

# Foundation Data Model (FDM) Refinement

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May 9, 2024 ESE



# COE FDM Refinement: What/Why?

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- > Now have experience with college's FDM
- > Has → refinements for FDM
- > Goals of refinement include standardization for college-wide planning and reporting needs
- > Important for:
  - Strategic planning for hiring/multi-year commitments
  - Instruction (tuition/fee) vs administration costs
  - Student Support

# What's Changing?

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- > Standalone grant worktags that were created for your unit's main GOF and ICR funds are going away at beginning of **FY25**
  - *(Core operations only)* Shifting to using a combination of Cost center WT + Resource WT + Program WT (where needed)
  - Order of WT entry in WD Finance matters
- > Standalone grant worktags **will continue** to be used for faculty startup/ICR/sub-gifts
- > Addition of new cost centers and changed definitions about usage

# Simplified view of the College's operations



Changes 

Core Operations Cost Centers					
Academics	<b>NEW</b> Student Support	UW CC	<b>NEW</b> Summer Session	Strategic Funds	Administration
Instructional costs (Faculty/TA salaries, advising, capstone)	Scholarships Fellowships Stipends ESOs	Costs of UWCC programs + UWCC fees	Summer session expenses	Strategic Funds	Staff salaries Chair ADS

- Renaming of existing “Academics CC” to “Student Support CC” completed April 2024
- New “Academics CC” created April 2024

# Examples

Expense Ex:	Business Function				Funding Sources		
	Cost Center worktag	Program worktag	Activity worktag	Assignee worktag	Gift Worktag	Grants Worktags	Resource worktag
9 Month faculty A salary tuition-based programs	Academic CC						GOF
9 Month faculty B salary	Research CC	faculty pgm worktag					RCR
TA for tuition-based Course ENGR155	Academic CC		ENGR155				GOF
Fellowship Awards for student J.Smith	Student Support CC				GIFTxxx worktag		restricted gifts
Reimbursing RSO travel expense	Student Support CC	Program worktag					
Fee-based MS (SCTL) instruction costs	UWC2	UWC2 program worktag					Self-Sustaining

## Revenue Ex:

Startup commitment to faculty James using self-sustaining funds	Strategic CC	faculty X pgm worktag		faculty assignee WT			Self-Sustaining
MEMC support (CAS center)	Strategic CC	CAS to provide	matching				

# COE Standard Worktags (beyond Cost Center)

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## COE will setup the below:

- **COE Course (not by course section) > Activity WT**
  - > Courses with a course fee – target June 2024
  - > Courses without a course fee – target Aug. 2024
- **Student Organization (ESOs) > Program WT, target July 2024**
- **Assignee WT for all permanent faculty/PI**
  - > Prioritize faculty with startup funds – target June 2024
  - > Other faculty – target Dec 2024
- **Administrative function > Activity WT (fiscal, research, HR, IT, MarCom) - optional usage**

# What's Next?

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- > **No need to make changes to FY24 transactions**
- > **Will need to update Costing Allocations for FY25 for Core Operations – this can happen now**
- > **One-on-One meeting with department to address local level needs (we will reach out to unit administration to schedule meeting)**
  - **Unit funding (resource) mix is different**
  - **Unit internal reporting/tracking need is different**
  - **Remapping of resources to new FDM**
- > **Review existing program worktags and define usage; deactivate worktags not being used**

# Thank You!

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