The Effort Reporting System (ERS) was developed by and for each of the University of California campuses.

Development was guided and financially sponsored by the Berkeley, Davis, Los Angeles, San Diego, and San Francisco campuses and the Office of the President.

Campuses that were not among the original sponsors are expected to implement the ERS as a replacement for the old A21/PAR system. Implementation of the ERS comes with campus responsibilities for the ongoing support and maintenance of the Base ERS in two forms: 1) full participation in the ERS oversight groups (see “Consultative Participation”, below) which guide the ongoing support and maintenance of the Base ERS, and 2) by contributing to the costs for Base ERS support and maintenance.

Financial Participation

By direction of the Budget and Planning Officers in 2006:

- the original six sponsors have paid for the development of the Base ERS and will not recover any of the development costs.
- beginning with FY 2006-2007 each campus that performs effort reporting using ERS will contribute to the annual support costs. Individual campus contributions will be the projected expenses for the current fiscal year pro-rated by Total Direct Cost of research from the prior fiscal year. The ERS Management Group has established a process for making and approving cost projections each year.

Campus funding of Base ERS support and maintenance is apart from local campus ERS operational costs and any UCOP ERS Hosting costs, should the campus elect to have UCOP host their ERS.

Consultative Participation

The hallmark of the development of the ERS has been the collaboration by numerous individuals from each campus in guiding the requirements for and development of the Base ERS. As shown in the diagram on the following page, the Base ERS has three significant consultative groups.

Each campus will identify representatives to participate in the consultative groups as follows:

- one representative to the Management Group with the decision-making authority for the campus in guiding the direction of the Base ERS, policy, and operational matters.
- one or more representatives to the Requirements Committee. Representatives should have first hand knowledge of the effort reporting process on the campus and responsibility for implementing the ERS at the campus.
- one or more representatives to the Technical Advisory Group. Representatives should have the technical understanding of campus feeder systems (e.g., financial, PPS, etc.).
**Management Group** – provides overall guidance to the project, resolution of policy and scope issues, and communication about the project with their colleagues across the University and on their respective campuses. This group will set the direction for deliverables, timelines, and monitor project progress. Time commitment: 2 hours per month.

**Base ERS Team (UCOP)** – Guides the process of supporting the Base ERS, prepares and seeks clarification of enhancement requests, performs the maintenance of the Base ERS, including programming, issuing releases, tracking of enhancement requests and bug fixes. Coordinates the agendas of the Management Group, Requirements Committee, and Technical Advisory Group. Staffing paid for through Base ERS annual support and maintenance funding.

**Requirements Committee** – describes effort reporting business processes and articulates detailed needs and requirements for the Base ERS system, reviews and prioritizes enhancements requests. Time commitment: 2-4 hours per month.

**Technical Advisory Group** – reviews technology selections, technical designs, technical implementation issues and acts as the conduit for reporting technology problems.

---

**Management Group**

- Sue Abeles, Los Angeles, Assistant Vice Chancellor – Corporate Financial Services/Controller
- Mike Allred, Davis, Associate Vice Chancellor – Finance/Controller
- Jim Corkill, Santa Barbara, Controller
- John Ellis, Berkeley, Associate Vice Chancellor Finance and Controller
- Karl Heins, UCOP, Director, IT Audit Services
- Don Larson, San Diego, Assistant Vice Chancellor – Business & Financial Services/Controller
- Bobbi McCracken, Riverside, Assistant Vice Chancellor – Financial Services
- Bruce Morgan, Riverside, Assistant Vice Chancellor – Research
- Jorge Ohy, UCOP, Manager, Costing Policy & Analysis
- Eric Vermillion, San Francisco, Associate Vice Chancellor Finance