

**Business Affairs  
Annual Report  
2008-2009**

## **Finance**

### **Executive Summary**

#### Special Projects:

- EAGLE - Statewide Internal Control Project
  - Performed Financial Risk Assessment,
  - Documented Internal Controls for over 100 processes through the use of narratives and flowcharts
  
- UNC FIT - Financial Improvement Transformation Project
  - Provided both leadership and key supporting roles in the development of standards for the UNC campuses in the areas of Accounting, Financial Reporting, and Contracts & Grants.
  - This included site visits to some UNC campuses to assist in assessment and in implementation of standards and checklists.
  
- Banner Human Resources System Implementation
  - Played a number of key roles in the implementation of a very complex HR System, which included innovations, the re-engineering of a number of processes, and continued improvements post go-live.
  - Developed and implemented intricate security over the new system including masking of sensitive data.
  - Developed User Handbook and Training Materials and Trained the Campus to use the new system.
  - Provided better access to HR, Position, and Payroll information for the campus.
  - Each payroll has been processed in a timely and accurate manner, through significant overtime and due diligence by the Payroll Department.
  - Mandated direct deposit for all employees, including students.
  
- Banner Upgrade to Version 8
  - Managed the major upgrade to the Banner ERP system and related interfaces and tools, including the coordination of testing in all environments, verification of reporting, and process changes.
  - This included the rewrite of the Handbook for changes in Electronic Personnel forms and training.

- Coordinated the implementation of multiple year encumbering which will go-live in July.
- Issuance of Bonds
  - Issued approximately \$30 million in new long term debt at a Good Rate.
  - Refinance approximately \$4 million of old bonds at a savings of over \$300,000.
- Other
  - Red Flags Rule - Developed Identify Theft Prevention Program that was approved by Board of Trustees.
  - Accounts Payable Overpayments Audit - Completed bonieac audit with no overpayments.

#### Accounting Services:

- Clean Audit with No Audit Findings
- Met all external and internal financial reporting and regulatory deadlines
- Exemplary Cash Management during current economic crisis
- Trained staff of sister UNC campuses on the dual chart process for year-end accrual and reporting
- Outsourced handling of Student Credit Card Payments with a savings of approximately \$250,000
- Implemented electronic student bills, direct deposit of student refunds, and student account center

#### Financial Planning & Budgets:

- Coordinated exceptions to state budget restrictions during current economic crisis
- Created Budget Central webpage to keep campus informed during current economic crisis
- Coordinated biennial budget process including results based budgeting
- Prepared a number of analyses and annual budget reports

#### Contracts & Grants

- Facilities & Administrative Rate Proposal
- Worked with UNC GA to secure a convenience contract for the development of F&A Rate Proposals.
- Initiated the F&A Rate Proposal Project for UNCG including the Space Survey.
  - Trained Faculty and Departmental Staff on systems and fiscal management of sponsored programs
  - Coordinated the organization of a Research Administrators network at the school level

#### Technology, Systems & Procedures

- Coordinated and Conducted Training for Banner Finance and Banner HR Systems

- Served on a number of Administrative Systems Committees and Chaired Security Committee
- Helped develop a new disaster recovery process for payroll, vendor payment, and student A/R
- Coordinated 1099 processing including consolidation of P-card transaction data and transmission
- Provided technical support for new check reconciliation process for all checks
- Coordinated calendar year-end activities for new HR system, including W-2s
- Established procedures for implementing a late year pay cut and furlough tracking
- Played a key role in responding to possible security breach
- Systems Tools
  - e-Print - assisted in move of report distribution system to a virtual server for future savings
  - ODS and WebFocus - began implementation of new security model for database and reporting tool
  - Workflow - Served as administrator and coordinated automation of e-mails for electronic personnel action
- Authored/prepared a number of reports and coordinated the preparation of the Fiscal Profile

## **Foundation Finance**

### **Executive Summary**

- An unqualified opinion from McGladrey & Pullen for all six entities.
- Inventory of Weatherspoon Arts Foundation with no findings.
- Implemented remote deposit and on-line banking. This provides more efficient use of staff's time.
- Participated in Eagle project as it pertains to Foundations.
- Continue to work with Boards to provide reporting for the Treasurers of the associated entities. Weatherspoon and HES budget staff now have access to funds through Genie in addition to quarterly reporting.
- Continue to work with University Advancement to assure that gifts are recorded correctly.
- Susan rewrote the process for calculating the fund balances for 13<sup>th</sup> month processing so that there is consistency across the foundations and UNCG.
- Began testing for implementation of Banner's endowment module.
- Continued to provide financial reporting as well as accounts payable and receivable services for all associated entities.

### **Institutional Effectiveness**

- Foundation Finance staff implemented remote deposit and on-line banking. This provides more efficient use of staff's time by eliminating trips to the bank and allowing daily access to accounts if needed.
- Susan rewrote the process for calculating the fund balances for 13<sup>th</sup> month processing so that there is consistency across the foundations and UNCG which will create less questions from auditors.
- Began testing for implementation of Banner's endowment module.

## Facilities

### Executive Summary

- Customer Service - Initiated a "Remarkable Customer Service" program in Facilities. Created a "Customer Relations and Assessment" function in Facilities Operations. Established a Customer Service Advisory Group. Initiated on line publication of a project status report for small renovations. Enhanced Facilities role in the university's new employment orientation program. Completed two customer service surveys.
- Innovation - Completed the Energy Savings Contract project. Implemented housekeeping workload software to assist in improving productivity. Facilities Services implemented a "Green Cleaning Program". Implemented electronic card access in 10 buildings and in 42 IT closets. Connected all buildings with DDC controls to a central management system that issues alarms to technicians in case of malfunctions. Implemented notification to customers when work orders are completed using technician's wireless PDA.
- Stewardship - Completed renovations to Alumni Building and the Forney Building, capping completion of the Higher Education Bond program. Continued implementation of the university's capital improvement and repair and renovations program including: installation of fire alarm and fire suppression systems, roof replacements, underground steam replacement, construction of the School of Education building, design of the JSNN, and a number of other projects. Implemented programming of building controls setbacks in order to conserve energy. Reduced consumption of energy per gross square feet by 11% from 2002-03 baseline. Reduced water consumption per gross square feet by 63% from 2002-03 baseline. Conducted campus wide "Shred-a-Ton" disposing of 12 tons of records. Completed numerous landscaping improvements enhancing the appearance of campus. Recycled 33.5% by weight of total campus waste.
- Community engagement - Partnered with school system, community college, state agencies, and nonprofit organizations in a number of initiatives. Co sponsored the HUB Contractor Business Academy. Visited with local design firms to explore potential partnership opportunities. A full time HUB coordinator position was recruited to lead university efforts in increasing participation of HUB contractors in the new university's construction program. As of April 2009, HUB participation is:
  - UNCG's Project Total Cost: \$219,075,509
  - UNCG's Project Total HUB: \$25,315,732 OR 11.6% participation
- Engagement with university community - Facilities staff participated in the Staff Senate and the Inclusive Community Task Force, and university Health and Wellness

committee. Sustainability Manager co-chaired a 40 person campus sustainability committee. Environmental Educator provided over 40 environmental conservation training seminars. Project Office partnered with Geography department in enhancing Facilities GIS data.

- Engagement in professional organizations - Staff attended trade and professional conferences. Grounds supervisor served as past president for Professional Grounds Management Society. HUB coordinator is a member of the North Carolina MWBE Coordinators Network. Staff made presentations at the SRAPPA conference, North Carolina State Construction Conference, and the North Carolina State Building Commission.
- Staff development - Facilities has now 8 LEED accredited professionals. Four supervisors are Certified Executive Housekeepers. Two supervisors completed the “Supervisor Tool Kit program” offered by APPA. One project manager completed an undergraduate degree in engineering.
- Staff Wellbeing - Celebrated Housekeeping week in September 2009. Celebrated completion of the Higher Education bond program in April 2009. Celebrated Safety day in May 2009. Continue the employee recognition program in the Facilities Services area.

## **Human Resource Services**

### **Executive Summary**

**The Department of Human Resource Services** is dedicated to providing exemplary services through various programs including but not limited to: talent acquisition, training and development, benefits programs, position management, equal opportunity, affirmative action, records management, worker's compensation, and employee relations that will promote, enhance, challenge, and encourage all staff to work in an environment that stimulates creativity and dedication to service.

- Significant HRS Accomplishments 2008/2009:
  - Completion of the Career Banding SPA Classification Conversion Project: Began in June of 2003, completed on December 31, 2008. Finalized February 1, 2009. Converted 1340 Graded SPA positions to the Career Banding Classification System. UNCG was a mode for the state and UNC System in accomplishing this project. HRS participated in many high level workgroups and technical advisory committees in supporting and ensuring the success of this program. HRS hosted all three OSP Career Banding Statewide Conferences.
  - Conversion to Banner HR. This two year project was completed and went live on July 1, 2008. UNCG was the most successful with a go live of any UNC campus. This was due to the collaborative efforts of many campus units. HRS was complimented

many times by the UNCG project manager of Banner HR as supporting this effort more than 100%.

- Benefits Unit exceptionally professional handling of the many changes to NC statewide benefit programs including: 403B conversion process. Deb Carley served assisted the VP for HR at UNCGA in putting this effort together and hosted the statewide workshop for benefits managers; implementation of the mandated ORBIT retirement software program. Angela Montgomery was complimented by the retirement systems as implementing ORBIT with the least number of errors of any agency or university; dramatic change in the SHP based on cataclysmic deficits which resulted in new legislation to lower benefits and raise premiums. HRS was complimented for keeping the campus completely informed throughout this painful process.
- Exemplary growth in number and quality of HRS training and development programs. After years of “neglect” the HRS training function is now a credible entity with a large number of various training programs available to campus stakeholders and this number is increasing each year. HRS has finally been provided with sufficient support to professionalize this important program through the strong support of the VC for Business Affairs.
- Dramatic turn of events relating to unprecedented budget deficits has necessitated HRS management to totally review and revise all RIF related policies and procedures and be prepared to react to budget crisis issues such as furloughs, pay cuts, budget cuts resulting in unprecedented needs to reduce positions and potentially lay off large numbers of staff.
- AVC for HRS developed the first draft response to a section D of the UNC Tomorrow Phase II report regarding faculty and staff recruitment and retention and was a member of the committee that developed the UNCG Strategic Plan for 2009/2014.

### **Institutional Effectiveness**

The Department of Human Resource Services is dedicated to providing exemplary employee services through various programs including but not limited to: recruitment, training and development, benefits programs, position management, equal opportunity, affirmative action, centralized records management, worker's compensation, and employee relations that will promote, enhance, challenge, and encourage all staff to work in an environment that stimulates creativity and dedication to service.

The key elements to superior service include tracking and analyzing the metrics associated with the HR division's daily operations to ensure professionalism and continuity in serving the HR needs of the organization, and adherence to the many and various regulatory elements mandated by federal, state and UNC GA statutes, administrative rules and policies and procedures. Following are the metrics utilized by HRS on an annual basis and goals related to the HRS regulatory based elements:

	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
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Human Resource Services					
Workers Compensation Claims	90	88	125	95	97
Cost of WC Claims	\$275,271.00	\$311,554.00	\$274,076.00	\$196,205.00	\$311,129.00
Total Benefits Actions	5,803				11,818
Email/Phone calls that required assistance	8,713				31,782
Total records actions which must be double entered into OSP's PMIS system	2,231				1,753*
Recruitment actions	8,565				25,885
Positions opened	271	240	238	346	344
Hits on job search web page	84,081	94,148	93,548	99,615	116,919
Participants in training programs	1,001	973	2,564	2,210	2,143
Total workshops offered	90	82	116	74	102
Classification/Compensation actions	575				360*
Employee relations actions	206				221
Grievances filed	5	1	5	2	3
Affirmative Action actions	513				533
Data entered for affirmative action	8,241	13,900	12,813	27,726	28,769
Employee loan fund requests	48				79
Amount loaned	\$20,915.00	\$23,050.00	\$21,975.00	\$25,975.00	\$38,650.00
*Career Banding has reduced the numbers					

Elements Human Resources that Relate to Institutional Effectiveness:

Regulatory Based Elements:

- Knowledge of state, federal, UNC and UNCG policies procedures, statutes and administrative regulations and ability to explain and promote in an understandable methodology to University stakeholders.
- Ensure the university and its stakeholder's human resource interests are protected in the federal and state regulatory arenas through consistent application of policies and procedures.

Service Based Elements:

- Provide customer service that is balanced and focused on positive outcomes.
- Assist the UNCG Administration in creating a culture of growth, high performance, and quality of work/life that is consistent with the Universities' vision for the next five years (2009 - 2014): "The University of North Carolina at Greensboro will redefine the public research university for the 21st century as an inclusive, collaborative, and responsive institution making a difference in the lives of students and the communities it serves."

Accomplishments:

### **Activity Related to Technology**

The Department of Human Resource Services is dedicated to providing exemplary employee services through various programs including but not limited to: recruitment, training and development, benefits programs, position management, equal opportunity, affirmative action, centralized records management, worker's compensation, and employee relations that will promote, enhance, challenge, and encourage all staff to work in an environment that stimulates creativity and dedication to service.

Cutting Edge Use of the latest technology is one of the key elements that HRS will use to provide superior service to all stake holders. Following are the goals of HRS' elements of technology:

Technology Based Elements:

- Implementation and robust use of integrated electronic HR systems and related subsystems and components
- Development and maintenance of a single electronic point of entry through integrated website
- Expansion of appropriate access to and ability to upgrade human resources data by departments and employees through use of web-based and other electronic interfaces

### **Administrative or Staff Support**

Human Based Elements:

- Adequate staffing of the HR function
- Continued professional development of HR employees
- HR Support, Advisory, and Liaison activities supported by campus constituents
- Assist the Chancellor and Vice Chancellor for Business Affairs and UNCG Administrative Staff in unleashing the human potential of those who serve the university community.

## **Auxiliary Services**

### **Executive Summary**

#### **Parking Operations & Campus Access Management**

- Student ridership on public transit (HEAT) rose by 42% over last year, indicating that alternative Campus Access Management efforts are successful. Further evidence is that for the third consecutive year there was a decrease in parking permit sales. Permit sales for 2008-2009 were down overall by 4.1%.

- Parking Operations in conjunction with Piedmont Authority for Regional Transportation (PART) developed routes with stops on the UNCG campus. PART has direct bus transportation from Randolph and Davidson County to UNCG with a convenient drop off/pickup at the Walker Avenue Library Circle. Monthly PART passes became available in the UNCG Parking Office as of September 08.

### **Property Acquisition & Leasing**

- A Consortium of local neighborhood representatives was formed to enhance the relationship with and between members of the communities near the University. The Consortium met once each semester as planned.
- Working with the NC Railroad, UNCG reached an agreement that will facilitate the University's use of all current and future property along the railroad corridor.
- UNCG worked with the City of Greensboro in improving both the Tate and Aycock Street railroad underpasses. The improvement process included cleaning, painting, lighting, and landscaping both locations.

### **UNCG Bookstore**

- The UNC General Administration mandated an 85% on-time faculty textbook adoptions rate for 2007-08. On-time adoptions allow the bookstore time to source used books for the following semester, thereby saving students money. It also affords the bookstore the opportunity to offer students more money during buyback. UNCG achieved the required 85% on-time adoption rate for the academic year 2008-09. This rate was achieved in part by designating a representative from Auxiliary Services to work in conjunction with the faculty and the UNCG Bookstore.
- ISBN numbers for required text are now provided to students when they click the link on UNCGenie when they register for courses or by accessing the UNCG Bookstore online. This affords students the opportunity to comparison shop for their textbooks.

### **UNCG Dining Services**

- In 2008-09, UNCG Dining Services served over 2.25 million customers, including 3,555 catered events.
- Catering implemented CaterTrax, an online catering management system, reducing their use of office paper by 45%.
- Dining Services implemented and continued numerous sustainable efforts.
- # The CAF is UNCG's all-you-care-to-eat board plan operation, which is designed to serve the residence hall students who have meal plans. The perceived value of this program can be measured in part by measuring the number of customers who frequent The CAF and pay cash or declining balance to enter (i.e. voluntary sales). This year, voluntary sales in The CAF grew by 21% over the prior year.

### **Vending**

- With the renewal of the Pepsi contract, machines across campus were replaced.

## **Institutional Effectiveness**

UNCG and GTA reached an agreement to extend the HEAT service. Students will have access to HEAT and GTA busses during the academic year and access to GTA busses during the summer. Faculty and staff will also have access. This is funded by a Transportation Fee.

UNCG extended their bookstore contract with Barnes and Noble. The contract states a 5% discount will be provided to UNCG students on required/recommended textbooks and course materials purchased through the UNCG Bookstore.

The UNCG Dining Contract was awarded on behalf of the University. This was the result of the formation of a Dining Contract Review Committee. The results of the Committee's evaluations were provided to the Vice Chancellor of Business Affairs and the Chancellor for their decision-making process.

## **Business Services**

### **Executive Summary**

- Implemented new Contract Management Review policy and procedures >\$5,000
- New forms for Independent Contractor status
- Online tutorials and flowcharts placed on the homepage
  
- Spartan Printing was the recipient of two Printing Industries of the Carolinas awards for Outstanding Printing in a Wide Format and Digital printing.
  
- Spartan Postal began using the new National Change of Address software. This checks addresses to assure that it's deliverable and current.
- Spartan Postal implemented a new service - when supplied with an address list from customer, we can run all envelopes and postcards in zip code order and now print the Intelligent Postal barcode on them.
- Postal Services went 'green' this year with the introduction of new GEM electric cars. These replaced gas vans.
  
- Currently implementing new id card transaction system - Blackboard Transact
- Held contest for re-designing the id card. A student won and their interpretation is shown with new design - Spartan Card
- Partnered with Wachovia to alter current contractual agreement for banking services for PCI compliance
  
- Supported the summer 2008 classroom chair desk replacement project - Surplus
- Sold surplus to 10 public and private school systems across the state.
- Implemented online surplus property disposal form.
- Installed barcode pricing and scanning for the retail surplus sale operation.

- Implemented new State guidelines on transfer of State property to agencies, non profits, and political subdivisions.
- Sold or disposed of all remaining Steelcase surplus items stored at Becher- Weaver . Fourteen tractor trailer loads inside as well as vehicles and equipment stored in the parking lot.
- PCWS Database Administration
- Revised Gift Card Policy and Procedures
- Added more editable PCard forms online
- Improved Warehouse bid station/kiosk
- Created a PCard Compliance Tracking Database
- Created Brochure & Captivates for PII Policies & Best Practices
- E-published Business Services Bulletin and Purchasing Podium e-newsletters
- Created online ASPX/Visual Web Form Development/Updates
  - o POCAM Special Events
  - o CarPool Club Redesign
  - o FirstCard Commuter Meal Plan
  - o BSV Leave Request System
  - o BAF Leave Request System
  - o Pace Idea Submission/Followup System
  - o Office Supply Request Form
  - o Intent to Cater Form – Pilot Program
  - o Systems & Procedures Project Request Form
  - o SpartanSwap Upgrades
  - o We Want our Blue & Gold merchant card and website
- Purchasing negotiated a new Preferred office supplies contract with Staples
- Voice over IP contract – State ITS >\$500,000
- Worked with Athletics and Collegiate Licensing Corporation to design a spirit day – came up with We Want our Blue & Gold Day. Website and Facebook page were created and put online. Visitors can download a card to give to merchants asking them to carry UNCG merchandise

### **Institutional Effectiveness**

- The University will ensure that a contract review process will be instituted. Purchasing implemented a new contract review procedure in response to the State Auditor management letter. The new procedure and policy applies to all potential contracts greater than \$5,000 in the current fiscal year. The university Internal Auditor performed a mid-year review and found the procedure to be in compliance with policy.
- Responding to the elimination of supported product and support for the current ID Card (chip), the First Card Center will explore new card solutions. Spartan Card Services

successfully implemented the Blackboard transaction module as the new campus identification system. It will be used to deliver convenient, secure, and efficient card-related services to students, faculty, and staff. The new system will allow cardholders online access to their card information, granting them the ability to add value to their accounts, receive online statements, and deactivate if lost or stolen. The system integrates with the existing Blackboard Academic system thus providing students a single point of entry for card related services. The new system replaces the smart card system which was no longer supported.

## **Safety and Emergency Management**

### **Executive Summary**

- Office of Safety and Emergency Management - Goal for 08-09 was to research, develop, and implement the Office of Emergency Management for the University. With the Emergency manager in place we were able to develop our emergency management program based off the Emergency Management Accreditation Program (EMAP) and NFPA 1600 standard. We are able to ensure that the university emergency operations plan meets the criteria of the National Incident Management System (NIMS). We were able to provide training to new employees during New Employee Orientation on the notification and communication systems, as well as emergency preparedness, at UNCG. He was able to provide printed materials for campus community members and University departments that give information on actions to take during emergencies. These and many other items were completed by the new Emergency Manager.
- Public Safety and Police - Goal for 08-09 was to expand the K-9 program by adding another dog to increase the availability and effectiveness of the K-9 program. The K-9 Program at UNCG has been very successful in both criminal apprehension and public relations in its' first year. In the first full year the K-9 unit (1 dog) was utilized over 350 times and responsible for 83 arrests and the recovery of 5 weapons on campus. The unit was also recognized by the Greensboro City Council for assisting the city police during their pursuit of a felon near campus, (tracking). The K-9 Unit recovered enough in drug seizures to finance the cost of the program for its first year.
- Office of Safety - Goal for 08-09 was to complete Campus Facility Asbestos Survey using AHERA protocol. Outcome includes an internet based database of findings, accessible to Facilities, Housing, and Auxiliary's staffs. This data base was recognized by the American Council of Engineering companies of North Carolina with its 2009 Engineering Excellence award.
- Public Safety and Police - Goal for 08-09 was to have one police building. Due to operational inefficiencies caused by the Police Department being spread across four locations up to three miles apart, the Department needs to have all functions located in a single building. This was not accomplished

## **Enterprise Administrative Applications**

### **Executive Summary**

FY2008-09 was a productive year for Enterprise Administrative Applications; I'd like to commend all the members of the multitude of cross-divisional governance and task groups that contributed to the many accomplishments listed below:

- Guided and supported project team members to complete Banner Human Resources module post-implementation tasks. At July 1 we brought the Banner Human Resources module fully-online, resulting in multiple efficiencies including electronic forms to support hiring and other personnel actions, decentralization of time and leave entry, and on-line delivery of monthly pay stubs, leave balances and other relevant information.
- Expanded the role of administrative system governance groups and strengthened their cohesiveness:
  - Through the cross-divisional Data Standards Committee, implemented data standards and business processes resulting in greater understanding and consistency in the use of Banner data, reduced rework due to input errors, and increased data integrity.
  - Through the cross-divisional Administrative Systems Security Committee, implemented additional features in Banner (such as data masking and ORG security) resulting in enhanced security of UNCG's major enterprise system.
  - Through the cross-divisional Administrative Systems Users Group, enhanced planning to include scheduling upgrades and enhancements into the most feasible windows of opportunity, resulting in less interruption of business processes for system maintenance.
  - Through the cross-divisional Administrative Systems Committee, developed and piloted a new fiscal-year-based planning process including estimates for requested projects, resulting in enhanced specificity and commitment to a feasible number of system projects to occur during the course of the upcoming fiscal year.
  - Through the cross-divisional Administrative Systems Technology Group, research and recommended optimal approaches for enterprise system upgrades, resulting in smoother transitions to new versions of these applications.
  - Supported replacement of in-house Student Data Warehouse with reporting dashboards, increasing access by users to meaningful and relevant reports to support operations without requiring heavy technical expertise. In addition, advocated for the expansion of this concept to other divisions and areas to streamline operations, support data-driven decision-making, and provide strategic opportunities to use the rich set of data existent within UNCG's major enterprise system, Banner.
  - Served as Client Sponsor for the Banner 8 upgrade and the ODS upgrade projects.
  - Served as Client Sponsor for the Enterprise Document Imaging evaluation and selection project.
  - Co-sponsored, with ITS, a project to determine campus-wide future Banner environment needs.
  - Co-sponsored, with ITS, a project to determine campus-wide future reporting needs.

- Provided oversight to a project designed to align access to social security numbers via Banner forms with University-approved reasons to collect and use this information.
- Co-sponsored, with ITS, a project to define requirements for an initial set of services provided through a future identity management system.
- Worked with ITS to identify value-added activities by project managers to improve project management.

In addition, I personally participated in the following during FY2008-09:

- Served on the Strategic Planning Committee, the Transparency workgroup, and as the liaison from the Transparency workgroup to the Educational and Leadership workgroup.
- Served on the Institutional Effectiveness Committee and annual report sub-committee.
- Served as founder and chief organizer of the first annual UNC HR Systems Conference; the first UNC-wide conference was attended by over 120 UNC employees state-wide at ASU in September of 2008.
- Participated in the American Association of University Women's IT Awareness initiative for high school girls in North Carolina.
- Launched a UNCG Banner HR Users Group to ensure continuing process review and improvement of cross-office and cross-divisional business processes in HR, payroll, budget and other affected offices.
- Attended a Gartner Identity & Access Management conference in November 2008 (related to UNCG's Identity and Access Management multi-year initiative).
- Attended a NACUBO-sponsored Baldrige assessment methodology workshop in October of 2008
- Convened and/or participated in several cross-divisional task forces, resulting in more efficient approaches to ensuring compliance with various mandates to the University (i.e., Identity Protection, SSN Access through Banner Forms, PCI, etc.)

### **Institutional Effectiveness**

- Brought the Banner Human Resources module fully-online, resulting in multiple efficiencies including electronic forms to support hiring and other personnel actions, decentralization of time and leave entry, and on-line delivery of monthly pay stubs, leave balances and other relevant information.
- Supported replacement of in-house Student Data Warehouse with reporting dashboards, increasing access by users to meaningful and relevant reports to support operations without requiring heavy technical expertise. In addition, advocated for the expansion of this concept to other divisions and areas to streamline operations, support data-driven decision-making, and provide strategic opportunities to use the rich set of data existent within UNCG's major enterprise system, Banner.
- Through the cross-divisional Data Standards Committee, implemented data standards and business processes resulting in greater understanding and consistency in the use of Banner data, reduced rework due to input errors, and increased data integrity.
- Through the cross-divisional Administrative Systems Security Committee, implemented additional features in Banner (such as data masking and ORG security) resulting in enhanced security of UNCG's major enterprise system.

- Through the cross-divisional Administrative Systems Users Group, enhanced planning to include scheduling upgrades and enhancements into the most feasible windows of opportunity, resulting in less interruption of business processes for system maintenance.
- Through the cross-divisional Administrative Systems Committee, piloted a new fiscal-year-based planning process including estimates for requested projects, resulting in enhanced specificity and commitment to a feasible number of system projects to occur during the course of the upcoming fiscal year.
- Through the cross-divisional Administrative Systems Technology Group, research and recommended optimal approaches for enterprise system upgrades, resulting in smoother transitions to new versions of these applications.
- Convened and/or participated in several cross-divisional task forces, resulting in more efficient approaches to ensuring compliance with various mandates to the University (i.e., Identity Protection, SSN Access through Banner Forms, PCI, etc.)

### **Activity Related to Technology**

- Guided and supported project team members to complete Banner Human Resources module post-implementation tasks.
- Expanded the role of administrative system governance groups (Administrative Systems Users Group, Administrative Systems Security Committee, Data Standards Committee, Administrative Systems Technology Group) and strengthened their cohesiveness.
- Worked with ITS to formulate a new method for prioritization of enterprise administrative applications which will be piloted for FY2009-2010.
- Served as Client Sponsor for the Banner 8 upgrade and the ODS upgrade projects.
- Served as Client Sponsor for the Enterprise Document Imaging evaluation and selection project.
- Co-sponsored, with ITS, a project to determine campus-wide future Banner environment needs.
- Co-sponsored, with ITS, a project to determine campus-wide future reporting needs.
- Provided oversight to a project designed to align access to social security numbers via Banner forms with University-approved reasons to collect and use this information.
- Co-sponsored, with ITS, a project to define requirements for an initial set of services provided through a future identity management system.
- Worked with ITS to identify value-added activities by project managers to improve project management.

### **Administrative Staff Support**

- Served on the Strategic Planning Committee, the Transparency workgroup, and as the liaison from the Transparency workgroup to the Educational and Leadership workgroup.
- Served on the Institutional Effectiveness Committee and annual report sub-committee.
- Served as founder and chief organizer of the first annual UNC HR Systems Conference; the first UNC-wide conference was attended by almost 200 UNC employees state-wide at ASU in September of 2008.

- Participated in the American Association of University Women's IT Awareness initiative for high school girls in North Carolina.
- Launched a UNCG Banner HR Users Group to ensure continuing process review and improvement of cross-office and cross-divisional business processes in HR, payroll, budget and other affected offices.
- Attended a Gartner Identity & Access Management conference in November 2008 (related to UNCG's Identity and Access Management multi-year initiative).
- Attended a NACUBO-sponsored Baldrige assessment methodology workshop in October of 2008.