

FLORIDA BOARD OF GOVERNORS

March 18, 2004

SUBJECT: University Transition from the State Accounting System (FLAIR) to Individual University Accounting Systems

PROPOSED BOARD ACTION

Approve the FLAIR transition plan for University of West Florida, Florida State University, Florida Agricultural and Mechanical University, University of Florida, University of North Florida and Florida International University. This approval will then be submitted to the State Board of Education, who will in turn submit to the Executive Office of the Governor and the chairs of the House and Senate appropriations committees confirmation of this verification with an effective date of July 1, 2004.

AUTHORITY FOR BOARD ACTION

Article IX, Section 7, Florida Constitution and Section 1011.4105 Florida Statutes.

BACKGROUND INFORMATION

Section 1011.4105, Florida Statutes, allows any university to transition from FLAIR to its own accounting system beginning July 1, 2003. To accomplish the transition from FLAIR, the university board of trustees must submit their implementation plans to the State Board of Education for approval. The above listed universities have submitted implementation plans, and certified their readiness to transition to their own accounting system effective July 1, 2004. The other five state universities made the transition from FLAIR effective July 1, 2003.

Each devolving university is using standard software; PeopleSoft or SCT Banner. The universities have been working with their contractors, Department of Financial Services staff, other state agency staff and DOE staff for over a year in preparing for their transition from FLAIR. Each university's inspector general has reviewed and verified that the systems being implemented have adequate internal controls, and will meet the needs of the university and the continued reporting requirements of the state.

The universities submitted their transition plans to the State Chief Financial Officer (CFO) prior to November 3, 2003. Upon review, the State CFO responded favorably to each university's transition plan. The universities then submitted their transition plans and State CFO approval letters to DOE by January 16, 2004, as requested by the Chancellor.

A DOE team was constituted to review each university's plan. The team consisted of the following members:

Chris Kinsley, Comptroller – Team Lead
Tom Daffin, Deputy Comptroller
Tim Jones, Director, Fiscal Policy
Dale Bradley, University Budgets
Annie Rosier, Assistant Director, University Budgets
Charlene Waltz, Facilities Budgeting Administrator
Martha Fields, Chief, Resource Information Systems
Joe Knicely, Director of Audit Resolution
Laure Boyd, Office of the Inspector General
Bob Henker, Associate Vice Chancellor, Division of Colleges and Universities

For over a year DOE staff members have been cooperatively engaged with the devolving universities to make this transition successful. The DOE team reviewed each university's plan and submitted a series of clarification questions on specific points of each plan as needed. Further, each president submitted a certification letter indicating that their university was ready to transition from FLAIR. DOE will continue to provide technical assistance to each of the devolving universities during the transition period. Additionally, participation in the Department of Financial Services weekly devolution team meetings provides a continuing opportunity to address challenges and concerns.

The team recommends approval by the Board of all FLAIR transition plans.

Supporting Documentation Included:

- 1) University Certification of Readiness
- 2) State Chief Financial Officer Approval

Facilitators/Presenters:

Nancy McKee