

Office of Finance & Administration

Faculty Senate Update

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January 6, 2016

Advance “University of 21st Century” cornerstones:

- Revenue enhancement
 - Reputational enhancement
 - Administrative enhancement
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- **Finalize realignment/reconfiguration of Office of SVP Finance & Administration**
 - **Enhance financial controls**
 - **Improve administrative functionality/processes/services**
 - **Create revenue opportunities/improve business practices**
 - **Enhance facilities**

- **Finalize organizational realignment/reconfiguration**
 - Established new unit dedicated to process improvements, system enhancements, operational efficiencies, and customer service
 - Strengthened Lead Fiscal Officer (LFO) oversight/management

- **Enhance financial controls**
 - Continued to implement Strothman report recommendations
 - Strengthened Compliance Oversight Council
 - Enhanced Policy & Procedure guidance & communication
 - Strengthened financial oversight & accountability
 - Finalized LFO job descriptions
 - (S&P) Standard and Poor's Bond Rating “AA-”/Stable Rating – December 2015

- **Improve administrative functionality/process/services**
 - Advanced HSC/Belknap Shared Services
 - Early “wins”
- **Identified under-invested “reserve” accounts**
 - State-held Bond Funds - \$1.857M
- **Broaden partnerships**
 - International Student Recruitment
 - Campus Dining/Bookstore
 - Credit Union

Early “wins”

- **Performance Reviews**
 - Required performance evaluation for all staff as prerequisite for salary increase
 - 1st time staff raises included merit component
- **UofL Benefits self-service**
 - Enhanced Open Enrollment self-service & benefits confirmation statement
- **Travel & Expense module**
 - Replaces paper-based travel voucher to expedite processing and reimbursements and facilitate data analysis of expenses and merchant information
- **Automation of A/P ACH file (vendor payments) to PNC**
 - Eliminates manual adjustments; increased financial control
- **Information Technology enhancements**
 - Improved HelpDesk experience, user-friendly features and improved incident management options
 - Installed new password protection protocols

Active Searches

(Target fill date)

- **Associate Vice President for Business Services**
 - February 1, 2016

- **Associate Vice President for Facilities Management**
 - April 1, 2016

- **Associate Vice President for Audit/Compliance**
 - May 1, 2016

- **Associate Vice President for Human Resources**
 - June 1, 2016

- **SAC renovation plan**
- **Academic Classroom Building plan**
- **A&S existing classroom upgrades**
- **Middleton Auditorium**
- **“L” Trail lighting upgrade**
- **Medical Dental Research masonry restoration**
- **HSC Elevator upgrades**
- **HSC 55A Air Handler**
- **Middleton Auditorium (seating)**

GOALS

January – June 2016

- **Finalize Realignment/Reconfiguration of Office of SVP Finance & Administration**
 - All positions filled; leadership team in place

- **Enhance financial controls**
 - Complete Strothman recommendations
 - Strengthen financial accountability

- **“Technology roadmap”/IT strategic plan**
 - New ERP (Enterprise Resource Planning) System
 - Assessment Jan-Mar ‘16
 - New/upgraded system 2018

- **Improve business practices/broaden revenue base**
 - Select Campus Dining & Bookstore partnerships
 - Health Insurance/Vision/Dental, Banking, Managed Print Services, Wireless Broadband, Collection Services, Risk Management
 - Finalize International Recruitment partnership
 - Utilities efficiencies

- **Facility enhancements**
 - Finalize space transition plan; SAC/Crawford
 - Finalize design/space configuration: Academic Classroom Building
 - Begin SAC construction/Crawford demolition

- **“Performance Takes Flight”**
 - Performance Management Training for all Managers/Supervisors of Staff

- **Improve administrative functionality/process/services**
 - **Shared Services – activate operational centers on both HSC/Belknap campuses**
 - **New Budget Model - “test” viable models FY’17**
 - **“Wins”**
 - Self-Service Direct Deposit (includes ability to deposit to multiple accounts)
 - Self-Service W-4 Withholding Form (transition from paper to electronic)
 - New Payment Request functionality (replaces paper process)
 - Improved timekeeping functionality (improve self-service entry & calculations without e-mailing spreadsheets)
 - Payroll calendar review (shifting monthly payroll schedule later in month to reduce overpayments, paper checks, etc.)
 - Automation of *Payroll* ACH file to PNC (January 2016)

- **Unit-specific goals in HR, Audit, and Public Safety**

- **“Run, Hide, Fight” - National Standard**
 - Sessions will begin in January on Belknap, HSC & Shelby Campuses
- **Multiple Training Formats**
 - Online - Presentation & video
 - In-person - Facilitated by ULPD - Presentation, video and Q&A
- **Drills**
 - Offered to the University community by school or building
- **Informational Material**
 - Posters & Pocket cards

Questions?