



# First Fridays

with the

# University Budget Office

# UNT<sup>®</sup>

UNIVERSITY  
OF NORTH TEXAS<sup>®</sup>

**EST. 1890**

November 1, 2019

# Agenda

- Icebreaker
- TGS Travel Grant
- Corporation & Foundation Relations
- Announcements/Reminders
- Open Forum – Q&A

Icebreaker:

Riddle:

How do you spell candy with 2 letters?

# TGS Travel Grant

# TGS Travel Grant Procedure Update

## What is the Graduate Travel Grant Program?

The Graduate School offers a limited number of competitive scholarships to selected graduate students who are in good academic standing. These travel grants are offered to support the costs of travel to professional meetings (in which they are presenting) that are relevant to their degree. The TGS award is a matching award \$100-\$500, not to exceed the actual cost of the travel.

Additional eligibility requirements can be found [here](#)

## Why are we updating the procedure?

- To comply with Title IV requirements
- To comply with IRS guidelines
- To show expense in the correct department for state reporting
- To (hopefully) alleviate confusion regarding this program and processing the payment to students

# What are some of the major changes?

- Additional structure and consistency around award cycles
- Students applying for TGS matching grant must complete TGS requirements before the end of the application window
- The funds for the awarded students will be transferred to College Dean's Office chart string
  - Chart string will include purpose code 14214
  - International Office will also transfer their funding
- Awards will be processed through Travel Accounting using new TBA/Travel Voucher form
  - Departments are responsible for collecting and keeping receipts
- Submission deadlines for students and departments
- TGS and International office will be completing audits at the end of each semester
  - Funding may be reclaimed by TGS if funds not used appropriately
  - Rolling deadline

We recommend entire award be processed as a stipend. If the student can not afford to pay for expenses upfront, out of pocket, they can reach out to the [Student Money Management Center](#)

## Changes for Students:

- Students must complete 3 Graduate Workshops before the end of the application period
- Student's RCR/CITI Certification must be current (RCR does not count towards Workshop requirement)
- Student's degree plan must be on file with TGS before the end of the application period
- Student will have entire award processed by College or Department
- Travel during the current time period given more weight (e.g. October award period will favor funding travel in September, October, or November, & December)

**New process became effective for the 2019-2020 Academic year**

# Degree Plans

 Send	From ▾	GradDegreePlans@unt.edu
	To...	
	Cc...	
Subject		Students Missing Degree Plans

Hello!

As you may already know, each month an updated list of all graduate students and their degree plan status is uploaded to the [TGS Data Hub SharePoint site link](#). In order to assist you in identifying your students who do not have an approved degree plan on file with the Toulouse Graduate School, we have filtered down the list to only students in your program(s) who do not have an approved degree plan on file with us. Please review the attached file and notify us of any students who you show as having an approved degree plan on file. *Note: If we received a degree plan within the past 2 weeks, please ignore those students.*

For the students who do not have an approved degree plan on file, please work with them to have that submitted as soon as possible. Also, please submit a change form if there are any updates to a student's existing degree plan. **These things will help avoid any issues or delays in graduation.** For your convenience, degree plans and change forms can be emailed to us at [GradDegreePlans@unt.edu](mailto:GradDegreePlans@unt.edu).

As a reminder, per the UNT Graduate Catalog: The degree plan is an official document prepared and approved in the student's major department that lists courses completed, courses to be completed, proficiency examinations and all other requirements for a particular degree program. The master's or doctoral degree plan should be prepared and approved in the department, then submitted for the graduate dean's approval during the student's first term/semester of enrollment. The degree plan is subject to the requirements of the catalog.

Please let us know if you have any questions or concerns.

Kind| regards,

*Alexis Roberson*

Student & Program Assistant

Toulouse Graduate School, ESSC 354

940.369.5813 | [Alexis.Roberson@unt.edu](mailto:Alexis.Roberson@unt.edu) | [GradDegreePlans@unt.edu](mailto:GradDegreePlans@unt.edu)



# Suggestions

- We have found students are stressed by department deadlines that encroach with our deadline causing them little time to submit to TGS
  - Please notify students a week before our deadline to allow them time to submit all requirements for our TGS award
- Once department/college awards have been decided, please send a list of the awardees to [Travel.Grants@unt.edu](mailto:Travel.Grants@unt.edu)
- Please share your department rules with your Advisors and us
  - We receive many calls from departments asking about department specific protocol and we don't want to give out incorrect information
- Please respect the uniformity required for the TGS travel grant program criteria
  - We are trying to create a uniform and fair award program for multiple academic disciplines. We understand each college is unique.

## Next Steps

- Earlier this week, a list of student winners was sent to each College's AFO or alternate contacts, if known.
  - Each list shows the amount that will be transferred to each College and a due date for reconciliation information based on the last student's travel dates

## Looking Forward

- Short term: We have found some areas in our process that we can improve and strive to be better in the next round.
- Long term: We are working with ITSS on a Dynamic Form to collect information. The hope is it can be a template shared with each College for their Travel Grant Award program.

Questions?

E-mail: [Travel.Grants@unt.edu](mailto:Travel.Grants@unt.edu)

# Corporate & Foundation Relations



# CFR Activity by the Numbers

## Proposals Submitted: FY 19 vs FY 18

Range	# of Proposals		\$ Asked	
	FY 2018	FY 2019	FY 2018	FY 2019
\$1 Million and Over	1	8	\$18M	\$11M
\$500,000 to \$999,999	8	2	\$5M	\$1M
\$250,000 to \$499,999	8	8	\$3M	\$2M
\$100,000 to \$249,999	11	25	\$1M	\$4M
\$25,000 to \$99,999	31	43	\$1M	\$2M
Below \$25,000	29	37	\$301K	\$428K
<b>Grand Total</b>	<b>88</b>	<b>123</b>	<b>\$28M</b>	<b>\$20M</b>

*Data is 9/1/18 – 8/28/19.*

**\$9.1M**

**FY 19 Corporate & Foundation  
Giving**  
*(\$9.3M in FY 18)*

**Asks Doubled**

**# Proposals increased 42%  
and \$ asked doubled from  
\$10M to \$20M**  
*(excluding 1 \$18M ask in FY18)*

**13**

TRIP  
Submissions



**\$12.1M**

Future TRIP  
Matching \$



**15**  
new companies  
moved from none  
to substantial  
engagement



**27**  
CFR visits  
hosted on  
campus



**98**  
Stewardship  
meetings &  
reports  
completed



**200+**  
Funding  
opportunities shared  
with faculty & staff

**EST. 1890**

**UNT<sup>®</sup>**

**EST. 1890**

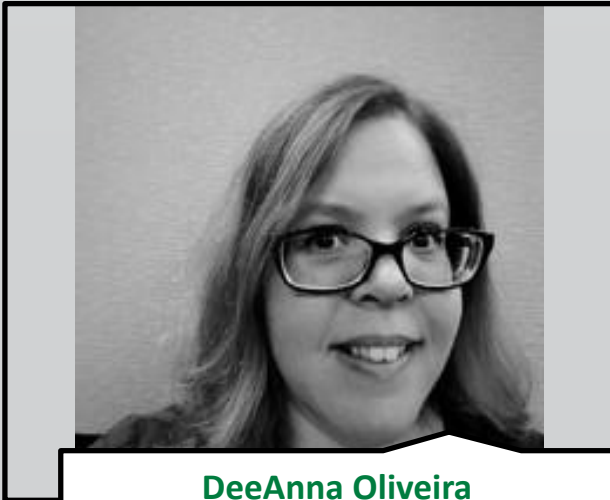
# Meet the Corporate & Foundation Relations Team



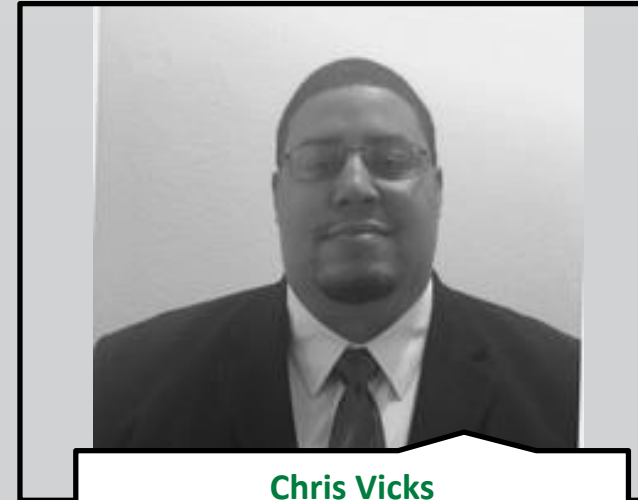
**Jessica Watts**  
Executive Director, Corp  
& Fdtn Relations



**Brittany Causey**  
Sr. Director, Corp & Fdtn Relations



**DeeAnna Oliveira**  
Director, Corp & Fdtn  
Communications



**Chris Vicks**  
Coordinator, Corp & Fdnt  
Relations



# Philanthropic Grants Explained

## Philanthropic Grants

- are cash or in-kind gifts from a foundation, corporation, or other non-government organization, gifted in order to achieve a **charitable purpose**.

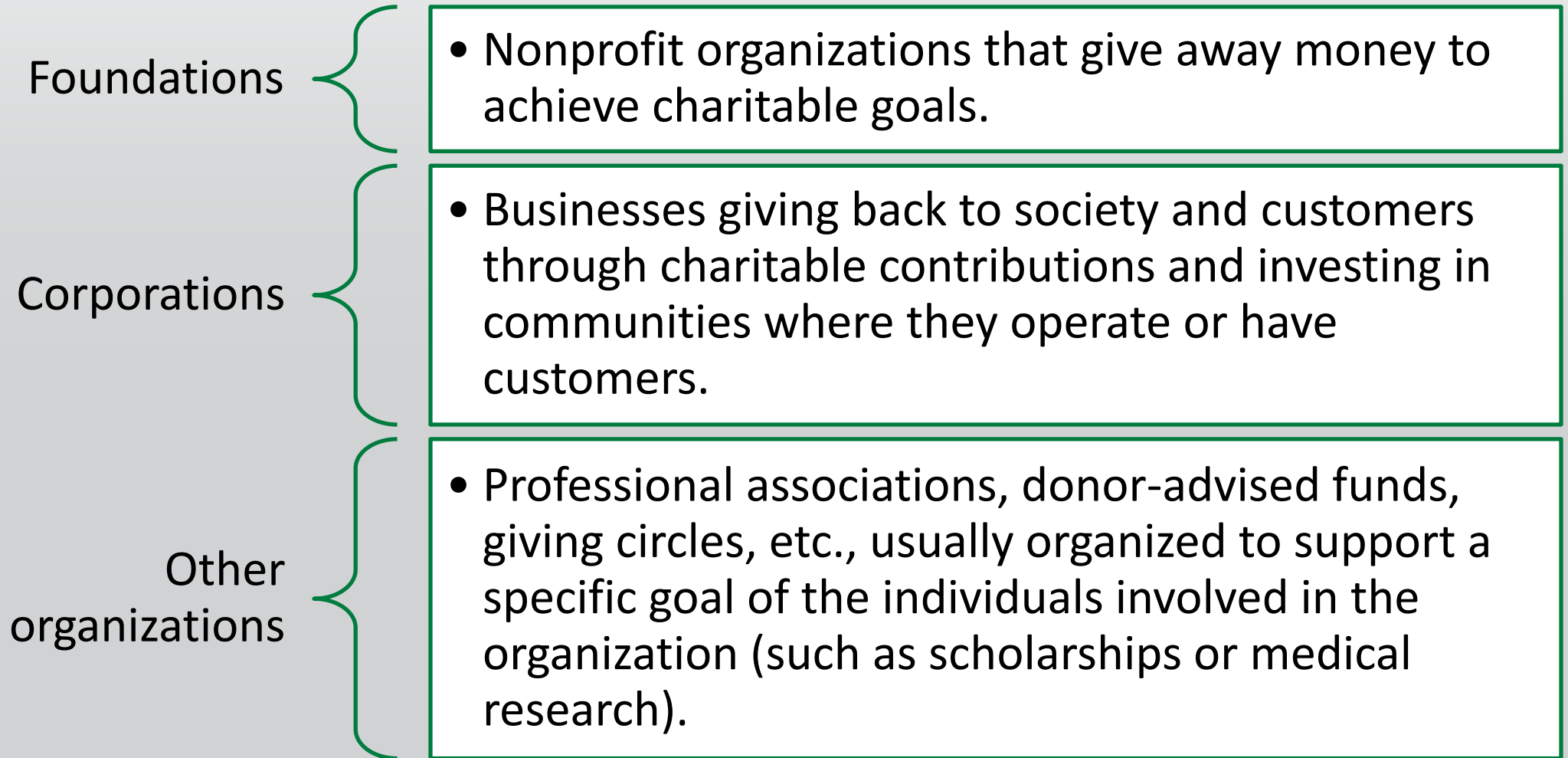
## Similar to a gift

- Like private gifts from individuals, people who give them are motivated to improve the world (charitable purpose); they count as part of a foundation's "payout" or as a tax deduction for a corporation.

## Similar to government grants

- They typically have clear purposes, budgets, and timelines

# Who Makes Philanthropic Grants?



## Partnership with Office of Grants & Contracts

- Working collaboratively for about 1 ½ years, and will continue!
- Meet monthly to discuss proposals and recently funded gifts/grants
- Communicate while working on many proposals
- Communicate while working on many awards



## Frequently Asked Questions

### **What if a foundation makes a “grant”?**

According to the IRS, the agreement with a private foundation that documents a charitable contribution may use the term “grant” instead of “gift.”

Funds that a foundation calls a “grant” may or may not be managed as a sponsored project.

The term “grant” does not necessarily mean the support is a sponsored project or should be managed by OGCA.

# Frequently Asked Questions

## What's a “clawback phrase”?

- The contribution, once made, must be irrevocable for all donors except private foundations, who are allowed to include a clawback provision in their agreements under IRS regulations.
- UNT may be required to return unexpended funds or negotiate a re-allocation of unexpended funds.
- This phrase is common in foundation gift agreements and in rare cases may be acted upon.
- The CFR Office works closely with faculty and staff to ensure we spend the funds appropriately, report on the use of funds, so we avoid any of the rare instances where this clause may be acted upon.

# Frequently Asked Questions

## **What if the funds are coming through the UNT Foundation?**

Some gifts and grant need to be made to a 501c3, which is when they are given through the UNT Foundation.

Money given through the UNT Foundation can be deposited into funds managed in OGCA or funds that will be held in a Chartstring at UNT.

CFR will manage communication with the UNT Foundation.

When, you request a new Chartstring, the “foundation acct number” box will be blank if the gift is expendable.

Essentially, the UNT Foundation passes the money from the funder to UNT and does not create a UNT Foundation account.

## Frequently Asked Questions

### **Why does CFR need a new Chartstring or one with unique purpose and program codes?**

Some foundations require high-level financial reporting.

It would be impossible to determine if funds were spent for a specific purpose if they were comingled with other departmental funds.

Creating a new chart string allows us to accurately track spending levels and uses, and avoid issues that may arise.

If you ever have questions about a  
company or foundation gift, please  
ask us!

Contact Information:

[advancement@unt.edu](mailto:advancement@unt.edu) or 940-565-2900

# Announcements & Reminders

# University Budget Office Updates



EST. 1890

UNT®

EST. 1890



# Announcements & Reminders

## University Budget Office Team Retreat Outcomes

- Mission
  - The University Budget Office supports the UNT community with management of entrusted resources through collaboration and accountability.
- Values
  - Self-starter
  - Positive
  - Innovative
  - Capable
  - Empathetic
- Team Goals
  - Develop a continuity plan for department operations
  - Reduce length of time for Chartfield Setup/Change requests
  - Review SF Item Types and the related GL interface information
  - Create online versions of Budget Office trainings and upload into UNT Bridge



# Announcements & Reminders

## ABA Enhancements Update

- Encountered an unexpected programming complication
- Collaborating with ITSS to resolve as quickly as possible
- Planning to send out an announcement via Budget News the day before Go-Live

## Enhancements

- Reduced workflow (remove non-value added steps)
- Chart of Accounts validation (fund cat/fund)
- Budget validation (are funds available at time of submission)
- Fund transferability (state cannot move to designated, etc.)
- Deleted ABAs are now visible

# Announcements & Reminders

## Update: Asset Management

- Surplus lead has been hired, started on 10/14/2019 – Preston Rowland
- Working reducing the backlog of surplus request
  - Prioritization (safety issues, impediment to construction progress, location, date of original request)
- Working with AIT/ITSS to create Smart Forms (tracking capability and electronic workflow)
- Gas Cylinders
  - Supplier change from Airgas to Cuevas
  - Praxair conducted inventory audit – have not been billing for monthly rental fees and notified us they will start
  - IF you have empties, please complete a Cylinder Pickup Form (see email from me on 10/18/2019)
  - **IF you have abandoned a Cylinder at Discovery Park Central Receiving - you need to come back and MARK them with the Purchase Order number. If not, Praxair will not take them and the PO will continue to be billed**

# Announcements & Reminders

## Removing Old Cognos Reports

- COGNOS Reports that start with FINXXX are the newer reports that are monitored/supported by UNT System.
- Older reports will be removed very soon, they are no longer being supported/monitored and have been replaced with FINXXX reports. The reports subject to removal are:
  - Department Budget Summary
  - Sponsored Project Budget Summary
  - Non-Sponsored Project Budget Summary
  - Department Transaction Detail
  - Budget Overview Report
- If you are using a report that does not have FIN in the title, the revenue roll-forward will show in FY2019 but not in FY2020.
- If you need assistance with the new reports, please visit us on 11/11/2019 for Cognos Reports training.

# Announcements & Reminders

## PeopleAdmin System

- Administrative Announcement sent on 10/28 describing the changes.
- Several training opportunities in the month of November
  - 9 – 11 a.m. Nov. 14 at UNT Support Services Building in Denton
  - 2 – 4 p.m. Nov. 15 at UNT Support Services Building in Denton
  - 10 a.m. – noon Nov. 18 at UNT Support Services Building in Denton
  - 2 to 4 p.m. Nov. 20 at UNT Support Services Building in Denton
- The first two modules in the upgrade, Position Management (for classification and position descriptions) and Applicant Tracking, will launch on Dec. 1.
- Two additional modules, Onboarding for new employees and Performance Management for staff employees, are scheduled to launch in Spring 2020.



# Thank You.

**UNT**<sup>®</sup>  
UNIVERSITY  
OF NORTH TEXAS<sup>®</sup>

**EST. 1890**