

# *Getting Started with the PACE Template*



# *Understanding the objective*

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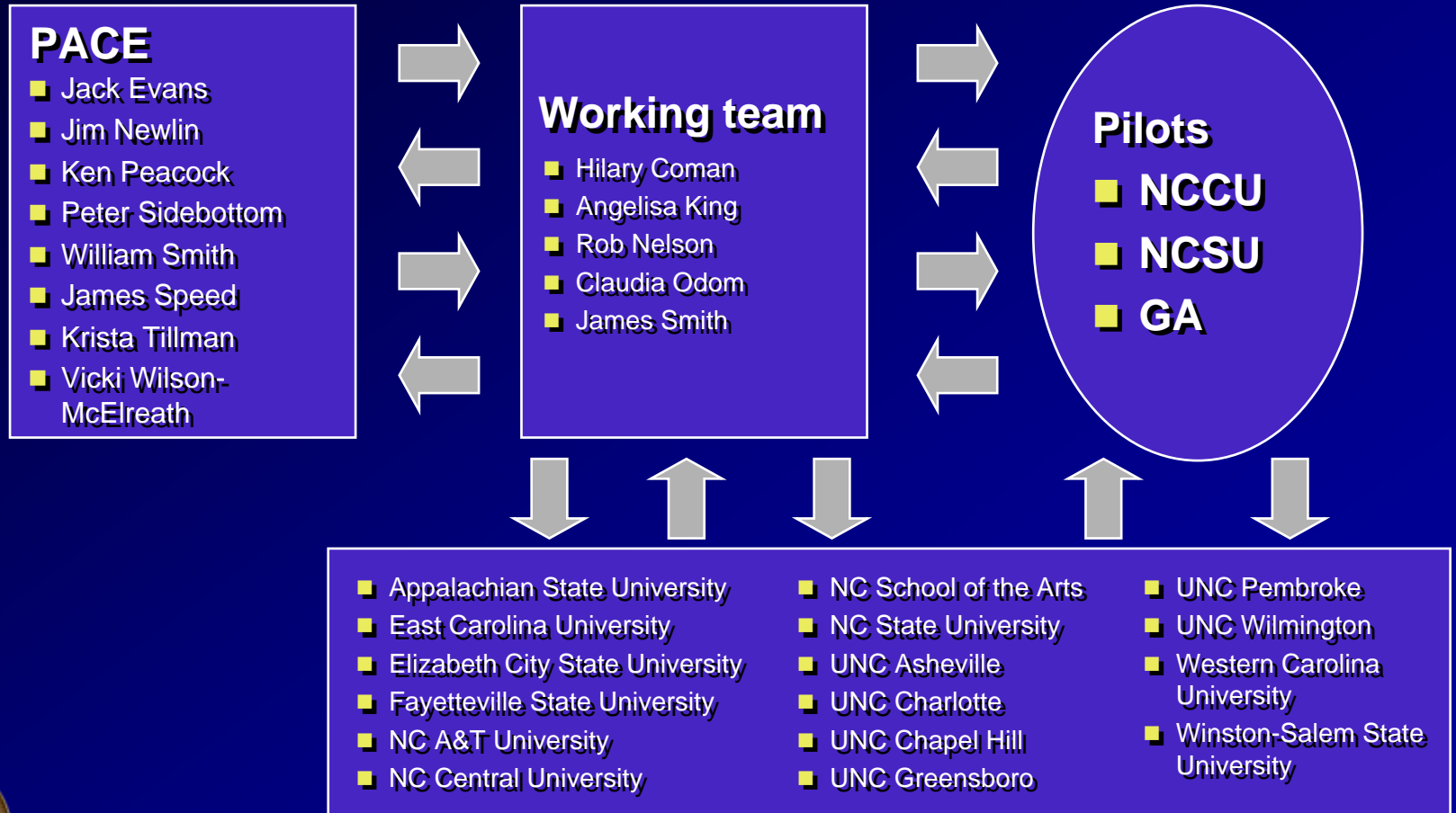
**Optimize at the  
entity level**

**Leverage system  
strengths**

**Modify or delete  
processes as  
needed**



# Understanding the actors



# *How do I get started?*

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- **Think about your unit, department, or division and what people do on a daily basis**
- **Take each FTE employee and allocate his/her time against the core and enabling functions listed (see appendix)**
- **Break down FTE employee between SPA and EPA, state appropriations and non-general funds**
- **The budget office will provide control numbers for the 2004-05 period that correspond to operating units**



# Logging in

Once logged in, this page will appear:

The UNIVERSITY of NORTH CAROLINA  
A 16-CENTURY UNIVERSITY

PACE Study - Fiscal Year 2004-2005

User ID: 000123456  
Name: Demo User  
Institution: NCSU1  
OPRID:

Data Entry  
 Reporting

46  
4610  
4620  
4630  
ALL

- 1) Select **Data Entry** (the Reporting “button” shows a data summary for an OUC; no data can be entered on the Reporting page)
- 2) Use the drop down menu to choose the **Organizational Unit Code (OUC)**
- 3) Click **Go**


**Note:** If a 2-digit OUC is selected, the data represents a rolled-up view of all 4-digit OUCs that fall under that 2-digit OUC. For a university-level report, the central office may select “ALL” and all OUC information is summed and presented as one report. You will only be able to access OUCs for which you have reporting authority



# The summary page

After logging in, the Summary Page will appear, listing both **Core Functions (3 total)** and **Enabling Functions (12 total)** in the left-hand pane. No data can be entered on the Summary Page

To begin entering data, click one of the activities under either **Core Functions** or **Enabling Functions**


[Logout](#)

Institution: NCSU1  
 OUC: 4610  
 Operator:  
 Date: 05/24/2006 10:23

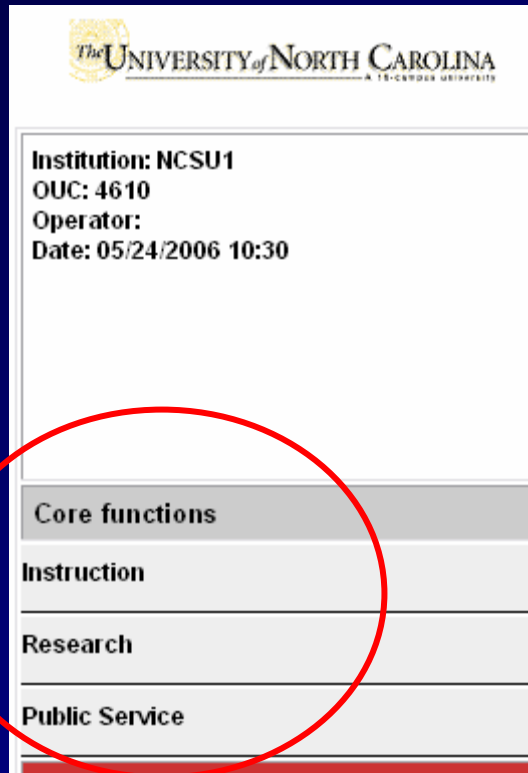
	ACTUAL EXPENDITURES FROM GENERAL FUND (STATE APPROPRIATIONS AND APPROPRIATED RECEIPTS)							
	# FTE	Personnel Costs	# FTE	Personnel Costs	# FTE	Personnel Costs		
	EPA		EPA		SPA		All Other Expenses (Balance to total)	Total Expenses
	Core Faculty	Other/ Professionals	Staff					
<b>Core functions</b>								
<u>Instruction</u>	1.00	10	1.00	10	1.00	10	10	40
<u>Research</u>	2.00	20	2.00	20	2.00	20	20	80
<u>Public Service</u>	3.00	30	3.00	30	3.00	30	30	120
<b>Enabling functions</b>								
<u>Academic administration and support</u>	3.00	12	5.00	15	1.00	10	0	37
<u>Advancement activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Auxiliary Services</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Enrollment related activities</u>	56.00	6	7.00	9	8.00	0	0	15
<u>External activities</u>	0.00	0	0.00	0	0.00	0	0	0



# Selecting functions and activities

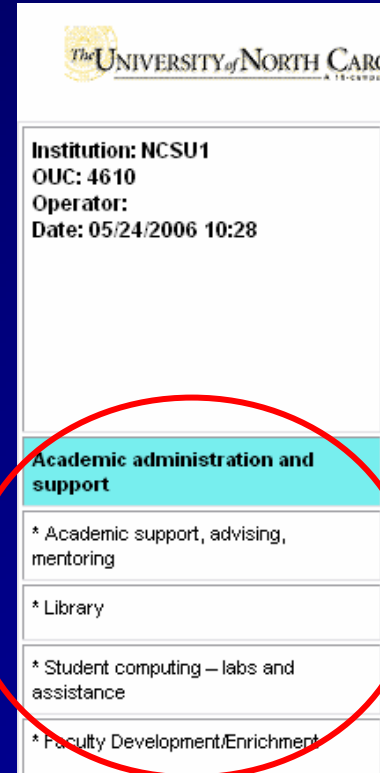
Depending on which type of function you select, you will see a list of activities that correspond to that function

Core Functions



The screenshot shows the top header with the University of North Carolina logo and the text "The UNIVERSITY of NORTH CAROLINA A TE-CARDER UNIVERSITY". Below the header, a box contains the following information: "Institution: NCSU1", "OUC: 4610", "Operator:", and "Date: 05/24/2006 10:30". Below this box is a list of functions: "Core functions", "Instruction", "Research", and "Public Service". A red circle highlights the "Core functions" option.

Enabling Functions



The screenshot shows the top header with the University of North Carolina logo and the text "The UNIVERSITY of NORTH CAROLINA A TE-CARDER UNIVERSITY". Below the header, a box contains the following information: "Institution: NCSU1", "OUC: 4610", "Operator:", and "Date: 05/24/2006 10:28". Below this box is a list of functions: "Academic administration and support", "\* Academic support, advising, mentoring", "\* Library", "\* Student computing – labs and assistance", and "\* Faculty Development/Enrichment". A red circle highlights the "Academic administration and support" option.



# Entering data

Depending on which type of function you select, you will see a list of activities that correspond to that function

	PAC				APPROPRIATIONS AND APPROPRIATIONS			
	ACTUAL EXPENDITURES				PERSONNEL COSTS			
	Personnel Costs				Personnel Costs			
	EPA	EPA	SPA	SPA	SPA	SPA	All Other Expenses (Balance to total)	Total Expenses
	Core Faculty	Other/ Professionals	Staff	Staff	Staff			
<b>Academic administration and support</b>	3.00	12	5.00	15	1.00	10	0	37
* Academic support, advising, mentoring	3.00	12	5.00	15	1.00	10	0	37
* Library	0.00	0	0.00	0	0.00	0	0	0
* Student computing – labs and assistance	0.00	0	0.00	0	0.00	0	0	0
* Faculty Development/Enrichment	0.00	0	0.00	0	0.00	0	0	0

Enter number of full-time employees (FTEs) and the personnel cost associated with those employees in the white rows/columns

Column totals appear in blue at the top of each column

Row totals appear in blue to the right of each activity

**Note:** Column and row totals cannot be manually edited



# Saving data

Once all information has been entered, click **Save**.

	Core Faculty		Other/ Professionals		Staff		All Other Expenses (Balance to total)	Total Expenses
<b>Academic administration and support</b>	<input type="text" value="6.50"/>	<input type="text" value="4584"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="4584"/>
* Academic support, advising, mentoring	<input type="text" value="3.00"/>	<input type="text" value="1534"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1534"/>
* Library	<input type="text" value="3.00"/>	<input type="text" value="2500"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="2500"/>
* Student computing – labs and assistance	<input type="text" value="0.50"/>	<input type="text" value="550"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="550"/>
* Faculty Development/Enrichment	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Save

Cancel

After clicking **Save**, the Summary Page will appear showing all data entered for each activity. Click **Cancel** to return to the Summary Page without saving data



# Summing it up

Once completed, your supervisor(s) can then examine and approve your allocations before allowing them to be rolled up

The UNIVERSITY of NORTH CAROLINA

Institution: NCSU1  
OUC: 4610  
Operator:  
Date: 05/24/2006 10:2

Approved ▼ Save

In-Progress  
Complete  
Approved  
Final

Core functions

Supervisor(s) select the status of the data entered. Completed data will be marked as such and sent to the Budget Office for Approval



# Selecting another OUC

From the Summary Page, click **Return to Main** to go back to the Login page

Enabling functions								
<u>Academic administration and support</u>	6.50	0	0.00	0	0.00	0	0	0
<u>Advancement activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Auxiliary Services</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Enrollment related activities</u>	13.00	9	5.00	0	0.00	0	0	9
<u>External activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Facilities management</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Fiscal activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Human Resources</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Information Technology</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Accountability activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Sponsored Project activities</u>	0.00	0	0.00	0	0.00	0	0	0
<u>Student service activities</u>	0.00	0	0.00	0	0.00	0	0	0
<b>Non-General Fund Total:</b>	19.50	9	5.00	0				9
<b>Control Total:</b>	0.00	0	2.00	220		1200	0	1420

Click here to return to the login page to select another OUC

Return to Main



# *Clearing up confusing situations*

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- **Example**: What do I do with a FTE with two funding sources, e.g. a PT researcher/administrator?
- **Solution**: Allocate to both core and enabling functions
  
- **Example**: What is an FTE? How do I account for 9-month contracts?
- **Solution**: An FTE is a full time employee on either a academic year or annual (12 month) appointment
  
- **Example**: I've got a lot of people doing the same thing
- **Solution**: Allocate functions across the group, no need to allocate by individual



# *Control totals*

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## ■ **Control totals are:**

- **Actual expenditures from General Fund**
- **Actual expenditures from Non-General Fund**
- **FTE position count and salaries plus an attribution of fringe benefits**



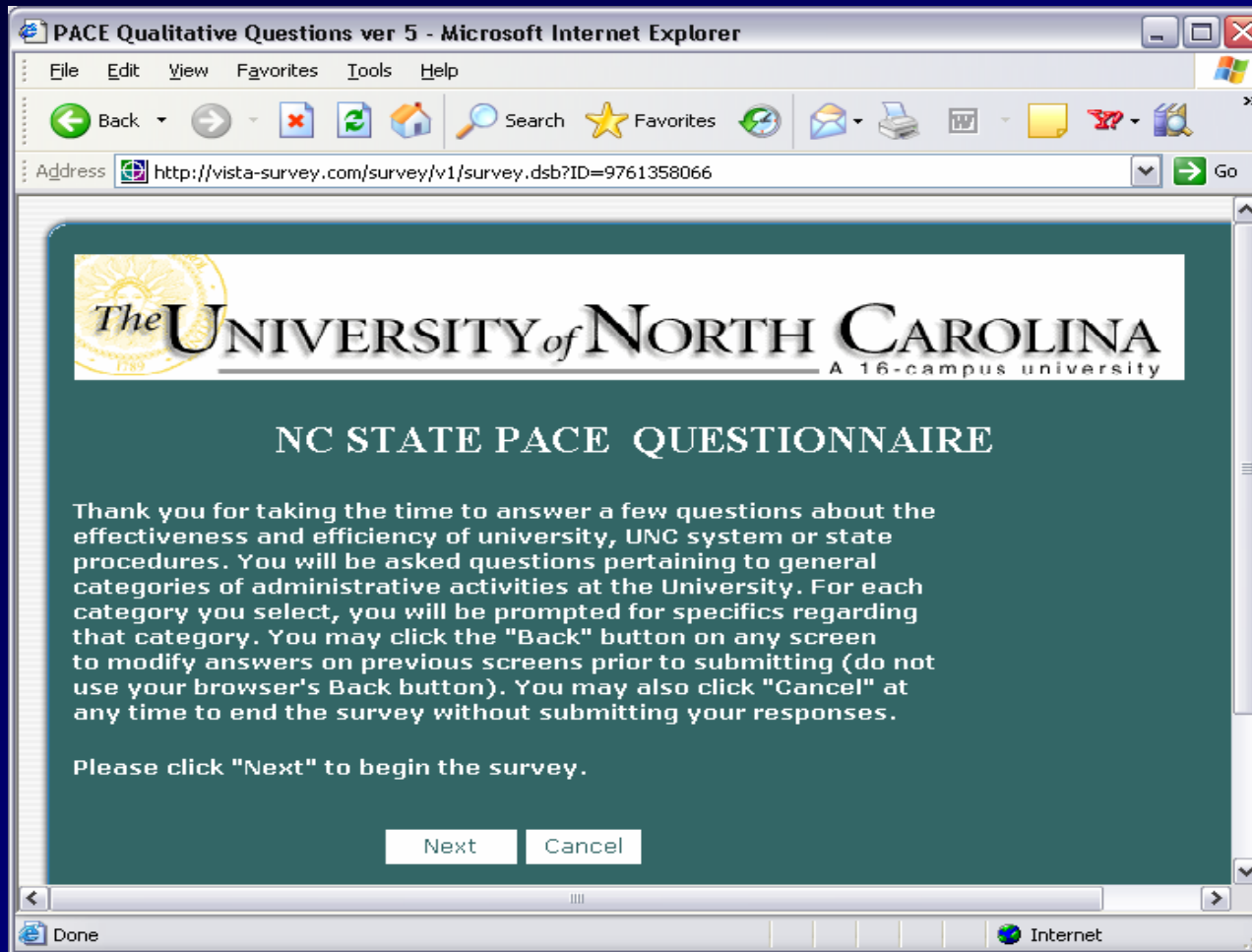
# *Control totals*

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- **Control Totals for FTEs were derived from the Personnel Data Files as of Fall 2004**
- **FTEs classified as EPA Core Faculty, EPA Other Professionals and SPA staff**
- **Detailed listing of individuals by name within an OUC will come from your budget department**
- **You should begin assembling these numbers ASAP if you have not begun already**



# *Where qualitative meets quantitative*



# *Understanding the qualitative*

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- **This portion of the PACE Study will be completed via another website. The set up is specific to narrative and open-ended questions to solicit feedback to improve administrative processes**
- **The link will be provided to you at the onset of the process**
- **Distribution on the campus to be determined by each campus**



# *Appendix: Taxonomy*

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## **Core functions**

- **Instruction includes expenditures for:**
  - **Preparation, delivery and evaluation of academic content to students (Regular Term, Distance Education, Summer School, and Lifelong Education)**
  - **Departmental research and public service that are not separately budgeted should be included in this classification**
  - **Excludes personnel expenditures for the administrative portion of academic deans. However, expenditures for department chairpersons and administrators for whom instruction is an important role are included**



# *Appendix: Taxonomy*

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## **Core functions (continued)**

- **Research includes expenditures for:**
  - **Activities specifically organized to produce research, whether commissioned by an agency, external to the institution or separately budgeted by an organizational unit within the institution**
  - **Institutes and research centers**
  - **Internally supported research programs, if separately budgeted, might be included in this category**



# *Appendix: Taxonomy*

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## **Core functions (continued)**

### **■ Public Service includes expenditures for:**

- **Activities established primarily to provide non-instructional services beneficial to individuals and groups external to the institution.**
- **Community service programs (excluding instructional activities)**
- **Medical/Veterinary Affairs – patient/client care services**
- **Cooperative extension services**
- **Conferences, institutes, general advisory services, reference bureaus, radio and television, consulting, and similar non-instructional services to particular sectors of the community**
- **Economic Development**



# *Appendix: Taxonomy*

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## **Enabling functions**

### ■ **Academic administration and support**

- **Academic support, advising, and mentoring**
- **Library**
- **Student computing – labs and assistance**
- **Faculty Development/Enrichment**

### ■ **Advancement activities**

- **Fundraising/development/management/foundation relations**
- **Alumni relations**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### ■ **Auxiliary Services**

- **Dining and Vending services**
- **Student housing operations**
- **Intercollegiate Athletics**
- **Bookstore, textbook rental, and other retail operations**
- **Parking and transportation services**
- **Motor Fleet/Motor Pool operations**
- **Printing, Copying, and Graphics Services**
- **ID Cards/One Card/All campus card services**

### ■ **Enrollment related activities**

- **Student admissions, recruitment and marketing**
- **Student financial aid and administration including scholarships**
- **Student registration, records, and retention**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### ■ **External activities**

- **Marketing, public/constituent relations, and media relations**
- **Government/corporate relations**

### ■ **Facilities management**

- **Facilities/infrastructure operations and maintenance- including housekeeping, grounds, mail/courier services, trades, and etc**
- **Facilities/infrastructure planning, design and construction**
- **Real estate management**
- **Waste Management and disposal, including hazardous materials**
- **Campus safety (police) and risk management (Environmental Health and Safety)**
- **Utilities direct costs and management**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### ■ **Fiscal activities**

- **Budget management including cash management and capital improvement**
- **Accounting**
- **Cashiering/receivables**
- **Endowment and Foundation fiscal management/oversight**
- **Payroll**
- **Materials management/procurement/purchasing**
- **Inventory control**
- **Treasury services including investment and financing/debt management**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### ■ **Human Resources**

- **Job classification, recruitment, hiring, compensation, and benefits**
- **Staff training/development and employee relations**
- **Personnel records**

### ■ **Information Technology**

- **Academic/administrative applications including web management activities**
- **Database and systems management**
- **Client support including training and applications support**
- **Network infrastructure and support**
- **Security measures, compliance, and support**
- **Telecommunications**
- **Audiovisual support**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### **■ Accountability activities**

- Legal, policy development, and compliance**
- Institutional research, planning and analysis including accreditation and assessment activities**
- External compliance and other reporting such as UNC-GA, State of North Carolina, federal government, and legislative entities**
- Disaster Recovery/Business continuity/ Organizational Resiliency**
- Equal Opportunity, diversity, and disability services**
- Auditing – Internal and External**



# *Appendix: Taxonomy*

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## **Enabling functions (continued)**

### ■ **Sponsored Project activities**

- **Research and project pre-award**
- **Research and project post-award, including fiscal administration**
- **Development, transfer, and commercialization of patents/trademarks**

### ■ **Student service activities**

- **Student programs and activities, student conduct, career planning and placement, mentoring, and student government and organizations**
- **Student health/counseling**
- **Recreation and Intramural services**

