

To:
President Gamble
Business Process Review Oversight
Committee

From:
BPR Accounting Functions Team
LeAnn Anderson, Heather Halverson, Keith
Pickering, Kevin Ward, Sheron McIlhattan,
Christina Fournier, Chris Wendland, Ed
Binkley, Duane Morris

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Grants Management

Executive Summary

At the conclusion of Phase I our team made the recommendation to pursue a modification by implementing the Grant Billing (GB) module in Banner solely on the Billings campus.

In the discovery period of Phase I it was determined that Havre and Great Falls did not currently manage the type of grants that merited GB. It was agreed that further investigation was required to determine if Billings would benefit by implementing the GB module in Banner.

Our team is now recommending at the conclusion of Phase II that consistent with Havre and Great Falls, Billings does not currently have a need for implementing the GB module based on its inventory of grants.

Summative Information and Data

OSP staff in Bozeman had indicated at the conclusion of Phase I that they would assist in the implementation of GB on the Billings campus.

At the suggestion of the Bozeman OSP staff, Billings compiled a complete list of their current grants and current billing processes. Upon review of the list, Bozeman OSP staff came to the conclusion that Billings' grant inventory did not justify implementation of the GB module since only 30 of their current grants met the need. The following chart reflects what would occur should the GB module be implemented in Billings for the 30 grants.

Function	Hours	# of Staff	Total Hours
Savings			
Time Saved per Grant (5 Min & 30 Grants)	2.5		2.5

Costs (Initial)			
Conversion Time			24
Bozeman Training Time	24	4	96
Initial Set-up of Funds	24	1	24

Totals 144

Costs (Monthly)			
Monthly Processes/Edits	1.5	1	1.5
Closing Grants	1	1	1
Troubleshooting	3	1	3
Tracking Sent Bills (Access Data Base)	0.5	1	0.5
Post Audit through SQL scripts	0.5	1	0.5
Totals			6.5

Additionally, our team requested of the Bozeman OSP staff an evaluation of whether it made financial sense to shift grant billing responsibilities for Billings' managed grants to the Bozeman OSP staff. Their conclusion was that while it would achieve a degree of centralization, the ensuing accounting reconciliations and day to day management would most likely be extremely cumbersome. The following chart reflects the scenario in which Bozeman administers the Billings GB process.

Function	Hours	# of Staff	Total Hours
Savings			
Time Saved per Grant (5 Min & 30 Grants)	2.5		2.5

Costs (Initial)			
Conversion Time			12
Bozeman Training Time	12	4	48
Initial Set-up of Funds	24	1	24

Totals 84

Costs (Monthly)			
Monthly Processes/Edits	0.5	1	0.5
Closing Grants	1	1	1
Troubleshooting	3	1	3
Tracking Sent Bills (Access Data Base)	0.5	1	0.5
Post Audit through SQL scripts	0.5	1	0.5
Totals			5.5

* The numbers reflected in the above charts are based upon the findings during an interview with OSP staff.