Business Administrators’ Forum

May 19, 2016
10:00 a.m. – 11:45 a.m.

401 C/D Benson
Welcome
Presenter: Sharon Anderson, Financial Services

“How We Do Business at Wake” Orientation Program
Presenters: Nathan Anderson, Director, Finance Systems and Jennifer Rogers, Learning & Development Specialist, Finance Systems

Procurement Services Update
Presenter: Rosey Murton, Director, Procurement Services

Administrative Technology Update
Presenters: Brandon Gilliland, AVP for Finance and Controller and Carmen Canales, Chief Human Resources Officer

Human Resources and Payroll
Presenters: Kim Crewey, Assistant Controller, Financial Operations; Cathy Piño, Director, Payroll; Kriss Dinkins, Director, Recruitment & Operations; and Pearlie Patton, Human Resources Operations Manager
“How We Do Business at Wake”
Orientation Program
Nathan Anderson & Jennifer Rogers

Business Administrators’ Forum
May 19, 2016
What is the Purpose of the Orientation Program?

• Serves as an introduction to the people, policies, procedures and resources of Financial Services

• Provides key information on what you need to know in your first 30 days in a business administrator role
  – Can also be used by experienced business administrator for a high level review on particular topics

• Continues the broader mission of the Business Administrator Forum to provide relevant and timely training to individuals across campus
• Received anecdotal feedback over time from new business administrators that it is difficult to know where to get started

• Conducted a comprehensive survey in early 2015 that identified subject areas and topics of importance to business administrators

• Received important feedback from the pilot group
<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
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<tbody>
<tr>
<td>Judy Burkhard</td>
<td>Advancement</td>
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<td>Barbara Collie</td>
<td>Information Systems</td>
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<td>Kimberly Couch</td>
<td>Sustainability</td>
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<td>Luci Hill</td>
<td>Athletics</td>
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<td>Marie Isaacs</td>
<td>School of Business</td>
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<td>Gina Jarrett</td>
<td>School of Law / PCL</td>
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<td>Melissa Mickles</td>
<td>Provost’s Office</td>
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<td>Irene Picconi</td>
<td>Romance Languages</td>
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<td>James Smith</td>
<td>Financial Services</td>
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<td>Deborah Snyder</td>
<td>Teaching &amp; Learning Center</td>
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<td>Erica Talley</td>
<td>Sociology</td>
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<td>Rolisa Tutwyler</td>
<td>Pro Humanitate Institute</td>
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<td>Crystal Reid</td>
<td>Dean of the College</td>
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<td>Lesley Whitener</td>
<td>Physics</td>
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<td>Vicky Zickmund</td>
<td>Bioethics</td>
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So let’s see it already!
Your Turn

• Orientation program URL
  – http://finance.wfu.edu/online-learning

• Everyone invited to the BAF meetings is already enrolled in the course
  – Please email Jennifer Rogers if others would like to take the course as well
Expanding the Training Conversation

• Question: How much do you know doing business at Wake?
  – Hint: Probably more than you think!

• Consider volunteering to be a mentor or buddy with another business administrator to share your knowledge and experiences
  – Keep it simple or make it more structured – whatever makes sense and is most comfortable

• Contact Sharon Anderson or Jennifer Rogers to volunteer or request to be partnered with another business administrator
For questions after the meeting, please email Jennifer Rogers at:

rogersjh@wfu.edu
Procurement Services Update

Rosey Murton

Business Administrators’ Forum
May 19, 2016
Office Supplies: Current State

- Office Depot is current vendor. Co-sourced with Medical Center in FY2012
- Campus has provided feedback on pricing.
- Result is reduced spend and incentives.
- Current market status: Merger between Office Depot/Staples was declined by the FTC. We believe this will continue to remain the case due to decreased competition critically affecting the business sector of the market.
- The current status created a need to relook at our agreement and negotiate a stronger, better agreement.
- We benchmarked with Staples and Office Depot.
1. Product Savings – 4.3%

2. Scholarship/Intern Incentive – $7,500 per year

3. Aggregate Spend Incentive – 5% reduction to Master Core list - estimated 2% overall savings - this could vary up or down based on spend on the master core.

4. Product Category Incentives - Will vary depend on category but you are currently meeting the technology and cleaning/breakroom categories spend.

Total estimated annual savings in Year 1 - 18.4% based on $500,000 spend
A few last notes:

*Pricing is better than the current agreement because we are riding Florida Universities’ agreement.*

**New Features:**

- **Scraping Software** – allows Office Depot to search websites to capture “promotional pricing”

- **Price Matching** – allows for us to work with Office Depot to match pricing.
Administrative Technology Update
Brandon Gilliland & Carmen Canales

Business Administrators’ Forum
May 19, 2016

WAKE FOREST UNIVERSITY
Finance and HR systems emerged as a leading pain point requiring immediate action.
• Current Banner HR and Finance systems have significant capability gaps

• Requires a constellation of “bolt-on” solutions

• Substantial effort to maintain technology

• Significant manual, paper-based processes and shadow systems

• Unsupported, home grown budget system

• Limited business intelligence

• Uncertain direction with current vendor
Modernize service, improve administrative productivity and contribute to a climate of innovation

A University strategy is critical to be more efficient, mobile, and responsive to the needs of faculty, students and staff.

Processes should be more consistent, paperless, and automated

Data should be more readily available for analysis
Solution selected to enable University’s innovation strategy: Workday

- **Scope**: Finance, Human Resources, & Business Intelligence

- **Approvals**: ITPC, ITEC, and Board Approved

- **When**: Implementation planning over summer

- **Go-Live**: TBD, estimate total of 24 months
Workday Site-Visits: 
*Finance, HR, IS*
- University of Miami
- Broward College
- Barry University
- Brown University planning

Key Takeaways:
- Staggered implementation
- People: implementation team, backfill, partners
- Project Plan
- Change management and training: critical to success
- Clean data
- Roles and security
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<tr>
<th>Area</th>
<th>Scope</th>
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<tbody>
<tr>
<td>Accounting</td>
<td>Accounting, Financial Data Model, capital assets, construction, endowments, revenues, receivables, debt, accounting policies</td>
</tr>
<tr>
<td>P2P</td>
<td>Procurement actions and policies, purchasing cards, treasury functions related to settlement, vendor management, accounts payable, integrations with McKesson, data conversions, ad hoc payments</td>
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<tr>
<td>Travel &amp; Expense</td>
<td>Employee travel and expense reimbursements and policies, travel and expense reimbursements for visitors/non-employees, travel card</td>
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<td>Reporting</td>
<td>Dashboards, executive reports, medical enterprise reports, regulatory reports, standard reports, shadow systems, longitudinal reporting</td>
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<td>Budget Execution</td>
<td>Execution (spend) of budget that is passed from Tidemark, budget vs. actual reporting, commitment control, spend authorizations</td>
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<td>Grants</td>
<td>Post award grants administration and compliance</td>
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Planned Summer Activities

Implementation Partner interviews and selection

Implementation planning:
• Financial Data Model
• Business process inventory
• Data cleanup and validation
• Implementation team, strategy, and timing
• Commitment of backfill/front fill
Completed
- Student bill improvements
- Payment application priority codes
- Mobile compatibility
- Student fee portal

Coming in September
- Third party billing
Human Resources and Payroll

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The Human Resources and Payroll partnership

- Recent responsibility changes
- HR Operations and Payroll team members
Human Resources will help you with the following:

- Hiring
  - Staff
    - Full time, Part time, Temporary
  - Faculty - in partnership with the College, the Graduate School of Arts and Science, and the Professional Schools
- Students
  - EPAF set-up and assistance
  - Graduate Students
Human Resources will help you with the following:

- Onboarding
  - Employment documentation (Form I-9)
- Promotions and Transfers
- Faculty and Staff Changes
- Additional Compensation
- Exits
Receive the help that you need

- Contact Human Resources
  - 336-758-4700
  - AskHR@wfu.edu
- Work with your HR Partner
- Access forms on the HR Site
  - hr.wfu.edu/forms-and-documents/
Payroll will help you with the following:

- NOVAtime
- Direct Deposit
- Tax Forms: W-4/NC-4
- Payroll Deadlines
- Pay Statement/W-2 Questions
Receive the help that you need

- Contact Payroll
  - 336-758-2960
  - payroll@wfu.edu
Your input is essential as we continue to collaborate and discuss items of interest so that we can improve how we do business at Wake. So, please continue to send along suggestions, questions, and topics you want to hear about, know about, or discuss with others.

See you in the Fall!!