

Demonstration on Academic Timesheet System for Academic, Teaching and Research Staff

23 May 2018
Finance Office



Restricted and for internal use only

Agenda

- Cost Allocation Guidelines of UGC
- Time Analysis Survey Approach
- Overview of Academic Timesheet System
- Demonstration on Academic Timesheet System
- What is Next
- Questions and Answers

Cost Allocation Guidelines of UGC

Objectives

- To improve financial transparency and cost charging mechanisms among UGC-funded institutions.
- To **provide documentary evidence** that there is **no cross-subsidisation** of UGC fund to non-UGC activities.



Cost Allocation Guidelines of UGC – Cont'd

Requirements

- One of the requirements is to prepare the Financial Report for FY2018-19 with:

apportionment of academic staff-related costs into UGC/non-UGC segments based on the analyses of the actual time spent by the academic staff, i.e. academic, teaching and research staff.



Full set of Cost Allocation Guidelines is available at UGC website

<http://www.ugc.edu.hk/doc/eng/ugc/note/CAGs.pdf>

Time Analysis Survey Approach

HKBU Academic and Research Departments



Professorial

Lecturers

Research Staff

Sampling by grade at University Level



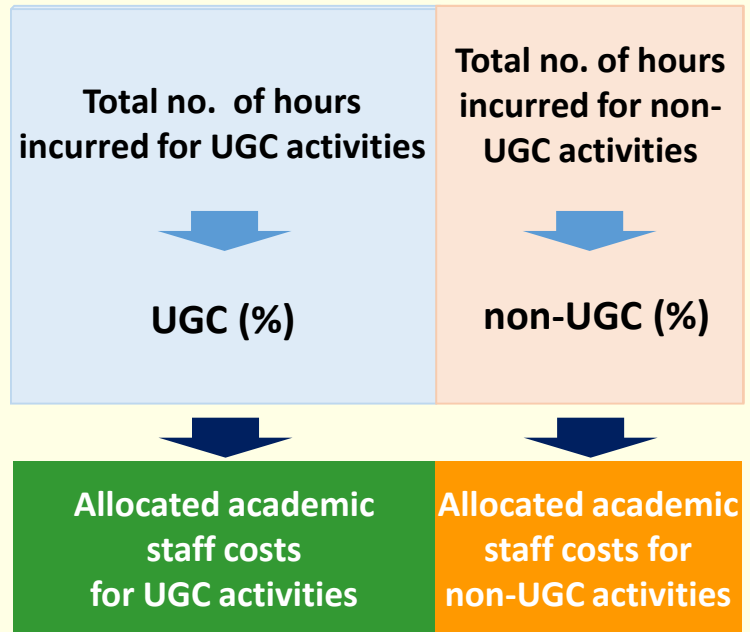
- 3 surveys per year
- 2-week duration per survey
- Select around 10% of staff from each grade per survey; around 1/3 of all staff per year
- Standard working hours not specified by UGC
- Sufficient documentation for UGC's inspection
- UGC requires endorsement of timesheet by supervisor



Time Analysis Survey

Sampling approach has been reviewed by statisticians

Use of Timesheet Data

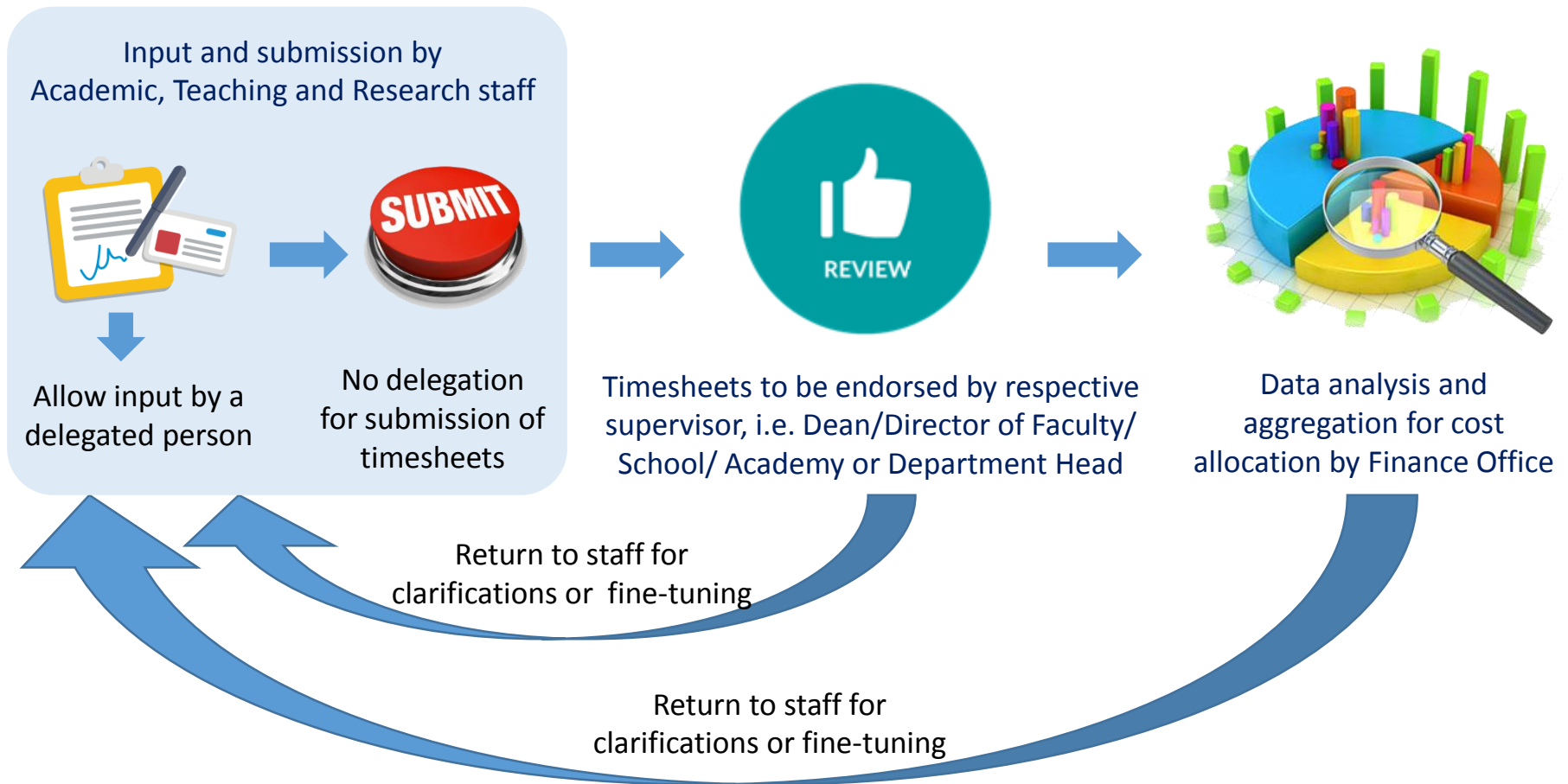


Implications



- Timesheet data will affect cost allocation to UGC and non-UGC funds
- Any unused UGC funds over a certain threshold will need to be returned to UGC

Overview of Academic Timesheet System



Academic Timesheet System - Enhancements



- The Academic Timesheet System has been enhanced in response to the feedbacks collected in the following events:
 - Consultation meetings in January 2016 and December 2016
 - Demonstration of the Academic Timesheet System in June 2017
 - Trial run in October 2017
- Enhancements of the Academic Timesheet System
 - Input content simplified if the staff's institutional activities are 100% UGC activities or 100% non-UGC activities
 - Enhanced protection of timesheet data by removing the print function for the endorser (staff can still print the completed timesheet)
 - Email notification to the staff when the timesheet data is endorsed or returned by the endorser

Academic Timesheet System – Enhancements



Nature of Institutional Activities performed during the 2-week timesheet period

1 **Mix of UGC activities
& non-UGC activities**

Input the number of hours incurred for UGC activities and non-UGC activities by date by activities category

2 **100% UGC activities
or
100% non-UGC activities**

Declare all activities performed are 100% UGC or 100% non-UGC and input total number of hours incurred



Time Analysis Survey - Data Privacy Policy

- To be reviewed by the Project Steering Committee (PSC) of the new Financial Information System (FIS) Project

Highlights

- 1 Timesheets \neq Attendance Records
- 2 Timesheets are not intended for evaluation of staff performance; Personnel Office has no access to the timesheets.
- 3 Timesheet data will be aggregated and analysed collectively by grade (Professorial, Lecturers and Research Staff) at University level.

No individual, department or faculty will be identified in the cost allocation process.

Areas covered by the Data Privacy Policy

- Collection of timesheet data
- Retention of timesheet data
- Use of timesheet data
- Security measures
- Access and correction to timesheet data

to be reviewed

Determining UGC activities and non-UGC activities



1

Refer to guidelines in
Frequently Asked Questions (FAQ)

2

Make reasonable judgements
by staff

3

Seek clarification from FO, if needed

UGC hours

and

Non-UGC
hours

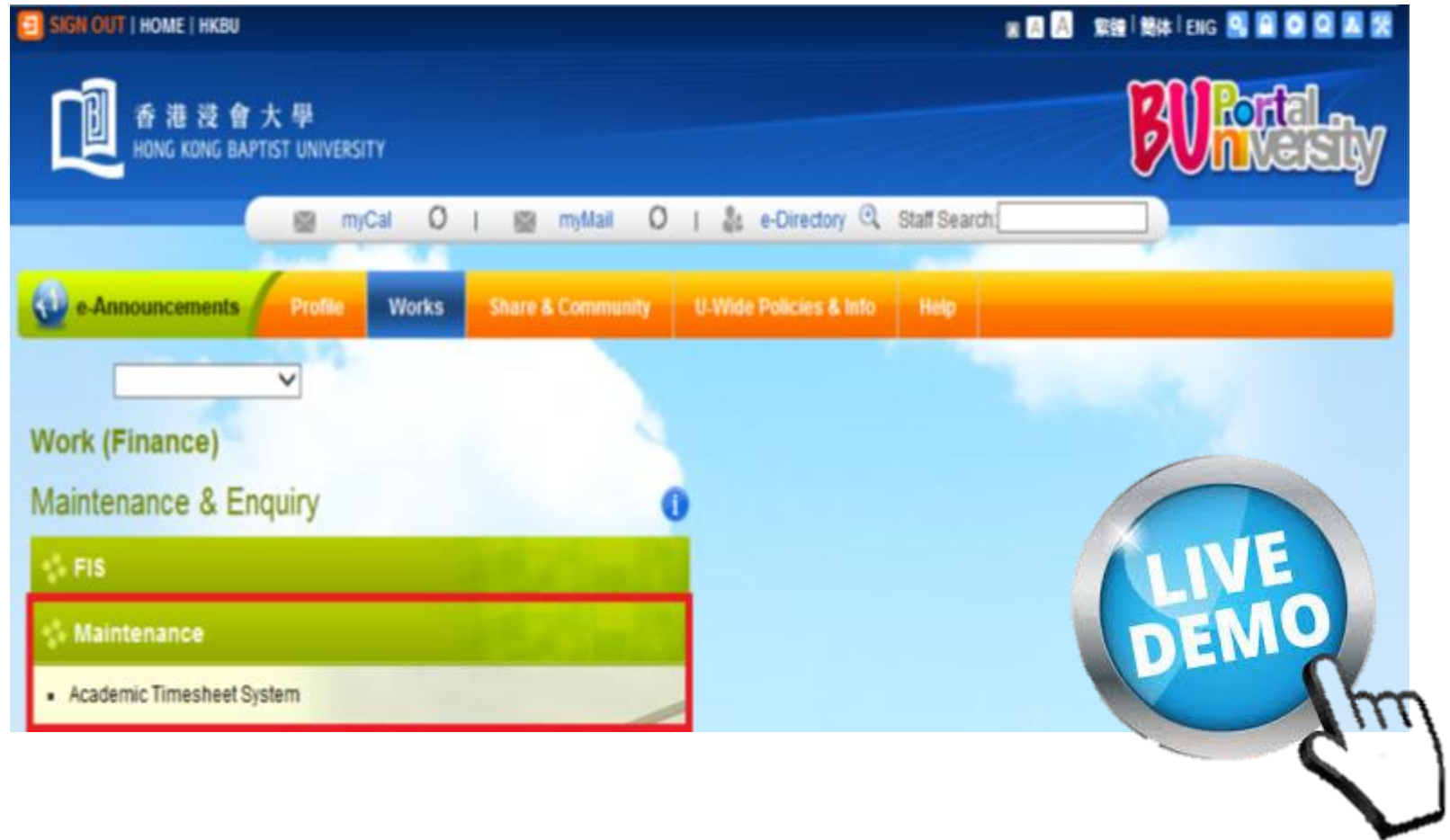


FO will seek clarifications from UGC or PSC, where necessary

- CAGs are Principle-Based \neq Rule-Based
- NOT intend to cover a exhaustive list of activities and treatments
- University should make **reasonable judgements** on treatment of activities

FAQ will be updated regularly

Demonstration on Academic Timesheet System



What is Next

- **Open access to UAT Environment of Academic Timesheet System by academic staff**
 - For academic/teaching/research staff to try the enhanced system in the User Acceptance Test (UAT) environment
 - Invitation and logistic will be sent out in early June 2018
- **Materials for facilitating the completion of Time Analysis Survey**
 - Frequently Asked Questions (FAQ)
 - User Guide for Academic Timesheet System
 - Time Analysis Survey – Data Privacy Policy
- **Conduct 3 surveys per annum starting from 2018/19 to comply with the UGC requirements**

What's Next - Time Analysis Survey in 2018/19

- Conduct 3 surveys in 2018/19: Tentatively in Oct 2018, Feb 2019 and end Mar/early Apr 2019
- Cost allocation results will be reflected in the Financial Report for 2018-19

2018/19 (Tentative Schedule)				
Jul 2018	Aug	Sep	Oct	 Time Analysis Survey
Nov	Dec	Jan 2019	Feb	 Time Analysis Survey
Mar	 Time Analysis Survey	Apr	May	Jun 2019



Regularly updated



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Questions & Answers

Your Support Means a Lot !!



Thank You