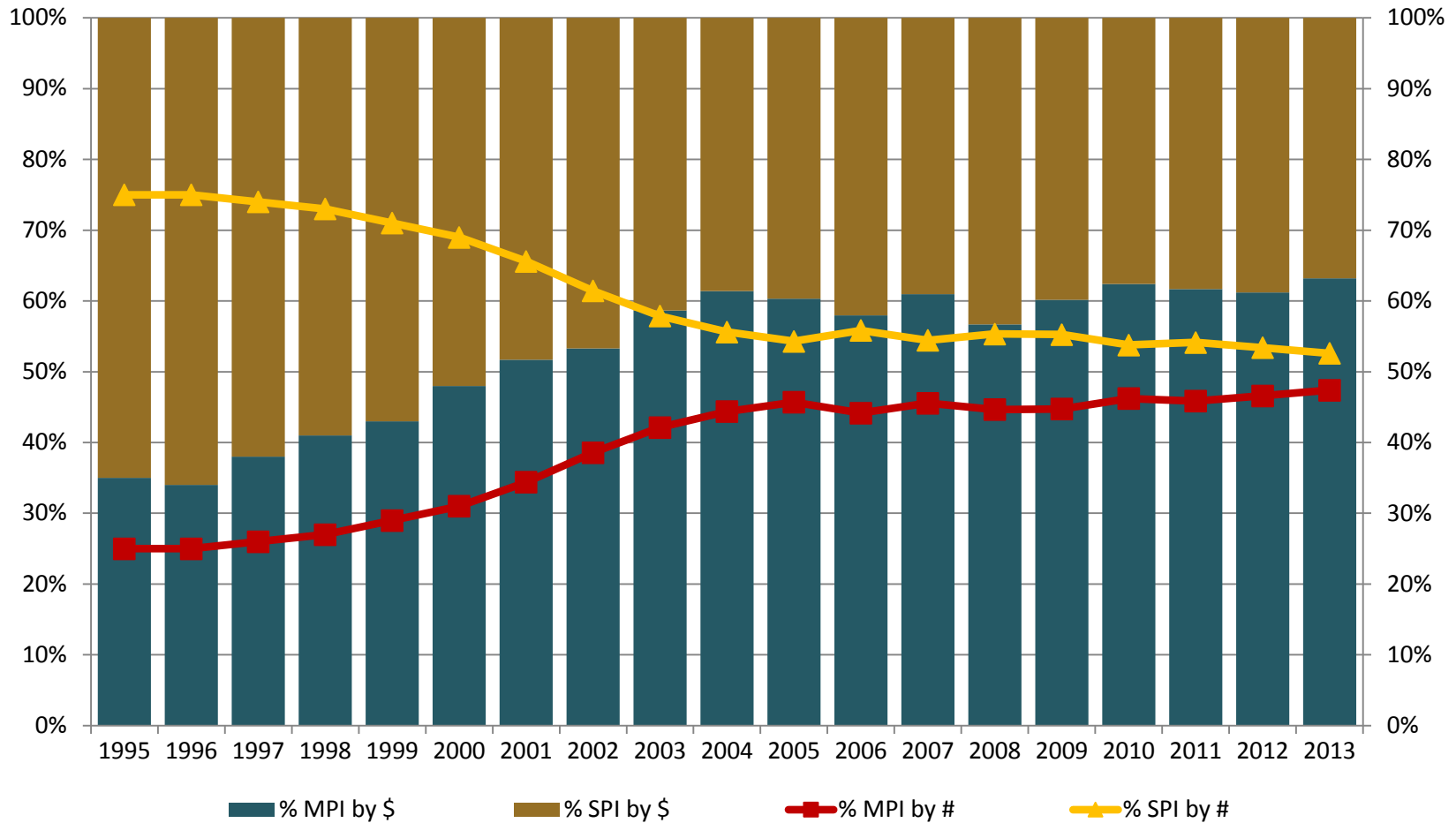
PURDUE AWARDS BY AGENCY

FY14 awards system-wide: \$389 million

5%	USDA, \$21 M
6%	DOE, \$22 M
6%	State/Local Govts, \$23 M
6%	PRF/PU, \$24 M
7%	DoD, \$27 M
11%	DHHS (NIH), \$42 M
13%	Other Fed < \$10M & Foreign Govts., \$50M
21%	NSF, \$82M
25%	Industrials & Fdns, \$98M

INTERDISCIPLINARY AWARDS

National Science Foundation Single PI vs. Multiple PI Awards



OFFICE OF RESEARCH AND PARTNERSHIPS

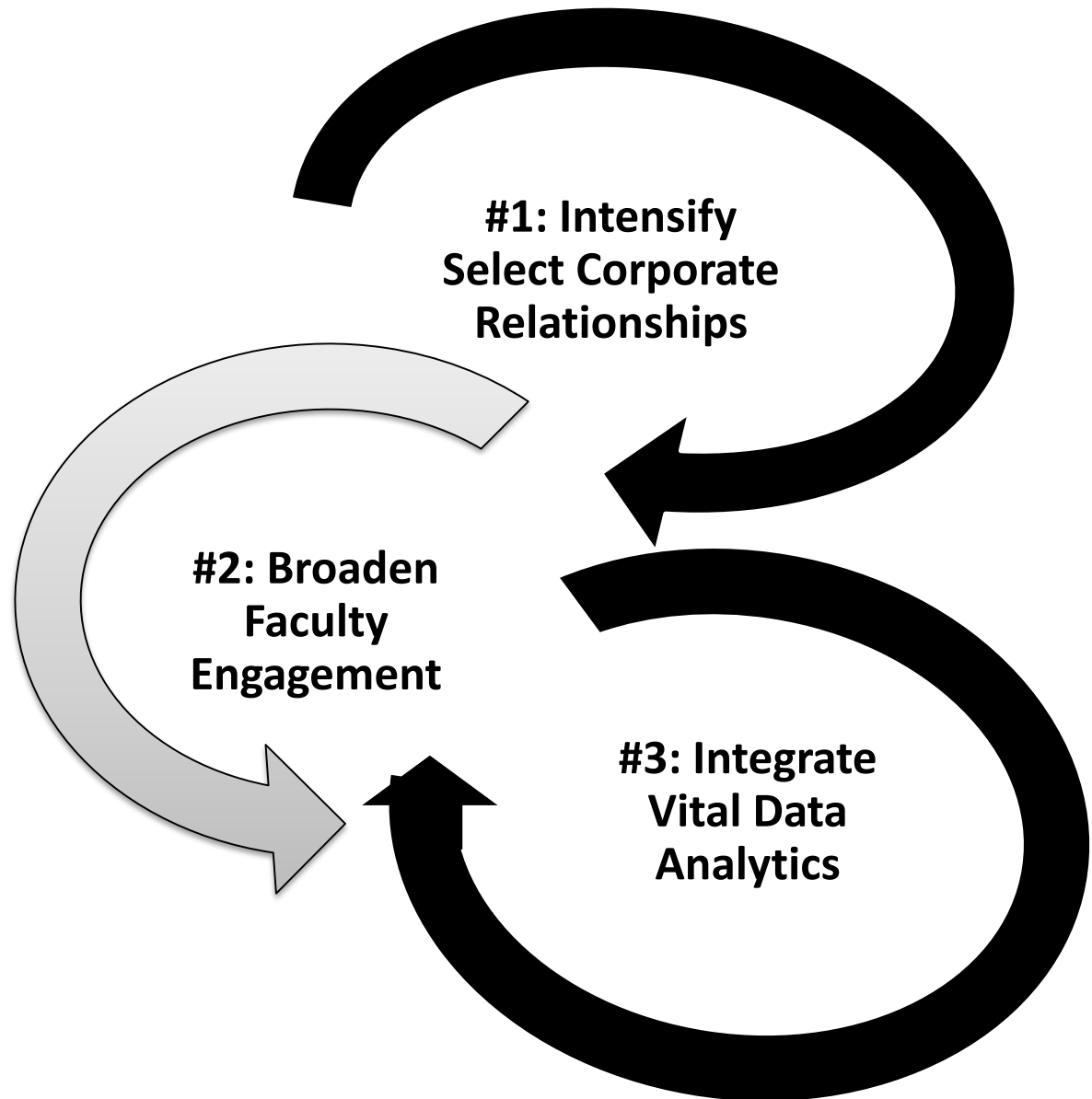
Mission: EVPRP supports faculty in their creation of new knowledge, development of exceptional research programs, and production of the most competitive research proposals possible.

- Research Development
- Corporate & Global Partnerships
- Research Compliance
- University Infrastructure
- Discovery Park

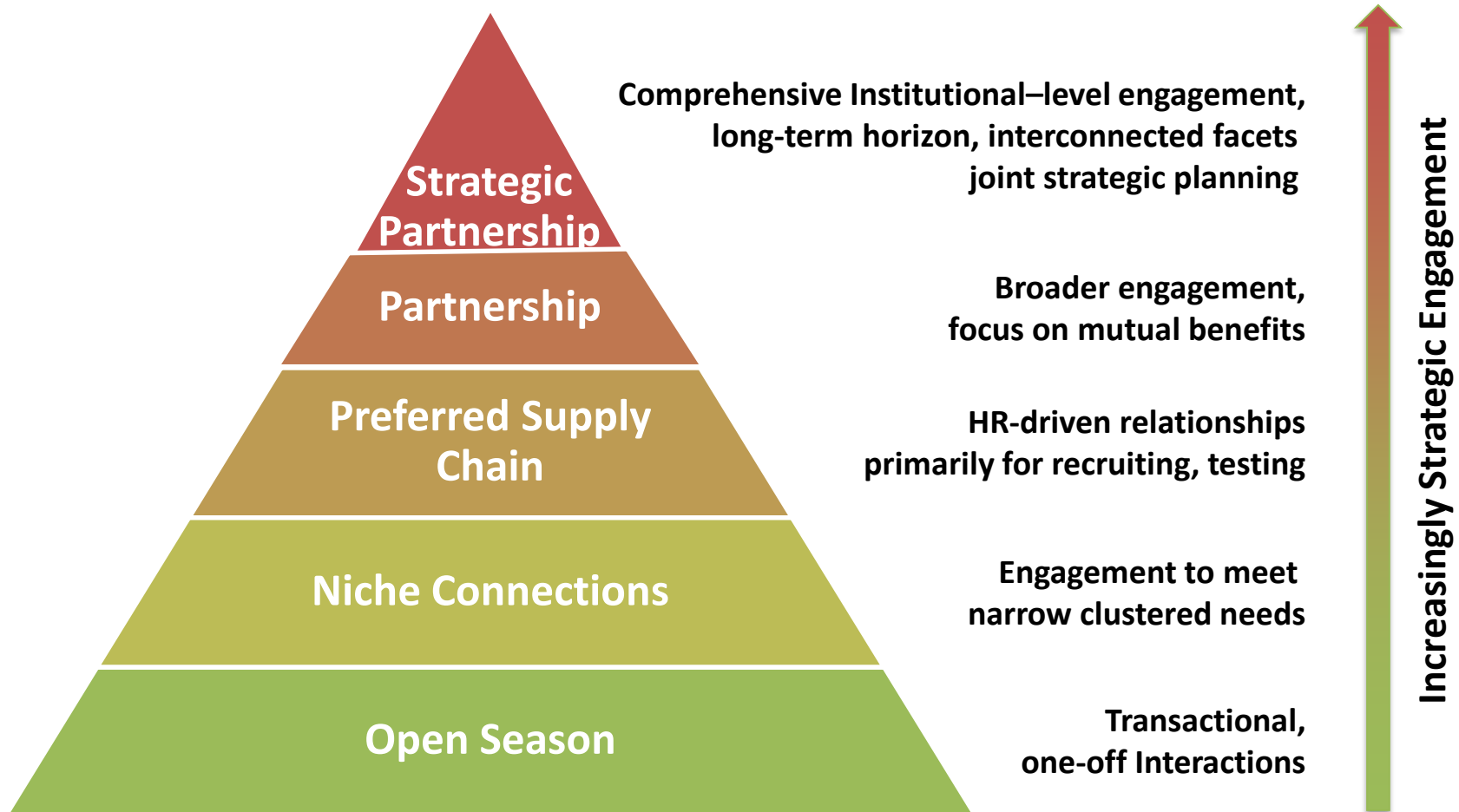


PURDUE PARTNERS

**Mission: Increase
impact,
scale and sustainability of
corporate partnerships**



INTENSIFY SELECT CORPORATE RELATIONSHIPS



SELECTED RECENT SUCCESSES

- Indiana Advanced Composites Manufacturing Institute
- GE/Purdue Partnership – Jet Engine plant attraction, and Advanced Manufacturing Center
- Strategic partnerships with selected companies such as Chrysler; a number of others to be announced soon
- Strategic alliance with Sandia National Labs
- Strategic partnership with Catholic Relief Services
- Lilly Endowment support for key campus initiatives

Seeks to catalyze interdisciplinary interactions that transcend academic boundaries of faculty, staff, and students, toward discovery with engagement and learning

- \$1bn in total investment
- 148,000 sq. ft. research laboratory space
- 107,000 sq. ft. office and support space



- Bindley Bioscience Center
- Birck Nanotechnology Center
- Burton D. Morgan Center for Entrepreneurship
- Center for Predictive Materials and Devices
- Cyber Center
- Discovery Learning Research Center
- Global Sustainability Institute
 - Center for the Environment
 - Energy Center
 - Purdue Climate Change Research Center
 - Center for Global Food Security
 - Purdue Water Community
- Oncological Sciences Center
- Purdue Center for Drug Discovery
- Purdue Center for the Science of Information
- Regenstrief Center for Healthcare Engineering

UNIVERSITY PROGRAMS

■ **Pillars of Excellence in the Life Sciences**

- an effort to coalesce faculty with synergistic research interests into identifiable and cohesive group(s) and provide significant resources to enable high national impact

■ **NIH Targeted Initiatives**

- new R01/U01/P01 Program / Competing Renewal R01 Program
- NIH Centers Program
- NIH Training Grant Program

■ **Equipment Grants**

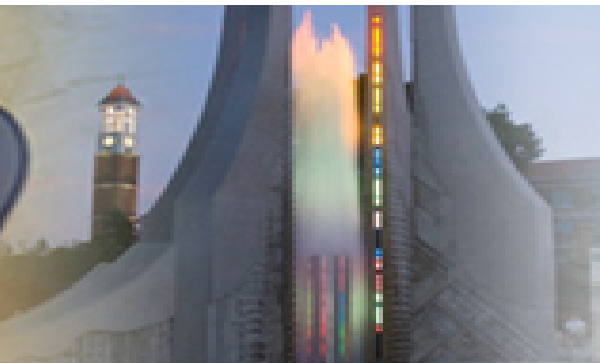
- support infrastructure needs not filled through other federal and private sources for both laboratory and non-laboratory items

■ **Research Incentive Fund (F&A return)**

- a monetary research incentive to Purdue's colleges, schools, departments and faculty related to external sponsored programs

FACULTY RECOGNITION

- **Herbert Newby McCoy Award**
- **Purdue University Research and Scholarship Distinction Award - Humanities and Social Sciences**
- **Purdue University Research and Scholarship Distinction Award - Pure or Applied Science or Engineering**



PURDUE GLOBAL VISION

Purdue University will be the benchmark institution that serves as a model for how a large, public research university can be a global university in the absence of a physical campus presence in multiple countries. We will accomplish this via key strategic partnerships with public and private sector entities around the world.

ENGAGE STUDENTS

■ Diversify and Integrate Student Body

- 9,080 students from abroad, representing 122 countries
- 837 international faculty and staff from 62 nations
- Ranked 2nd among US public schools; 3rd in nation for international student enrollment



■ Enhance Student International Experience

- low % of Purdue students study abroad
- through immersive study abroad experiences our students can fully understand issues from a world perspective, master a foreign language, and define their place in the international community

EXTERNAL PARTNERSHIPS

■ Private sector

- GE
- Rolls-Royce
- Caterpillar
- ADM
- Nanshan
- Argos
- ...

■ NGOs

- Lilly Endowment
- Mellon Foundation
- Catholic Relief Services
- Templeton Foundation
- ...

■ Institutions

- Colombia – Colciencias/Colfuturo
- Costa Rica
- AUM
- Mexico – CONACyT
- ...

■ Government

- USAID
- USDA
- Navy
- Missile Defense Agency
- Coast Guard
- Colombia
- ...

■ Alumni/friends

- Study Abroad Big Move
- Policy Scholars
- ...

■ Colombia office

- Fiscal Agency through Purdue International, Inc.
- LATeRAL model for partnerships

PURDUE INTERNATIONAL, INC.

- Flagship for Purdue Global Affairs Programs
- Nonprofit 501(c)(3) supporting organization
- Non-Governmental Organization (“NGO”) status



GLOBAL ACADEMIC COUNCIL

- **Associate Deans for Global Programs**
- **Global Resource Committee**

Purpose:

Provide recommendations and feedback to Purdue leadership and to the campus community on:

- The academic merit, the potential impact and the risk/benefit characteristics of new and ongoing global partnerships and programs
- Global trends as they affect Purdue's worldwide activities and profile, and
- Collaborative development of strategic campus-wide global initiatives

QUESTIONS ?





GLOBAL SUPPORT AND PURDUE INTERNATIONAL, INC. OVERVIEW

Research Hot Topics
April 21, 2015

GLOBAL SUPPORT MODEL

Acronyms:
 BOT: Board of Trustees
 EVPRP: Executive Vice President for Research and Partnerships
 CFO: Chief Financial Officer and Treasurer
 CCGPO: Chief Corporate and Global Partnerships Officer
 GAC: Global Academic Council (roster on reverse)
 GRC: Global Resource Committee (roster on reverse)
 GSS: Global Support Specialist
 Support Offices (see list on reverse)



GLOBAL SUPPORT MODEL

Global Academic Council Membership

Chief Corporate and Global Partnerships
Officer: Dan Hirleman (Chair)
College of Pharmacy: Eric Barker
College of Health and Human
Sciences: Liping Cai
College of Technology: Robert Cox
Krannert School of Management: Greg
Hundley
College of Education: Carla Johnson
College of Agriculture: Jess Lowenberg-
DeBoer
College of Liberal Arts: Song No
College of Engineering: Arvind Raman
Discovery Park: Al Rebar
College of Veterinary Medicine: Will Smith
College of Science: Elizabeth Taparowsky

Ex officio:

Faculty Coordinator for Institutional
Partnerships: David Janes
Global Support Specialist: Trent Watkins

Global Resource Committee Membership

Business Managers: Chris Martin (co-sponsor)
Comptroller: Kendra Cooks (co-sponsor)
Human Resources: Pam Nesbitt (co-sponsor)
Treasury: Denise Laussade/Terri Mimms
Risk Management: Mark Kebert
Payroll Services: Linda Baer
Procurement: OPEN
Sponsored Programs: Ken Sandel/Beth Siple
Managerial Accounting: Kim Hoebel
Accounting Services: Kathy Thomason
General Counsel: Steve Schultz/Abby Daniels
Internal Audit: Peg Fish
IPFW: OPEN
Purdue Calumet (Purdue Northwest): OPEN
Global Support Specialist: Trent Watkins
Business Office CCGPO: Christy Haddock

Ex officio:

Chief Corporate and Global Partnerships
Officer: Dan Hirleman

Support Offices

Business Managers
Comptroller
Human Resources
Treasury
Risk Management
Payroll Services
Procurement
Contracting
Sponsored Programs
Managerial Accounting
Accounting Services
General Counsel
Export Control
International Programs
Tax
Et al.

FOREIGN LEGAL STATUS REQUIREMENT

Common indicators of significant overseas operation:

- Opening foreign business bank account
- Hiring local citizens
- Opening an office in a foreign country
- Having employees present in country for more than 183 days (need not be contiguous)
- Leasing buildings or land

STEPS:

- **Faculty Member/Program Director works with his/her Business Office, Department Head, Dean and college global representative to formulate a strategic plan/business case for a new or expanded program that entails significant operations in a foreign country**
- **Business Office and Faculty Member/Program Director sends the high level vision with as many situational details as possible to the Global Support Specialist**
- **The Global Support Specialist will act as the liaison for the Department with the Support Offices, Global Resource Committee, Global Academic Council and external consultants to provide guidance and support for the program**

PURDUE INTERNATIONAL, INC.

Nonprofit 501(c)(3) supporting organization

- Resulted from the reorganization of longstanding affiliated foundation
- Wholly-controlled by Purdue University

Vehicle for Purdue global partnerships & programs

- Dedicated to facilitating Purdue's international education, research and exchange activities

WHAT PII OFFERS:

Status as a Non-Governmental Organization (NGO)

- Offers ability to establish in country legal status as an entity recognized by a foreign government when setting up education, research and exchange activities
- Avoids obstacles typically faced by the University as a 'governmental organization'

QUESTIONS?

**Office of Comptroller
Global Support Resources/
Purdue International**

globalservices@purdue.edu

765-494-7536



UNIFORM GUIDANCE UPDATE

Ken Sandel

Senior Director

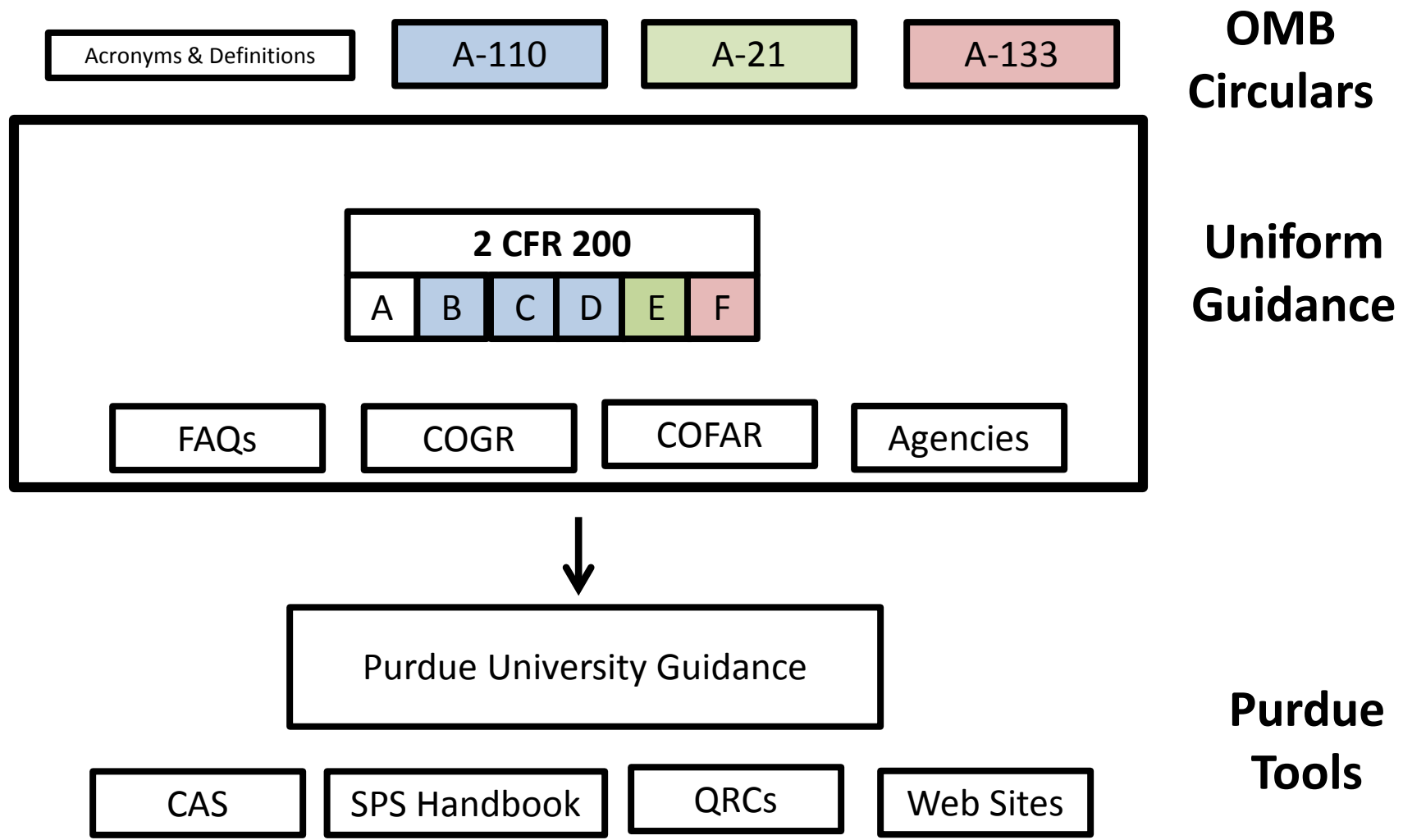
Sponsored Program Services



WHAT IS UNIFORM GUIDANCE?

- Biggest change in Federal regulations in 50 years
 - President's directive to streamline and ease administrative burden and strengthen oversight
 - 8 OMB Circulars A-21, A-110 & A-133 - Consolidated into 1
 - More lenient and less prescriptive rules
 - Greater emphasis on internal controls
 - Still True
 - Allowable
 - Necessary
 - Reasonable
 - Consistently Treated
 - Properly Allocated
- } Creates degree of uncertainty

GUIDANCE – BEFORE AND AFTER



NEXT STEPS

- Updates to documentation/policy and procedural reviews
- Web site updates/maintenance
<http://www.purdue.edu/business/sps/UG/index.html>
- Continue to monitor - COGR, COFAR, FDP & OMB
- Communication & Training

IMPLEMENTATION

[HTTP://WWW.PURDUE.EDU/BUSINESS/SP/UG/IMPLEMENT.HTML](http://www.purdue.edu/business/sp/ug/IMPLEMENT.HTML)

IMPLEMENTATION DATE

The Administrative Requirements and Cost Principles detailed within the Uniform Guidance will apply to new and incrementally funded awards effective December 26, 2014. The Audit Requirements detailed within the Uniform Guidance will apply to audits of fiscal years beginning on or after December 26, 2014. For Purdue, that is July 1, 2015. While the opportunity is available to separately track old and new funds under separate guidelines, we have decided to adopt the Uniform Guidance requirements for all existing awards as of Dec. 26, 2014, except for procurement requirements, participant support costs and agency-specific terms and conditions present in existing awards.

EXCEPTIONS

Participant Support Costs

- New guidance for participant support cost budget lines detailed in 2 CFR 200.456 will be applied to new and incrementally funded awards effective December 26, 2014. Budget lines will be established in separate internal orders excluded from the F&A base. Awards made prior to December 26, 2014 will remain subject to regulations cited in their grant specific award documents and continue to be charged F&A as currently established.

Procurement

- Purdue University has delayed the implementation of the new Uniform Guidance Procurement Rules detailed in 2 CFR 200.317 - 200.326 until no later than July 1, 2016 as provided by the waiver of the procurement rules (see COFAR FAQ, Section 110-6 released November 26, 2014). In the interim, OMB circular A-110 will be followed on all existing awards. For additional information, please visit: <http://www.purdue.edu/business/procurement/index.html>.

Agency-Specific Terms and Conditions

- Agency-specific terms and conditions which provide more explicit guidance on administrative requirements, cost principles and audit requirements will be followed when detailed on existing awards.

UPDATES TO DOCUMENTATION

INVENTORY OF GUIDELINES, POLICIES, PROCEDURES, AND QRS (GOAL 5/31/15)

- SPS Handbook
- Cost Accounting Standards
- Recharge Center Policy and Procedure Manual
- Purchasing Policy
- Cost Sharing Guidelines
- Sub-Recipient Monitoring Guidelines
- Correcting Document Guide
- Prior Approval Guidelines
- Effort Reporting QRS
- Cost Allocation Guidelines
- Record Retention Guidelines
- Status of Updates:

Pending	5
In-Process	26
Updated	27
Extension	13
No Changes	22
Total	93

COMPENSATION – TERMINAL LEAVE

[HTTP://WWW.PURDUE.EDU/BUSINESS/SPS/UG/CHANGES/COMPENSATION.HTML](http://www.purdue.edu/business/sp/ug/changes/compensation.html)

DESCRIPTION

- If a non-Federal entity is on cash basis of accounting for the cost of leave (recognized in the period that the leave is taken and paid for)
- Then payments for unused leave when an employee retires or terminates are allowable as direct costs in the year of payment

ACTION PLAN

- No additional action is needed

STATUS

- Due to the technical correction issued by the Office of Management and Budget (OMB), Purdue can continue to direct charge terminal leave according to current practice

PARTICIPANT SUPPORT COSTS

[HTTP://WWW.PURDUE.EDU/BUSINESS/SP/UG/CHANGES/PART_SUPP_COST.HTML](http://www.purdue.edu/business/sp/ug/changes/part_supp_cost.html)

DESCRIPTION

- Direct costs for items such as stipends, subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants (not employees) in connection with conferences, or training projects
- Now excluded from the (MTDC) base
- Must be explicitly included in the budget
- Prior approval may be needed to transfer funds into or out of the participant support cost line dependent on agency specific guidelines

ACTION PLAN

- Adjust budgeting practices for all projects
- Change the base to exclude participant support costs from the F&A base
- The need to establish separate Internal Orders (IOs) will be dependent upon the terms and conditions within each award
- Must use the appropriate GL

STATUS

- Pre-Award has made changes to COEUS
- New F&A base "P" created
- F&A base [document](#) has been updated.
- [Guidelines](#) for awards with participant support costs have been updated

FACULTY AND PI INFORMATION

[HTTP://WWW.PURDUE.EDU/BUSINESS/SPS/UG/FACULTY_INFO.HTML](http://www.purdue.edu/business/sp/ug/faculty_info.html)

FIND INFO FOR ▾

APPLY NEWS PRESIDENT SHOP VISIT GIVE EMERGENCY

PURDUE UNIVERSITY | Sponsored Program Services

Home General ▾ Directory Pre-Award ▾ Post Award ▾ Contracting ▾ Data ▾ Quality Assurance ▾ Coeus ▾ Research & Partnerships

Uniform Guidance

- Uniform Guidance Home
- Key Changes / Action Plan ▾
- Faculty/PI Information
- Resources
- Implementation
- Purdue Committee
- Contact Us

Faculty(PI) Information

[Faculty Guide to the Uniform Guidance \(UG\)](#)

[Uniform Guidance Implementation](#) - 20 minute Narrated PowerPoint

Employee Portal
Blackboard
Purdue Today
myMail
Outlook
myPurdue

Faculty and Staff
AIS
Physical Facilities
Directory
Campus Map
Construction

WE ARE PURDUE
WHAT WE MAKE MOVES THE WORLD FORWARD



Business@Purdue
Business@Purdue News
NDAA Whistleblower Notice
Human Resources
Public Safety
Timely Warnings

Contact Us
Training
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SPS Use Only
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A-Z Index

Purdue University, 610 Purdue Mall, West Lafayette, IN 47907, (765) 494-4600

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UNIFORM GUIDANCE

FOR PRINCIPAL INVESTIGATORS/FACULTY

FIND INFO FOR ▾

APPLY NEWS PRESIDENT SHOP VISIT GIVE EME



Sponsored Program Services

Home Pre-Award Post Award ▾ Contracting ▾ Data ▾ General Coeus Directory Research & Partnerships Research Foundation

Uniform Guidance

Uniform Guidance Home

Key Changes / Action Plan ▶

Faculty/PI Information

Resources

Implementation Date

Purdue Committee

Contact Us

Uniform Guidance Implementation

The video player displays an aerial view of the Purdue University campus. A large 'Play' button is centered over the image. In the top right corner of the video frame, there is a 'Captions' button. Below the video frame, a white banner contains the text 'UNIFORM GUIDANCE IMPLEMENTATION' in large, bold, black letters. To the right of this banner, the name 'Ken Sandel' is listed, followed by his title 'Senior Director' and 'Sponsored Program Services'. At the bottom of the video player, a progress bar shows the video is at 00:00 of a 20:36 duration. There are also volume and Kaltura logos at the bottom right of the player.

Employee Portal
Blackboard
Purdue Today

Faculty and Staff
AIS
Physical Facilities

WE ARE PURDUE
WHAT WE MAKE MOVES THE WORLD FORWARD

Business@Purdue
Business@Purdue News
NDAA Whistleblower Notice

Contact Us
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Links

MONITORING COGR, COFAR, FDP, OMB

OMB – JANUARY 16, 2015 – BACKGROUND AND TECHNICAL CORRECTIONS

COGR Summary of Background and Technical Corrections to the OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

January 16, 2015

The Interim Joint Final Rule implementing the Uniform Guidance is available in the Federal Register (Vol. 79, No. 244, Friday, December 19, 2014): <http://www.gpo.gov/fdsys/pkg/FR-2014-12-19/pdf/2014-28627.pdf>

It is effective for new awards and for selected funding increments, issued on or after December 26, 2014. The 240-page Federal Register Notice is structured with background comments at the beginning followed by a listing of the technical corrections (pages 75879 through 75889). The Uniform Guidance, itself, will be updated to reflect the technical corrections at 2 CFR 200. The bulk and the remainder of the Federal Register Notice is a posting of each Agency's Implementation plan.

This COGR document is designed as a summary of key sections on the Background and Technical Corrections to the Uniform Guidance (UG). Note, Audit Requirements are not addressed in this document. In the sections that follow, the COGR comments are shown in **bold/italic** and are not indented and the exact language from the Federal Register Notice is shown as indented and unformatted text. **Certain sections from the Federal Register Notice are highlighted for emphasis.**

1. COGR: The following announces implementation of the Uniform Guidance. Pay special attention to the documentation expectation if your institution elects to delay implementation of the Procurement Standards (also see 12.COGR).

SUMMARY: This joint Interim Final Rule implements for all Federal awardmaking agencies the final guidance Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) published by the Office of Management and Budget (OMB) on December 26, 2013. This rule is necessary in order to incorporate into regulation and thus bring into effect the Uniform Guidance as required by OMB.

DATES: Effective date: This Interim Final Rule is effective on December 26, 2014 ...

Implementation date: ... For non-Federal entities that are nonprofit organizations or institutions of higher education (IHEs), there is a one-year grace period for implementation of the procurement standards in 2 CFR 200.317 through 200.326. As will be detailed in the 2015 OMB Compliance Supplement, **non-Federal entities choosing to delay implementation for the procurement standards will need to specify in their documented policies and procedures that they continue to comply with OMB circular A-110 for one additional fiscal year which begins after December 26, 2014.**

2. COGR: We will comment in a Response Letter on selected topics. We will provide updates on the status of the Response Letter.

Comment date: To be assured of consideration, comments must be received by OMB electronically through www.regulations.gov no later than midnight Eastern Standard Time (E.S.T.) on February 17, 2015.

ADDRESSES: Comments should be submitted to www.regulations.gov.

FOR FURTHER INFORMATION CONTACT: For general information, please contact Victoria Collin or Gil Trott at the OMB Office of Federal Financial Management, 175 17th St. NW., Washington, DC 20500, or via telephone at (202) 395-3993. You may submit comments via the Federal eRulemaking Portal at

- **Non-federal entities choosing to delay implementation for procurement standards will need to specify in their documented policies and procedures that they will continue to comply with A-110**
<http://www.purdue.edu/business/sps/UG/implement.html>
<http://www.purdue.edu/business/procurement/index.html>
- **The definition of MTDC modified to clearly state the exclusion is applicable to the first \$25,000 of a subaward and is not applicable to subcontracts/vendor agreements**
- **Fixed amount awards – The federal awarding agency or pass-through entity may use fixed amount if the project scope is specific and if adequate cost, historical, or unit pricing data is available to establish a fixed amount award based on a reasonable estimate of actual cost**

MONITORING COGR, COFAR, FDP, OMB

OMB – JANUARY 16, 2015 – BACKGROUND AND TECHNICAL CORRECTIONS

- **Direct Cost Allocation Principle** – If a cost benefits two or more projects...in proportions that can be determined without undue effort or cost, the cost must be allocated to the projects based on the proportional benefit
- **Fringe Benefits** – When a non-federal entity uses the cash basis of accounting, the cost of leave is recognized in the period that the leave is taken and paid for. Payment for unused leave when an employee retires or terminates employment are allowable in the year of payment.
- **Cost increases for fluctuations in exchange rates**...prior approval...is required only when...additional funds needed...or...the need to significantly reduce scope of the project
- **Purchased materials and supplies** must be charged at their actual prices, net of applicable credits. Withdrawals from general stores or stockrooms must be charged at their actual net costs under any recognized method of pricing inventory withdrawals, consistently applied
- **Recruitment** – Where relocation costs incurred incident to recruitment of a new employee have been funded in whole or in part to a federal award, and the newly hired employee resigns for reasons within the employee's control within 12 months after hire, the non-federal entity will be required to refund or credit the federal share of such relocation costs to the Federal Government

MONITORING COGR, COFAR, FDP, OMB

COGR LETTER TO OMB - 2/15/15 ON UNIFORM GUIDANCE PRINCIPLES

COGR

an organization of research universities

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COUNCIL ON GOVERNMENTAL RELATIONS

1200 New York Avenue, N.W., Suite 750, Washington, D.C. 20005
(202) 289-6655 / (202) 289-6698 (FAX)

February 13, 2015

Mr. David Mader
Controller
White House Office of Management and Budget
725 17th Street, NW
Washington, DC 20503

Subject: Federal Awarding Agency Regulatory Implementation of
Office of Management and Budget's Uniform Administrative
Requirements, Cost Principles, and Audit Requirements for
Federal Awards (2 CFR part 200)

Docket Number OMB-2015-0001 (formerly OMB-2014-0006)
Federal Register, Vol. 79, No. 244 – December 19, 2014

Dear Mr. Mader:

On behalf of the Council on Governmental Relations (COGR) and its members, we appreciate the hard work that many Federal leaders have contributed to the development and implementation of the OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR part 200). This letter is the COGR Response to Docket Number OMB-2014-0006.

This is an unprecedented and impressive undertaking by OMB and the Council on Financial Assistance Reform (COFAR). OMB and the COFAR have utilized a process that has allowed all stakeholders to participate in crafting the final version of the Uniform Guidance. A significant portion of the final version of the Uniform Guidance reflects the transparent and responsive approach taken by OMB and COFAR. Consequently, COGR believes that OMB and the COFAR are on the right path toward achieving the President's goal of instituting grants reform and reducing administrative burden.

However, there are several items that we believe require common-sense modification in order to ensure the best implementation of the Uniform Guidance. In this letter we highlight those items that require policy calibration and we urge OMB to take a proactive approach to addressing these items prior to full implementation. Resolving these items in a timely manner will allow for a successful roll-out of the Uniform Guidance and further elevate the overall, excellent work completed by OMB and the COFAR over the past four years.

1. Conflict of Interest (200.112)
2. Requirements for pass-through entities (200-331)
3. Procurement Standards (200.317-326)
4. Closeout (200.343)
5. DS-2 Requirement (200.419)
6. Compensation – fringe benefits (200.431)
7. Utility cost adjustment (Appendix III)
8. OMB Leadership and Advancing the Partnership

MONITORING COGR, COFAR, FDP, OMB

COGR LETTER TO OMB - 2/15/15 ON UNIFORM GUIDANCE PRINCIPLES - OMB RESPONSE

COGR LETTER

1. **COI** - Confirm it applies to procurement not sub-recipients
2. **Pass-through entity** - Allow “Safe Harbor” for recipients with single audits
3. **Procurement** – add research/scientific reason for sole source and increase micro-purchase to \$10,000
4. **Closeout** – establish 120-day closeout requirement for all agencies
5. **DS-2 Requirement** – clarify and facilitate approvals
6. **Compensation**- confirm tuition reimbursement allowability for undergraduates and graduate employees
7. **Utility cost adjustment** – more fair and equitable
8. **Inconsistencies** of effective dates



OMB RESPONSE

1. **COI** – COFAR reviewing and plans to provide future clarification
2. **Pass-through entity** – COFAR and OMB interested in advancing discussion
3. **Procurement** – COFAR is interested in additional metrics and data. FDP will coordinate data and information
4. **Closeout** – COFAR reviewing Congress mandate and interested in engaging
5. **DS-2 Requirement** – COFAR to issues guidance to ensure compliance
6. **Compensation** – COFAR will revisit based on COGRs urging and issue an update soon
7. **Utility cost adjustment** – COFAR agreeable and provided some clarity
8. **Institutional defined effective date...**is most practical and compliant manner to transition

COMMUNICATION & TRAINING

LIFE CYCLE ACCOUNT TRAINING

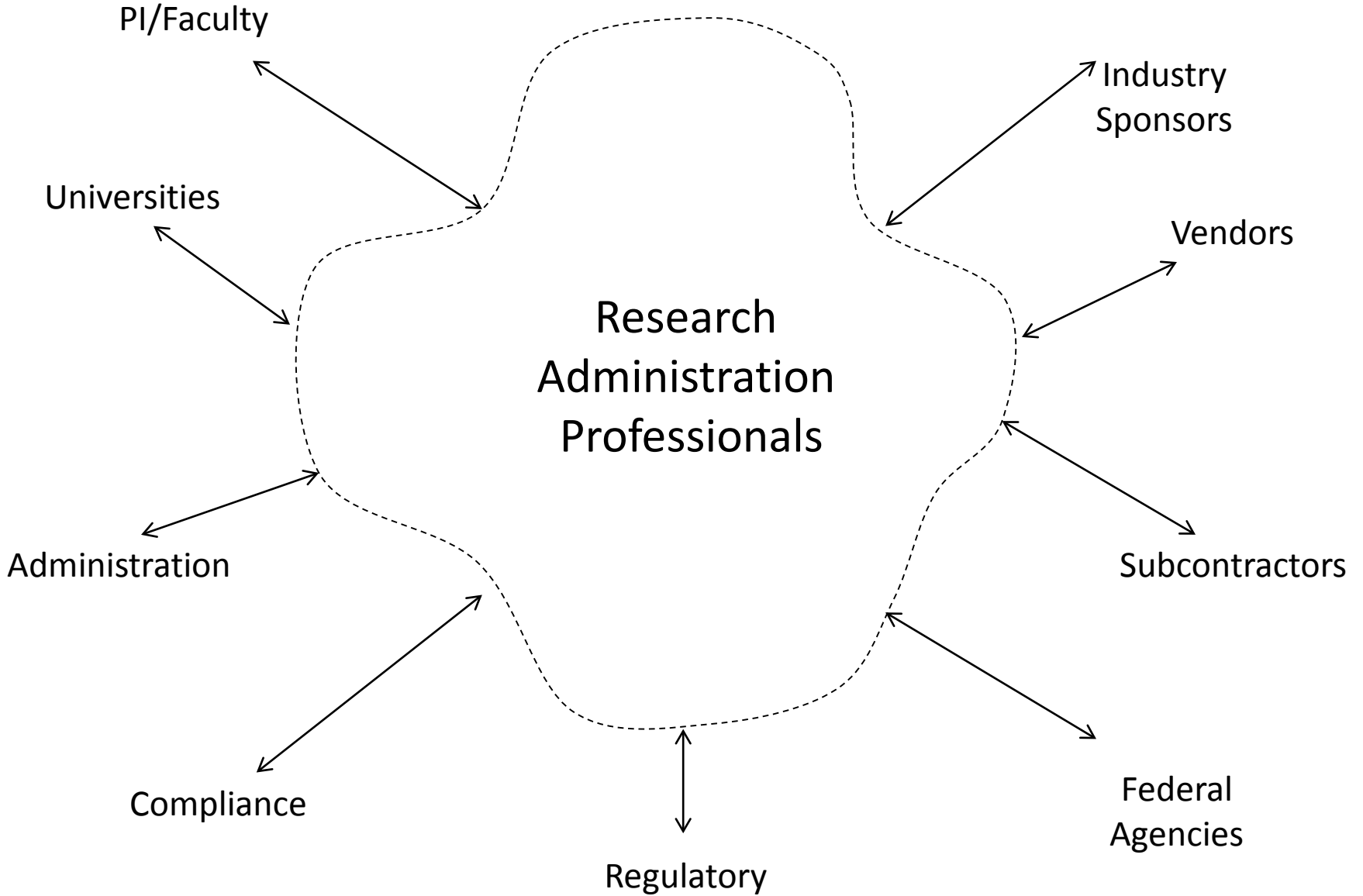
Under Review

- **BLCA 200 – Cost Principles for Educational Institutions**
Create online course for newer staff
Use Instructor-led for experienced staff (case studies & learning through scenarios)
- **BLCA 220 – Principles of Fund Establishment**
Newer employees - Funds Management Series, PARS training, current Payroll training
Possibly combine with Account Management Day to Day Tasks
- **BLCA 240 – Account Management Day to Day Tasks**
Newer employees - Funds Management Series, PARS training, current Payroll training
Use Instructor-led for experienced staff (case studies & learning through scenarios)
- **BLCA 250 – Signature Delegation**
Create online course for newer staff – focus on why we do what we do
Use Instructor-led for experienced staff (case studies & learning through scenarios)
Annual “Certification” WebCert
- **BLCA 270 – Cost Sharing**
Instructor led 1) beginner class and 2) advanced class
- **BLCA 280 – Corrections and Certifications**
Newer employees - Funds Management Series, PARS training, current Payroll training
Use Instructor-led for experienced staff (case studies & learning through scenarios)
- **BLCA 290 – Pre-Auditor Training**
Pre-Auditor Checklist course for experienced staff, required course for those holding the role
- **BLCA 320 – Closings**
On-line only

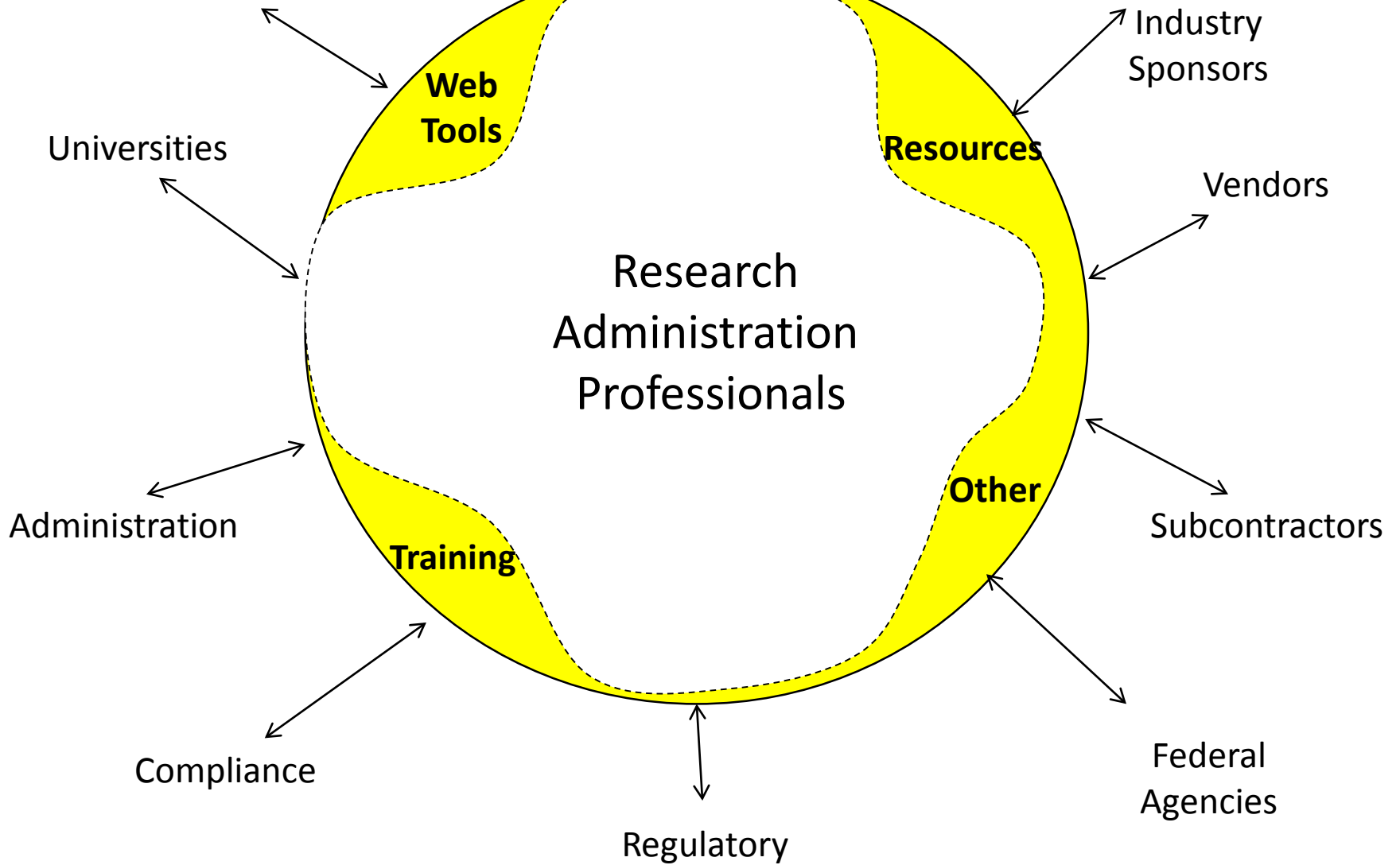
COMMUNICATION & TRAINING

RESEARCH ADMINISTRATION PROFESSIONALS

- Research Administration Professionals at Purdue University are responsible for partnering with the research community to manage nearly \$400M of research expenditures on an annual basis. Purdue University's research portfolio has grown significantly over the last ten years, and this trend is projected to continue.
- Improving post award support and services for the entire research community is an important and shared goal for Sponsor Program Services, Business Management and Comptroller organizations. This can only be achieved by our units working together and sharing information across organizational lines.
- Throughout the organization inquiries are made, questions are asked and information is sought from a variety of sources directed at staff in various research support positions. Presently the skill levels and experience of this group varies around the organization and depending on who and where you ask you may get a different answer.



Knowledge & Customer Service





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THANK YOU!

Ken Sandel

Senior Director

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