

UBIT Questionnaire Improvement Project

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UNIVERSITY OF
South Carolina

Why This Project?

Purpose:

To strengthen the UBIT questionnaire process so it consistently delivers clarity and accuracy in a more efficient and sustainable way for both departments and the tax team.

Why It Matters:

The existing process required frequent follow-up, created delays in data collection and review while increasing the workload for the tax team.



Intended Outcomes and Goals

Intended Outcomes:

- Improved accuracy of department submissions
- Reduced follow-up and back-and-forth communication
- Shorter processing and wait times
- Reduced workload for the tax team

Success Looked Like:

Fewer questionnaires requiring follow-up, faster turnaround times, and clearer communication between departments and the tax team.



People Involved

Project Sponsor:

Lindsey Cox, Assistant Controller, Office of the Controller – Tax

Project Lead:

Kadejah Bethea, Senior Compliance and Tax Accountant

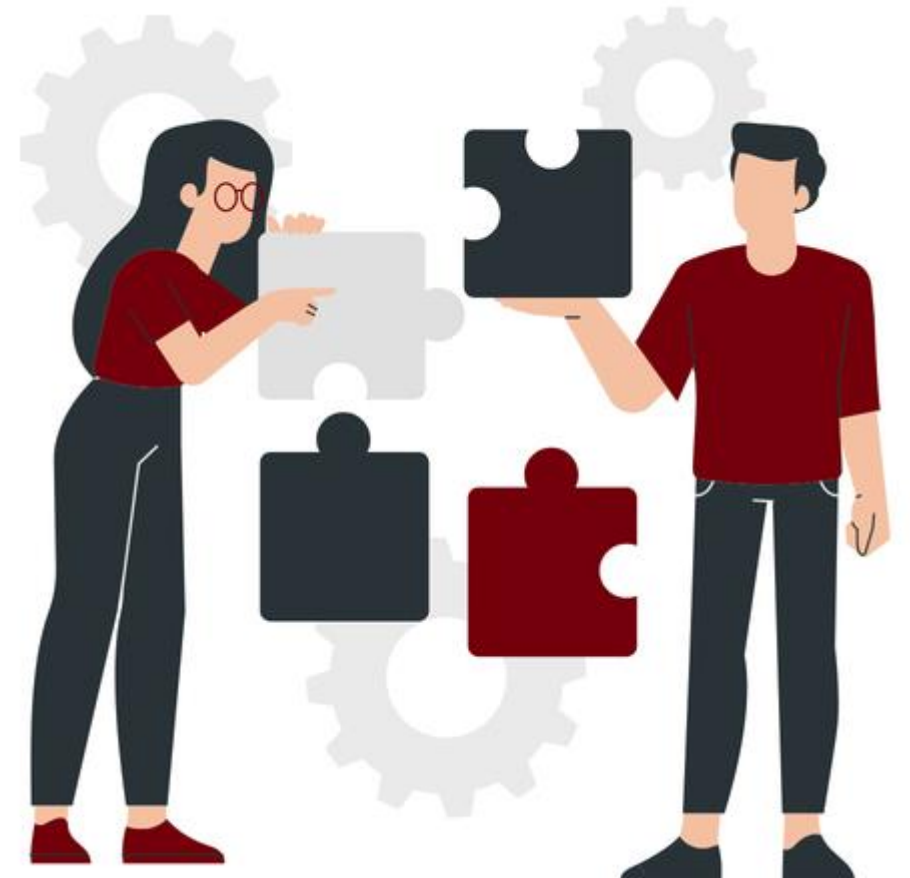
Tax Team Members:

Shannon Nickens, Senior Compliance and Tax Accountant

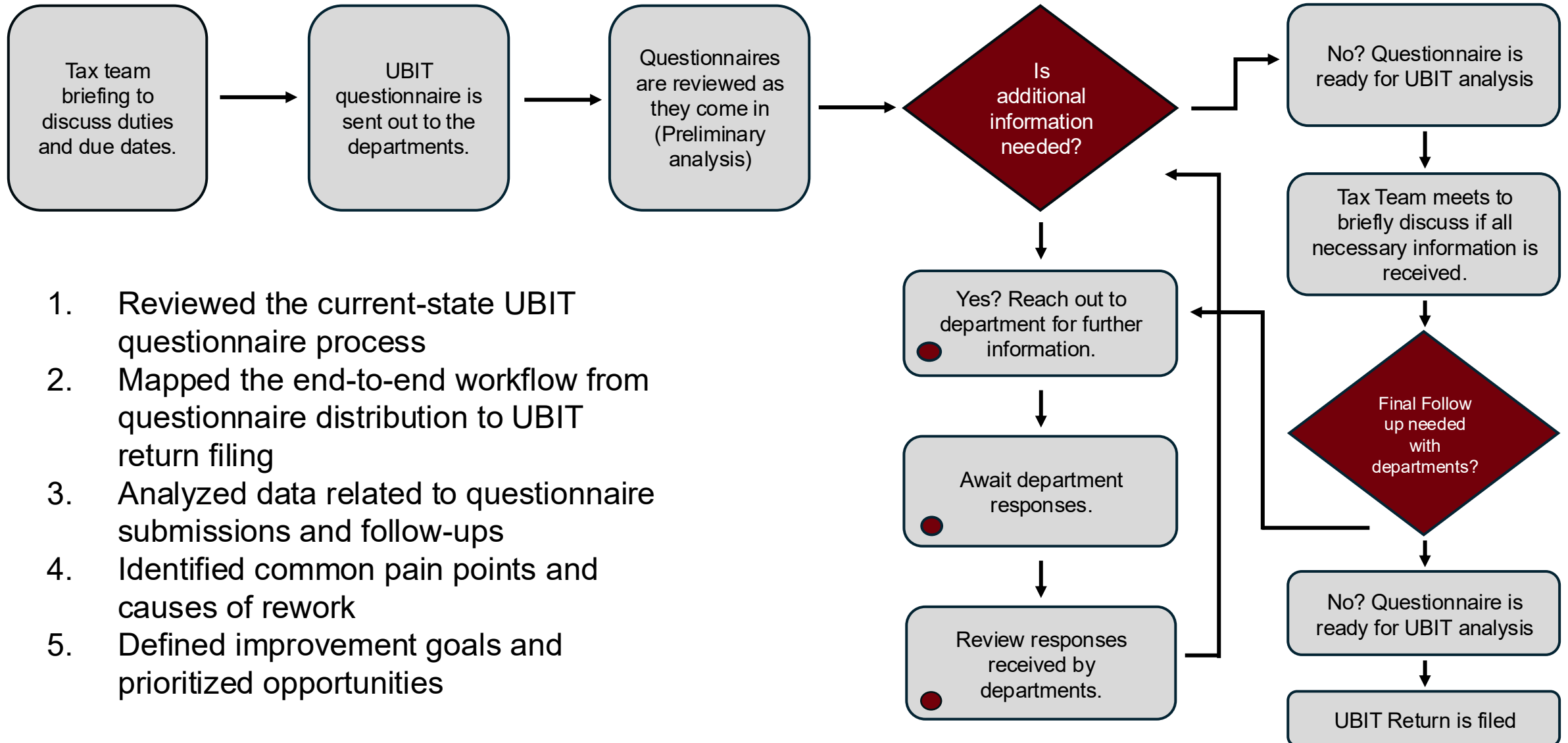
Douglas Bailey, Director of Tax

Primary Beneficiaries / Stakeholders:

Tax team and campus departments including business managers, directors, accountants, and administrators who complete the questionnaire.



Project Path – What We Did



Current-State Challenges

What We Observed:

- 86 questionnaires submitted
- 42 (49%) required follow-up
- “Unsure” responses triggered additional communication
- Key details (e.g., chartfields) often missing

Impact:

- ~17 additional staff hours spent on rework
- Delays of up to one week
- 6.5-day average wait when follow-up required

	BEFORE Improvements (Baseline)
Steps in Process	21 Steps
Requiring Follow-up	42 of 86 (49%)
Additional Time for follow-ups (rework)	17 Hours
Delay due to follow-ups	6.5 Days avg.



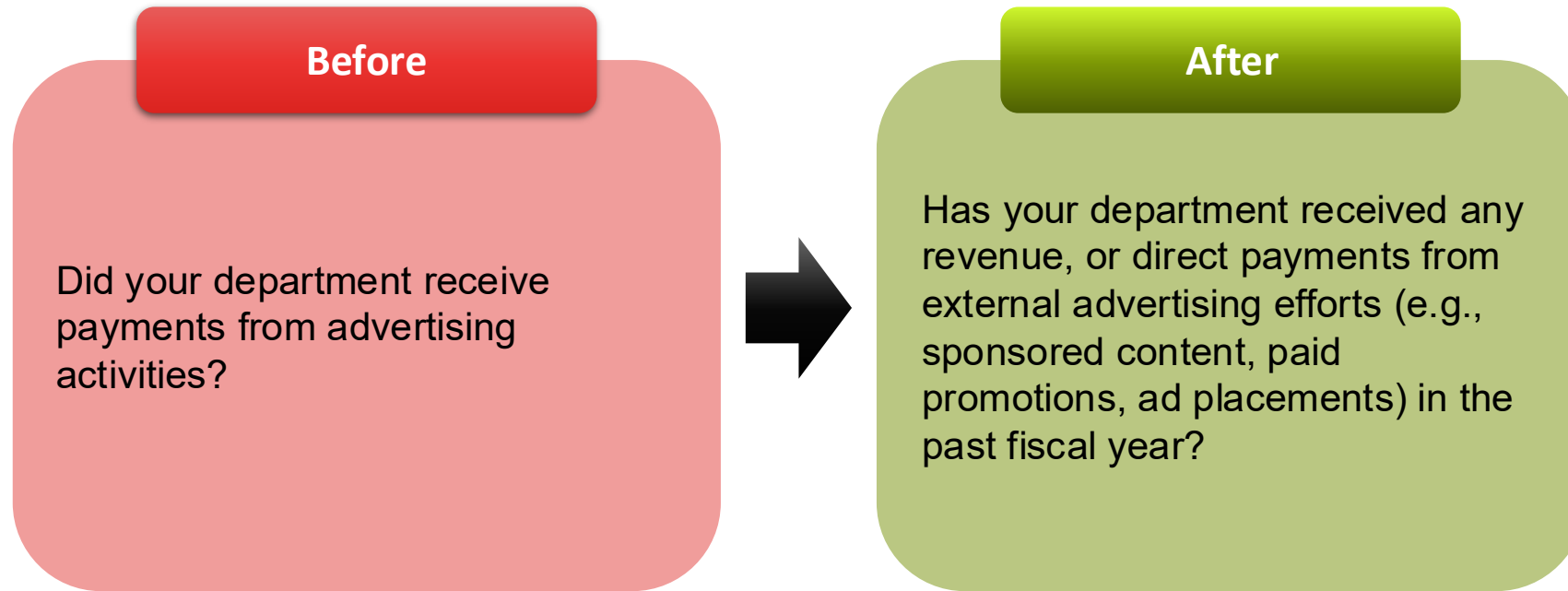
Key Improvements

Top Improvements Identified:

1. Implement clearer, concise questions.
2. Develop a centralized tracking system to monitor questionnaire submissions.
3. Develop a risk-based rotating schedule for the questionnaire. Special events will be included within the annual submission while the smaller departments will likely be within every other year submission.



Key Improvement: Clearer Question Design



Improvement: Adds specificity and examples for more accurate responses.



Projected Results

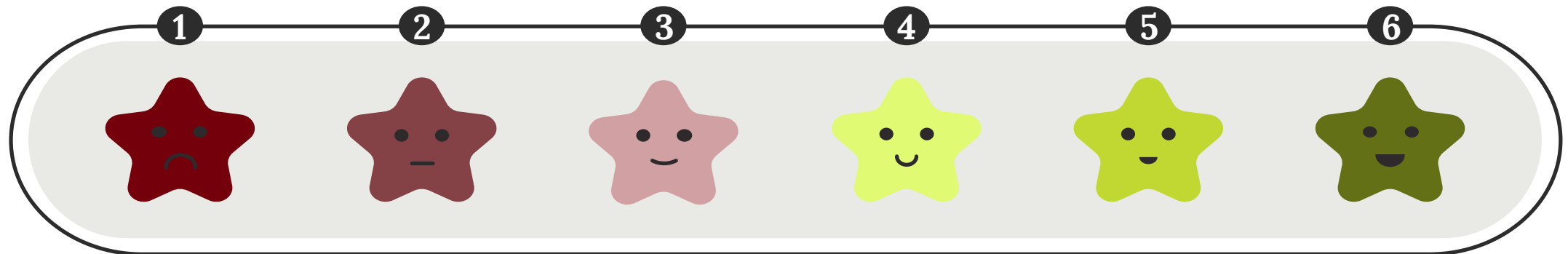
	BEFORE Improvements (Baseline)	AFTER Improvements	PROJECTED RESULTS
Steps in Process	21 Steps	12 Steps	43% Reduction
Requiring Follow-up	42 of 86 (49%)	10 (12%) est.	76% Reduction
Additional Staff Time for follow-ups (rework)	17 Hours	5 Hours	71% Reduction
Delay due to follow-ups	6.5 Days avg.	3 Days est.	54% Reduction



Why the Results Matter

Value Created:

- **For departments:** clearer expectations and less back-and-forth
- **For the tax team:** reduced rework and more time for value-added work
- **For the organization:** improved compliance, efficiency, and sustainability



Next Steps

Complete improvements by May 2026:

- Refine questionnaire with clearer, more concise questions
- Develop centralized tracking system for submissions
- Implement risk-based rotation schedule (annual for high-risk areas; biennial for lower-risk departments)
- **Begin using the updated process for the next questionnaire cycle**

Sustaining the Improvement:

- Monitor follow-up rates and cycle time
- Gather feedback from departments and the tax team
- Make targeted adjustments to ensure long-term effectiveness



Key Takeaways

Reflections on The Project Content and Next Steps:

- Small inconsistencies or unclear steps create confusion across departments.
- Improving clarity at the start of the UBIT process increases efficiency for all.
- Focusing on clarity, simplicity, and sustainability when refining processes.
- Conducting more consistent process reviews to identify gaps early
- Using lessons from this project to strengthen collaboration with departments.

Reflections on Being an Improvement Leader:

- Effective process improvement depends on clear communication, aligned expectations, and shared ownership.
- Meaningful improvements often come from small, targeted changes rather than major overhauls.

Thank You!

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