

# Welcome to *In Focus!*

The University of Missouri System  
Finance & Administration quarterly newsletter



Vice President Krawitz

How we accomplish our jobs is as important as the jobs themselves. This quarter's InFocus newsletter is highlighting being Innovative yet Consistent. We value **Consistency** by delivering on our promises and performing our work reliably time and time again. We engage the creative energy of our staff in developing **Innovative** solutions to better serve our customers and stakeholders.

- [Spotlight on Office of Planning and Budget](#) - The group that Consistently has its fingers on the pulse of University spending, and every year finds Innovative ways of balancing the budget. Learn more about this office within Finance & Administration.
- [Account-Ability](#) - "Counting on you to Count!" - It's inventory time again. A huge thanks to everyone involved with the semi-annual inventory of all equipment and plant assets required by federal law. These inventories also keep the University eligible for funding thru numerous agencies!
- [Risky Business](#) - "CRASH! Do you know what to do after an accident in a University vehicle?" - UM Risk & Insurance Management has created an innovative wallet card for those who drive University vehicles. A new way to make sure you are can be consistent with University policy during the stress of a vehicle accident.
- [On the Drawing Board](#) **\*\*NEW\*\*** - This new column will feature current University projects in the design phase with UM Facilities Planning and Development. This month, the UMHC Orthopaedic Institute is "On the Drawing Board".
- [Hats Off](#) - To University employees who have given Exceptional Customer Service that assists Finance & Administration achieve our goals. Check out those award winners!

The goal of the newsletter is to enhance our customer service by providing information that will support the work that you do for the university. As always, we welcome your feedback and your contributions.

- **Natalie "Nikki" Krawitz**

*Vice President for Finance & Administration*



## Spotlight

### Office of Planning and Budget



The University of Missouri System Office of Planning and Budget is a partner and advocate for the effective use of University resources through planning, analysis, accountability, and alignment of resources to priorities. The Office of Planning and Budget has four primary functions. We serve as the liaison office with the Missouri Department of Higher Education and the legislature and prepare the appropriations request for operations. We staff the budget planning and development work of the Board of Curators and senior administration of the University and provide support and guidance to the campus budget offices. We also serve as the system administration budget office. We work closely with the campus budget and accounting offices and other offices within system administration.

We offer responsive feedback and take all requests seriously. Our mission is to collect, analyze, and interpret data appropriately in a timely manner to create a foundation for policy and decision-making. Although we are a small unit we strive to develop a well-integrated, critical thinking group of people who can work in a fast paced, high volume, detail oriented environment. The Planning and Budget vision is to be viewed as the preferred value added unit providing consulting services on financial matters and their resulting budget implications.

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This is a very busy time of year for the Office of Planning and Budget. We are in the midst of budget planning and building for FY 2009 and are working on the appropriations request for FY 2010. Summary budget plans for FY 2009 will go to the Board for approval at their June meeting. We receive information and assistance from many of you as we prepare these items. Thank you all for your wonderful cooperation and support.

Our budgets are important not only as management tools to help ensure appropriate allocation and effective utilization of University resources, but they also help us tell about our priorities and how our resources are used. It is important for the University's message to be Consistent as we describe our expected financial needs and priorities to our various constituencies. Management's decisions and priorities as described by the budget should be Consistent with our publicly state priorities and needs. At the same time, it is important that we be Innovative in the presentation of our budget so that understanding of the University's needs is enhanced and clear to our various constituency groups.



## WISDOM'S CORNER

Featuring Challenging and Inspiring Thoughts

### **Being a Person of Influence: Its Starts with Integrity**

Integrity is your best friend. And it's also one of the best friends that your friends, colleagues, and associates will ever have. When people around you know that you're a person of integrity, they know that you want to influence them because of the opportunity to add value to their lives or to what they want to achieve. They don't have to worry about your motives. They know that you have their best interest in mind.

A cartoon published several years ago in the New York Times illustrates how difficult it can be to sort out another person's motives. Some hogs were assembled for a feeding, and a farmer was filling their feed trough to the brim. One hog turned to the others and asked, "Have you ever wondered why he's so good to us?" A person of integrity influences others because he or she wants to bring something to the table that will benefit them - not put them on the table to benefit himself or herself.

The road of integrity may not be the easiest path to follow, but if you want to be a person of influence, it's the only one that will get you where you ultimately want to go. And remember this:

*Many succeed momentarily by what they know;  
Some succeed temporarily by what they do; but  
Few succeed permanently by who they are.  
(Source: John Maxwell)*





## Account-ability

### Counting on you to Count!


Twice a year the University is required to complete a physical inventory of all equipment and other plant assets. Each fiscal office will receive the inventory reports in early April. The completion and return of this report by the deadline is crucial to meeting the University's federal compliance and external reporting requirements. For details see the [Business Policy Manual BPM-407](#).



## Risky Business

### CRASH! Do you know what to do after an accident in a University Vehicle?

If you drive a University vehicle, download your own [innovative wallet guide](#) to print and take with you (print with the double sided option). In the stress after an accident, it's good to know exactly what to do!

Auto Claim Checklist	<p>Curators of the University of Missouri/ Self Insured Claims Administrator—CCMI 800-449-2264</p>  <ul style="list-style-type: none"> <li>• Call the police and request assistance.</li> <li>• Obtain the names, addresses and phone numbers, both day and night, of all parties, <b>including witnesses.</b></li> <li>• Note the year, make and model of other vehicle(s) involved.</li> <li>• Note the location of accident and nearest intersections.</li> <li>• If you or another employee is injured, secure medical attention immediately. <small>See other side</small></li> </ul>
Auto Claim Checklist	<ul style="list-style-type: none"> <li>• <b>Never make a commitment nor admit liability!</b> Simply obtain the facts as given you regarding the situation and advise the other party that the incident will be reported to your company for immediate action.</li> <li>• Do not talk to anyone about the accident, except: <ul style="list-style-type: none"> <li>• Your campus auto claim coordinator</li> <li>• The responding police</li> <li>• The University insurance claims adjuster—Corporate Claims Management, Inc</li> </ul> </li> <li>• If required by law, make an oral report of this accident to proper police authorities, but do not give or sign any statements.</li> </ul>

All University vehicles are covered under the name "The Curators of the University of Missouri" as self-insured for automobile liability coverage. The self-insured Automobile Liability program provides coverage for bodily injury or property damage liability arising out of the operation of

use of university-owned or operated vehicles. All University officers, agents, employees, authorized volunteers and authorized students are covered under this program.

Any employee involved in an auto accident should contact their campus representative:

Columbia	Pat Higgins	(573) 882-7254
Kansas City	Peter Maxwell	(816) 235-5357
Rolla	Jamie Feldhacker	(573) 341-4800
St. Louis	Gloria Leonard	(314) 516-5362
UMHC	Betty Wilson	(573) 875-9082
MRC	David Poteet	(417) 461-5217
System	Risk & Ins. Mgmt.	(573) 882-8100

or Corporate Claims Management Inc (our third party claims adjusters) at (800) 440-2264 for assistance in filing a claim.

As soon as possible, complete the Vehicle Accident Report, [UM-5](#), available on our website at [www.umsystem.edu/rim](http://www.umsystem.edu/rim). Any letters, bills, suit papers, etc. should be forwarded promptly to your campus auto claims coordinator.

Drive Safe!



## On the Drawing Board!

**Current University Projects in Design**

**The University of Missouri Health Care Orthopedics Institute**



The new Orthopaedics Institute for the University of Missouri Health Care (UMHC) is planned for the corner of Monk and Stadium Drive in Columbia. Construction of the Institute should be completed by December 2009.

The Orthopaedics Institute will provide new clinical, surgical, and patient care spaces to alleviate the shortage of existing facilities in the University Hospital. The Institute has been designed as an easily accessible patient destination while providing efficient clinical and surgical service areas.

The design will include the necessary features and documentation for certification of the project under the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) program. As part of the UMHC commitment to care, hospital leadership and School of Medicine faculty made it a goal to incorporate sustainable features into the project.

The design is being prepared by Cannon Design, St. Louis, Missouri. The Project Team is under the direction of Clarissa Easton, UMHC Chief Facilities Officer and includes Larry Eisenberg, University Architect with UM Facilities Planning & Development.



## News & Updates

### ► Office of the Controller

#### **New Director of Financial Reporting and Taxation**



In March, Sharron Walker joined the Office of Controller as the Director of Financial Reporting & Taxation. Sharron began her career at the Missouri State Auditor's office, and then worked in state audit offices in Oregon and Arizona before returning to Missouri. Much of her career has emphasized education finance and accountability, with her most recent experience in creating the Division of School Audits in Arizona. As a CPA and a Certified Fraud Examiner, Sharron's varied background includes financial accounting, information systems, fraud investigations, and performance audits, which emphasize the efficient, economical, and effective use of resources.

Sharron will be working with the accounting offices across the system to produce the University's consolidated Annual Financial Report, as well as other internal and external reporting requirements including the detailed financial reports for each business unit. In addition, Sharron is responsible for meeting other audit requirements that occur throughout the year, including audits of the campus radio stations and NCAA agreed-upon procedures.

Please join us in welcoming Sharron to our team!

**New Director of Financial Compliance Training!**



Ericka F. Kranitz recently joined the Office of the Controller team in January from North Carolina State University in Raleigh. Ericka was the Director of Internal Audit for the University and also an adjunct instructor in both the departments of Accounting and Public Administration. Arriving at the University of Missouri was a bit of a homecoming as she has both her bachelor and master in accounting degrees from UMKC. Her professional experience (Chiquita Brands International in Cincinnati, and at Hoescht Marion Rousell and Ernst & Young, LLP in KC) has focused on best practices for internal auditing and accounting education.

Ericka's job is to provide an overview of the current financial compliance status on all four campuses and system, and collaborate and partner with each to identify, develop, and deliver effective training. Federal and State funding can depend on how well each of us comply with established guidelines - in purchasing supplies, recording payroll hours, and cash management. So to keep those grants and other monies coming in, we all need to make sure we understand and follow acceptable procedures.

Please join us in welcoming Ericka to our team!

**Financial Compliance - Show Me the Money!**

**What does this mean?**



**Truly, this catch phrase is what Financial Compliance is all about. If the University doesn't follow proper policies and procedures, we**

**don't get any more money! Financial Compliance is ensuring the University is following established guidelines, regulations, and other rules for how we receive and use resources. For example, we need to make sure we are properly accounting for and spending state and federal monies. This is challenging as these rules are not only complex, but they frequently change.**

**What are the characteristics of a good training program?**

To be effective, a training program should be:

1. Available and delivered timely
2. Targeted to its audience (management, principal investigators, fiscal officers)
3. Available in different forms to meet various schedules and learning styles; using new innovations where available
4. Consistent in the delivery of its message
5. Continually re-evaluated and updated to reflect current information

**What are some examples of training programs being developed?**

- Orientation for new employees who have financial responsibilities such as accounts payable, capital assets, and cash management.
- Orientation for new employees who are responsible for administering sponsored programs.
- Compliance overview for new faculty and principal investigators to understand the administrative requirements for managing a federal award.
- Understanding of the requirements for effort verification reporting (EVR) for principal investigators working on federally sponsored research.
- Understanding the requirements for allowable costs and cost transfers related to the research activities from federal awards.

## ► **Management Services**

**We've Moved!**



In January, the departments of Management Services, UM Business Services, Minority Business Development, UM Procurement, and Risk & Insurance Management moved into the Old Alumni Center at 1105 Carrie Francke Drive in Columbia. Although our physical address has changed, all other contact information is the same (telephone, fax, e-mail, etc.).



As part of the UM System space reorganization, UMC Procurement moved from this location to the Heinkel Building in November. In December, UM Procurement moved into the front offices. Then the rest of the groups joined in January from University Hall and the Hearnes Center.

The Division of Management Services encompasses 6 departments, 4 of which are now together. As caretakers of University stored files, Records Management's location at 2910 LeMone Industrial Boulevard will not change. Facilities Planning & Development is currently occupying "swing" space until a permanent location can be found. Moving 4 of the 6 departments within the division is an innovative way to address the space crunch in Columbia for both System and Campus space - and yet remain consistent in our service to our customer base.

## ► **Minority Business Development**

**Outstanding Contribution to the State of Missouri**



The inaugural 2008 First Lady Awards were presented on March 4, 2008 by First Lady Melanie Blunt in honor of Missouri women who are making history. Our own Dr. Jacqueline Kelly, the Director of Minority Business Development, was nominated in two of the five categories: Business & Innovation and Education.

President Forsee sent his personal congratulations to Dr. Kelly in a letter which states in part: "Your hard work speaks to the enthusiasm and dedication you apply to your job, and your efforts do not go unnoticed. Please accept my personal thanks and admiration for a job well done."

All of us also heartily congratulate Dr. Kelly on this marvelous recognition and thank her for being such a fine ambassador for Finance & Administration and the University as a whole.

## ► **Procurement Services**

**\$2 million already saved thru Show-Me Shop!!**



With over 600 University staff now trained to use the UM eProcurement system "Show-Me Shop" and the number of orders placed increasing at an average of 40% each month, the University has seen a product cost savings of over \$2 million so far! This is **real** money saved by departments as a result of the ePro program.

Cost savings are not the only benefit to the eProcurement program.

Cost savings are not the only benefit to the eProcurement program. Log on to Procurement's website to read more about the program and its benefits:

<http://www.umsystem.edu/ums/departments/fa/management/procurement/apps/eipro>

eProcurement is an innovative program designed to provide a virtual market place, which we call Show-Me Shop, for the ordering needs of University employees. There are many suppliers which the University does business with on a consistent basis. Procurement Services has negotiated or in many cases re-negotiated contracts with these vendors and have made them a part of the Show-Me Shop on-line catalog buying option. The Show-Me Shop currently offers access to 14 of the most commonly used vendor catalogs. Items include, but are not limited to, office supplies, scientific supplies, and computer equipment.

Vendors are excited about becoming a supplier available to our users through Show-Me Shop. The Procurement Commodity Specialists have started with the next round of supplier enablement. Soon there will be more vendors available on-line. If you purchase supplies, you can save your department a lot of money by using Show-Me Shop! Contact your campus Procurement Office to get access thru PeopleSoft to this wonderful ePro market place. We want you to become a part of this innovative program so you can realize the benefits that are being offered!



## ► Hats Off!

### Hats Off Award Winners!

The HATS OFF AWARD is the recognition from F & A to those who have made an Exceptional Customer Service Contribution to the University of Missouri, specifically in the facilitation F & A objectives. We thank the following people for doing their jobs ... and then some!

## Hats Off Award Winners

**Nominee/  
Position/  
Department**

**Nominator/  
Date**

**Reason**



**Susan Potrafka**  
 Manager  
 Missouri S&T Campus  
 Procurement Services

Willie Jones  
*Records  
 Management  
 Analyst at UM  
 Records  
 Management*  
 10/30/07

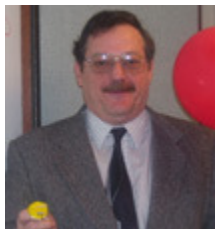
Willie Jones nominated Susan after his visit to Rolla in which he was to meet with several departments regarding Emergency Management. Susan took the time to introduce Willie to new staff with Environmental Health & Safety and then with the Police Department. Willie said, "'My Hat' is off to this team player ..."



**Memoree Bradley**  
 Secretary to the Vice  
 President  
 Finance &  
 Administration

Hannah Lenon  
*Office Support Staff  
 III*  
 1/18/08

When a consulting group came in, Hannah nominated Memoree for the work that she did over and above the call of duty. Hannah recognized that Memoree "... organized meetings, set up lunches, arranged conference calls (sometimes on very short notice), helped troubleshoot technology problems, and coordinated almost every instance of the group meeting on campus or University Hall. She's taken on a lot of extra work, had to work late, and done it with competence and professionalism." Hats Off to Memoree for her outstanding service and for exemplifying the service standards that we all embrace!!



**Bob Mullen**  
 Associate Director  
 Institutional Research

Mardy Eimers  
*Director of  
 Institutional  
 Research*  
 3/28/08

Mardy's nomination was prompted when Bob received kudos from David Crain, Director of IT Systems and Operations Support. David worked with Bob on a 3-day meeting and wrote that Bob "... was invaluable in helping build consensus and working toward appropriate solutions."



**Karen Borgers**  
 Executive Assistant  
 Office of the Treasurer

Nikki Krawitz  
*Vice President for  
 Finance &  
 Administration*  
 3/20/08

"Hats Off" to Karen Borgers, executive assistant to the Treasurer and Brian McNamee, manager of investments, for providing "SUPERB" customer service in pulling together the Report on Endowments to Senators Grassley and Baucus. While this project was a team effort and required the contributions of many, Karen and Brian went over the top in their contributions! Their efforts exemplify the spirit of teamwork, collaboration and excellence which we all embrace! Join me in extending a special thank you to both!



**Brian McNamee**

*Investment Manager*  
Office of the Treasurer



**Brenda  
Reifschneider**  
*Coordinator,  
eCommerce*  
UM Procurement  
Services

Jacqueline Kelly  
*Director of  
Minority Business  
Development*  
3/21/08

Jacqueline nomination was to give "Hats Off" to Brenda as she provides "... exceptional customer service ... for the Minority and Women-owned Expenditure report ..." and "... responded quickly and comprehensively to my requests for purchasing data for the Newsletters."

Each of us is vital to the success of the University. When you see someone making an Exceptional Contribution, let them know – you just might make their day!



## **Focus On: Answer**



### **UMSL Oak Hall**

Opening in 2006, this residence hall is on the South Campus and houses 285 of the 1,030 students on the UMSL campus.

Residence halls are an integral part of the campus community, but needs of today's students have changed. In Oak Hall, the 4 bedroom suits allow most students to have their own private bedroom. Additional amenities of the building include a heated outdoor pool, Oak Café, laundry facilities, game room, and much more! Also inside the common areas of Oak Hall, students have access to resources such as Health Services, counseling Services, and the Student solution Center. In the fall of 2007, themed living communities and "freshmen only" floors were introduced, bringing innovation to a consistent feature of campus life.



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