# FOUNDATION UPDATES

From Accounts Payable to Revenue Operations

Presented by: UB Foundation

- Patrick Richey, Chief Financial Officer
- Chris Decker, Senior Director

# When to Contact…Accounts Payable

- When submitting disbursement requests (DRs) in one single approved PDF

- Submitting expenditure transfer forms

- Submitting invoices from vendors for UBF POs

- American Express applications

- Lost or missing check inquiries

- Questions regarding specific UB Foundation fund transactions

Contact information for Accounts Payable: ubf-ap@buffalo.edu
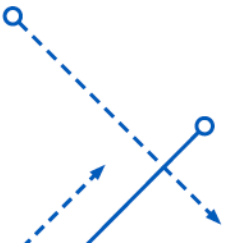
# When to Contact…Financial Services

- When you have questions regarding the fund/account balance within SIRI – if it's different than you were expecting

- When you have questions regarding the timing of requested transfers

    - If you are having trouble locating a requested transfer

- If you need supporting documentation for RF related payroll encumbrances


Contact information for Financial Services: UBF-journal@buffalo.edu
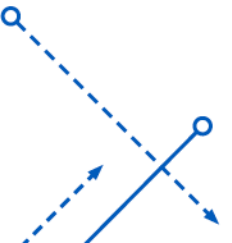
# When to Contact…Payroll

- When you have questions regarding paychecks- this includes earnings, deductions, or tax withholdings

- For any payroll related inquiries- employee portal access, direct deposit setup or issues, lost checks, changes to federal and state tax withholding elections, and access to W-2 forms

- When you have questions regarding processing of ePTFs for UB Foundation Activities (UBFA) appointments and changes.


Contact information for Payroll: UBF-payroll@buffalo.edu
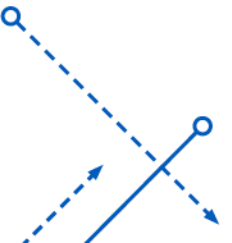
# When to Contact…Benefits (for UB employees payrolled by UBFA)

- When a participant has experienced a significant life event that would impact your benefits/dependents

    - This includes birth, death, marriage, divorce, loss of employment

- When a participant needs to take a leave of absence due to medical reasons or to care for a family member

- Questions regarding a participant's eligibility

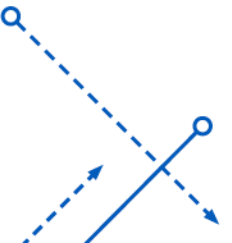    - For example: upon becoming a full-time employee, upon hire, upon termination, etc.

Contact information for Benefits: UBFhr@buffalo.edu
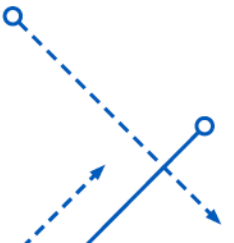
# When to Contact…Fund Authorization

- Entity Revision on a Fund

- Adding/removing Cost Approver, Inquiry, and Scholarship Access

- General Fund Revisions

Contact information for Fund Authorization: UBF-auth@buffalo.edu

# When to Contact…Gift Administration

- Gift agreement process

- Interpreting gift agreements and donor intent

- Difficulty spending philanthropic funds

- Endowment Fund performance
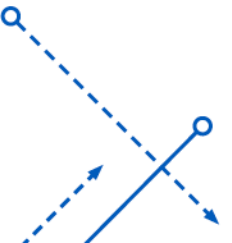
- Transferring money from philanthropic funds


Contact information for Gift Administration: UBF-agreements@buffalo.edu
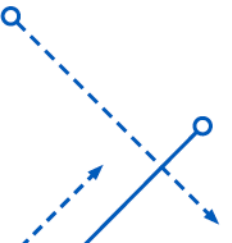
# When to Contact…Revenue Operations

- Deposits

- Payment Types (Credit Card, EFT, Wire, etc.)

- Matching Gifts and Claims

- Gift Receipts

- Pledge Reminders

Contact information for Revenue Operations: UBFgifts@buffalo.edu

# Summary of Contact Emails

- Accounts Payable: ubf-ap@buffalo.edu

- Financial Services: UBF-journal@buffalo.edu

- Payroll: UBF-payroll@buffalo.edu

- Benefits: UBFhr@buffalo.edu

- Fund Authorization: UBF-auth@buffalo.edu

- Gift Administration: UBF-agreements@buffalo.edu
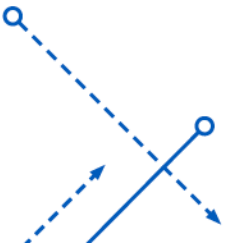
- Revenue Operations: UBFgifts@buffalo.edu
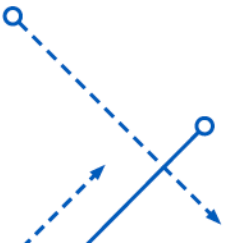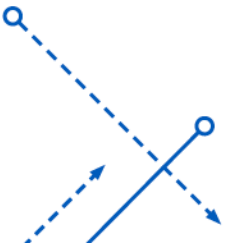
# NEW INITIATIVES

# UBF New Initiatives

- The Commons

  - 90,000 square foot building

  - Assumed control in February 2025

  - Restaurants, retail and offices – 30 different tenants

  - Planned improvements and collaboration with UB

  - Property Manager

# UBF New Initiatives

- Hauptman-Woodward Research Institute

  - 75,000 square foot building

  - Assumed control in January 2025

  - Dedicated to improving the health and well-being of humanity through structural biology with innovation, discovery, and education

  - Strategic partnering with UB for future use of building
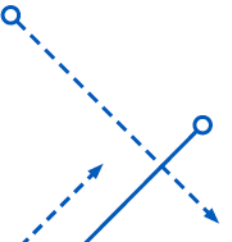
# UBF New Initiatives

- Integration of UBF funds with UPlan

    - Collaboration with UB

    - Creation of new fund codes where possible

    - Streamline reporting

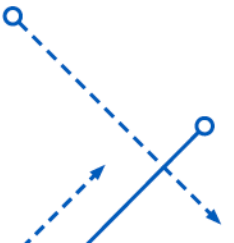    - Help with planning and budgeting
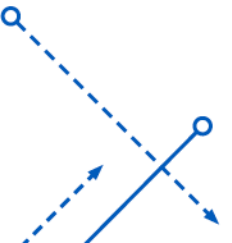
# UBF New Initiatives

- Strengthen existing partnerships

- Create new partnerships

# QUESTIONS??

# How did we do?

**Complete the session survey using your smart device:**

Scan the QR code provided on your schedule.

**OR**

Scan the QR code shown here.