



# InFocus

A publication of the University of Missouri System  
Division of Finance and Administration

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## Welcome to InFocus!

As FY10 winds down, Finance & Administration is looking at this coming fiscal year and beyond in terms of our responsibilities to the University for its financial and physical assets. Focusing on the needs of our customers, we empower our employees to continue to strive to achieve **Operational Excellence** through continuous improvement, team work and proactive problem solving.

With the *teamwork* of the Office of the Treasurer, UM was named one of the [10 Best University Endowment Managers](#) by the National Association of College and Business Officers in February. Through *proactive problem solving*, we have been able to continue training University staff using the TelePresence in spite of the constraints on travel. We have strived for *continuous improvement* through the reorganization of Procurement Services and MUHC Sourcing & Supply Chain to a "Best Practices" organization structure. We have focused on our *customer's information needs* by providing data needed for the President's Accountability Measurement System. And, we have *empowered our employees* by providing Professional Development through low and no-cost means.

Although budget projections for FY11 and beyond continue to be challenging, you can count on Finance & Administration to strive for sustained improvement and excellence in fulfilling our responsibilities.

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*



Vice President Krawitz

## Account-Ability



### Medical Residents FICA Exception

*"IRS to Honor Medical Resident FICA Refund Claims"*

The IRS has made an administrative determination to accept the position that medical residents are excepted from FICA taxes for tax periods ending before April 1, 2005, when new IRS regulations went into effect.

## Spotlight On ...



### Risk & Insurance Management

#### *"Operational Excellence in a Risky World"*

The office of Risk & Insurance Management (RIM) protects the University's physical, financial, human, and reputational assets through the development and management of many insurance and self-insurance programs. The department strives for Operational Excellence in providing protection for all four campuses, the hospital and System.

## Learning, Growth and Development



### Professional Development

#### *"Professional Development Without Cost"*

How do you maintain Operational Excellence when there are limited funds to pursue Professional Development? Last year as part of their division strategic planning, Finance & Administration created the Learning, Growth, and Development Committee to look into low and no cost ways of pursuing professional development opportunities for staff. Read about what they're doing!

## Compliance Corner



### Training / Sponsored Programs

#### *"Financial Compliance Training Now Available"*

Financial Compliance is ensuring the University is following established guidelines, regulations, and other rules for how we receive and use resources. For example, it is important to make sure the University is properly accounting for and spending state and federal monies. If you are responsible for these types of monies, training is available on-line and through classroom sessions – read on!

## Risky Business



### Visitors in the Workplace

#### *"Hazardous Workplaces"*

The University is a diverse environment of classrooms, offices, and laboratories where many different activities are performed. Visitors to the workplace are generally welcome and in some settings even encouraged. However, appropriate precautions and limitations on visitation are necessary to protect health and safety, and to maintain productivity and regulatory compliance.

## On the Drawing Board



### Current University Projects in Design

#### ***"UMKC - New Student Union"***

Construction of the new Student Union at UMKC is nearing completion! In the past 10 years, the campus population at UMKC increased by 24%, putting a definite space crunch in the existing University Center. This new Student Union will significantly expand spaces for student organizations and government, student related services and activities, meeting spaces and the UMKC Bookstore.

## F & A - News & Updates



### Finance & Administration

#### ***"Management Services & Procurement Services - Looking Forward"***

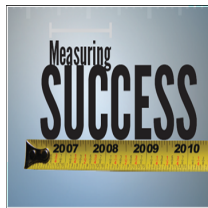
The Operational Excellence within the division of Management Services and Procurement Services will be upheld by the new leadership of Dave Sheehen as Interim Assistant Vice President for Management Services and Tony Hall as Interim Chief Procurement Officer.



### Office of the Controller

#### ***"Financial Year End Closing Schedule Available Now!"***

The FY10 Closing Schedule is now available on the Controller's web site under Hot Topics. The schedule contains deadlines for department staff relating to the year end close for fiscal year 2010.



### Institutional Research & Planning

#### ***"President's Accountability Measurement System"***

The goal of the University's Accountability Measurement System is to provide transparency and accountability regarding the University's overall performance. It's the task of Institutional Research & Planning (IRP) to gather the data for each campus as well as our Peer institution data to help each campus in their 3-year goals and annual reviews.



### Institutional Research & Planning

#### ***"Coming Soon - Information and Security Policies & Guidelines"***

Are you responsible for sensitive data for the University of Missouri? If you handle personnel or student information, you will be interested in the Information and Security Policies and Guidelines which are coming soon!



Lower Costs for Higher Ed

## Management Services

### *"Appointment to E&I Board of Directors"*

Bill Cooper, Associate Vice President Management Services and Chief Procurement Officer has been elected to the Board of Directors of the Educational & Institutional Purchasing Cooperative (E&I). Read on to learn about E&I and its benefits to the University!



## Records Management

### *"Records Management Training using TelePresence"*



More training with less expense? Yes – with TelePresence! Records Management presented their first multi-campus training session with very positive results.



## Records Management

### *"Disposition of Records"*

When you get a "Destruction Notice", don't panic! It just means that your records being stored in the Records Center have been flagged as past the retention date. Read how your records are processed when their due date arrives!



## University Procurement

### *"Reorganization - Procurement Services & Procurement Operations"*

The University has responded to the global shift in purchasing culture in recent years by reorganizing into a team-based approach considered to be "best practice".



## Sourcing & Supply Chain

### *"Embracing our Vision of Operational Excellence"*

With two major programmatic changes in the past year, this group has been the epitome of Operational Excellence. Bringing the procurement aspect of hospital purchasing within the System office for added University purchasing power in July 2009, and the deployment of the Supply Chain PLUS Project in March 2010 has resulted in enhanced patient care, lower costs, user empowerment, and significant process improvement.



## Hats Off!

### *"Exceptional Customer Service Awards"*

The Hats Off program has grown into 2 separate award systems - the Top Hat Awards and the Warm Fuzzy Awards.



## Wisdom's Corner

### *"Featuring Challenging and Inspiring Thoughts"*

The ancient Greek definition of happiness was the full use of your powers along the lines of excellence. -- John F. Kennedy

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## Welcome to InFocus!

The University of Missouri, as the state's land grant, research University, must be accountable to the public as well as state and federal governments. Our external constituencies expect that we will be good stewards of the resources entrusted to us. Finance and Administration strives to support the university's efforts toward External Accountability.

Through the development and implementation of standard policies and procedures, strong internal controls, diligent fiscal oversight, and strong institutional research capability, we are able to produce reliable financial, operational, and compliance reports on which the public can rely. These efforts help to engender confidence and trust in the University of Missouri.

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*



Vice President Krawitz

## Spotlight On ...



### Spotlight On ...

**"Records Management – Having the Right Record at the Right Place at the Right Time"**

The office of Records Management ensures the proper management, protection, and disposal of records to meet the legal, financial, administrative, research and historical needs of the University.

## Compliance Corner



## Training

### ***"Online Training – 10 Sessions Now Available!"***

Ten training sessions are now available on the Controller's Office training website that cover the basic concepts and requirements critical to financial accounting and sponsored programs compliance.



## Sponsored Programs

### ***"Effort Verification Reports"***

All employees who have expended effort on a sponsored award between January 1, 2010 and June 30, 2010 must certify an Effort Verification Report (EVR).



## Sponsored Programs

### ***"A-133 Single Audit Report"***

If you handle federally-funded sponsored projects or are responsible for administering other federal funding programs, such as Student Financial Aid or Smith-Lever, you may be contacted for documentation to support expenditures charged to federal programs during fiscal year 2010.

## Risky Business



## Initiatives to Reduce Work Related Injuries

### ***"Post Offer Pre-Employment Testing (POET)"***

A taskforce, with representatives from each campus and the healthcare system, was formed to review the rising workers' compensation experience and costs. The group recommended preventative solutions to the Administrative Management Council (AMC) which included developing a Post Offer Pre-employment Testing pilot program.

## On the Drawing Board



## Current University Projects in Design

### ***"UMKC – Katz Hall"***

Katz Hall at UMKC provides a new home for the Department of Architecture, Urban Planning and Design (AUDP).



## F & A – News & Updates



### Finance & Administration

***"NACUBO - Focused on UM Vice President Krawitz"***

UM System vice president of finance, administration receives highest honor from national business officers association



### Minority Business Development

***"Making a Difference: University of Missouri Reaching out to the Business Community"***

The St. Louis Minority Business Council, a nonprofit organization, recently held its Missouri Business Opportunity Summit at the University of Missouri in Columbia. The Council said that large and small businesses gathered at the University to help jump start economic recovery throughout the state. Further, the Business Opportunity Summit attracted more than 275 participants and 71 exhibitors from St. Louis, Kansas City and the Central Missouri area as well as buyers from corporations, government and educational institutions. The University of Missouri was involved in the planning and implementation of this high profile Summit.



### Hats Off!

***"Exceptional Customer Service Awards"***

The Hats Off program has grown into 2 separate award systems – the Top Hat Awards and the Warm Fuzzy Awards.



### Wisdom's Corner

***"Featuring Challenging and Inspiring Thoughts"***

Responsible persons are mature people who have taken charge of themselves and their conduct, who own their actions and own up to them – who answer for them. – William J. Bennett (1943 - ). *The Book of Virtues: A Treasury of Great Moral Stories*, 3 (introduction), 1993

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## Medical Residents FICA Exception

**"IRS to Honor Medical Resident FICA Refund Claims"***By Jane Closterman, Controller*

On March 2, 2010, the IRS announced that it had made an administrative determination to accept the position that medical residents are excepted from FICA taxes based on the student exception **for tax periods ending before April 1, 2005**, when new IRS regulations went into effect. Both institutions employing medical residents and individual medical residents may be eligible to receive refunds if they are covered by timely filed FICA refund claims. The IRS indicated that within 90 days it will begin notifying hospitals, universities and medical residents who filed FICA refund claims for this period with more information and procedures. The IRS has indicated that employers and individuals with pending claims do not need to take any action at this time.



The IRS News Release can be found here: <http://www.irs.gov/newsroom/article/0,,id=219731,00.html>. FAQ's provided by the IRS can be found here: <http://www.irs.gov/charities/article/0,,id=219547,00.html>. Additional information will be provided as it becomes available.

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This entry was posted on Monday, June 14th, 2010 at 1:38 pm and is filed under [2010 - 2nd Quarter](#).

### 2 Responses to "Medical Residents FICA Exception"

1.

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**Michael McGinnis** says:

August 9, 2010 at 8:15 am

Hello- I was a medical resident at UMKC from 2001-2005. Whom should I contact to verify the correct mailing information for my refund.

2.



**InFocus Editor** says:

August 11, 2010 at 1:20 pm

Brian Sanders, Director of UM Payroll advises:

Medical residents from MU should contact Tom Boren, Director for Advancement Service within the MU Office of Development & Alumni Relations. His telephone number is (573) 882-5155 and email address is [borent@missouri.edu](mailto:borent@missouri.edu).

Medical residents from UMKC should contact Chuck Henning, Director of Fiscal Operations within the School of Medicine. His telephone number is (816) 235-1814 and email address is [henningc@umkc.edu](mailto:henningc@umkc.edu).

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## Risk & Insurance Management

### "Operational Excellence in a Risky World"

By Ed Knollmeyer, Director of Risk & Insurance Management

Risk and Insurance Management (RIM) develops and manages the property and casualty insurance and self insurance programs for the University of Missouri which includes the 4 campuses, hospital, and System.



There are commonplace risks and high impact risks as part of the many University operations. RIM works to protect the physical, financial, human, and reputational assets of the University by focusing on understanding and managing risks associated with these assets, and mitigating risks through the development of consistent and compliance driven programs, policies and protocols. In addition, University risk is transferred through the purchase of insurance and the management of self-insurance programs.

While there are many [Insurance and Self-Insurance Coverages](#) in place to help protect the university's assets, they can be categorized into groups including Auto and General Liability, Professional, Property, Accident & Sickness, and others. Much of RIM's time is spent analyzing various types of insurance coverages, procuring appropriate insurance products and services, advising about risk associated with University activities, claim and loss management, and contract insurance review.

By managing the above programs on a system-wide basis, RIM is able to procure products and services, and to forecast losses more effectively than if each business unit managed its own risk program. If you have any questions about University Insurance, claims, or other Risky Business, give us a call or visit the [RIM website](#) to learn more about this department!

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## Professional Development

### "Professional Development Without Cost"

By Nilufer Joseph, Director of Financial Services



Given recent budget restrictions, last fall a "Learning, Growth, and Development" (LGD) committee was tasked with developing professional development opportunities for everyone in the division which were local and affordable. To-date, the committee has developed a [Professional Development website](#), and has coordinated opportunities to System staff which are outlined below.

The Professional Development website was developed to provide staff with information on University-sponsored training opportunities; annual conferences; and seminars, webinars, and on-line learning opportunities. The website can be found on the Finance and Administration webpage and is available for use by all staff.

In addition, through the use of in-house talent from UM Human Resources, two no cost "soft skill" sessions were organized. In December 2009, a session on "**Burning Bright without Burning Out**" helped employees gain insights into the areas of "*Employee Engagement, Work Burnout, and Career Satisfaction.*" Our instructors, Greg Holliday and Doug Buchanan, shared their ideas on research in these areas and their own views on how to take better control of work and life. In March 2010, Greg Holliday's interactive workshop on "**Resonant Leadership**" examined the characteristics of "*resonant*" leaders and how to stay "*energized and effective*" on a daily basis. Both of these sessions have been highly successful, based on the surveys we have received from the employees in attendance.

Through the review of the information provided in the surveys and through the aforementioned website, the LGD Committee will continue its efforts to provide professional development opportunities to staff as part of our continuing efforts to improve the operational excellence of our staff.

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## Training / Sponsored Programs

### "Financial Compliance Training Now Available"

By Steve Stanley, Associate Controller



The Office of the Controller is working toward compliance training as part of the University's everyday culture and viewed as a resource for additional information. The state and federal rules are complex and frequently change, so we see training as a proactive effort.

The following training sessions are currently available for sponsored programs and financial accounting.

- Allowable Costs per A-21
- Effort Verification Reporting
- Cost Transfers and Payroll Correcting Entries
- Cost Sharing
- PI Roles and Responsibilities
- Fund Accounting

The [Financial Compliance Training](#) website also has available the following on-line training modules:

- Allowable Costs per A-21 (weblinks)
- Effort Verification Reporting
- Payroll Reconciliation

The on-line modules cover the basic compliance requirements in about 15 minutes, while the live sessions are in-depth discussions and can be tailored to your unit's needs and questions.

Please contact Ericka Kranitz ([kranitze@umsystem.edu](mailto:kranitze@umsystem.edu)), Director of Financial Compliance Training at the UM System to schedule a live session with your unit.

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## Visitors in the Workplace

### "Hazardous Workplaces"

By InFocus Editor

**VISITORS  
PLEASE  
REPORT TO  
OFFICE**

There are many workplaces on the campuses where hazardous materials or equipment are located, or where hazardous operations are conducted. These include laboratories, shops, farms, animal care facilities and power plants.

It is therefore necessary to restrict access to these areas for visitors, especially children and minors. Hazardous areas include but are not limited to any university operation or space where any of the following are present:

- Chemicals or radioactive materials in use or storage
- Biological or infectious hazards
- Live animals
- Construction or renovation activities
- Utility equipment spaces, tunnels, rooftops, mechanical rooms, heavy machinery, high noise levels
- Electrical hazards
- Other areas deemed hazardous by the host department

To maintain Operational Excellence in the diverse environments of the University, stay safe and keep our visitor safe. [Risk & Insurance Management](#) has guidelines related to visitors and other safety issues on their website.

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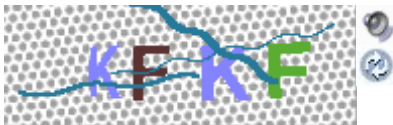
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## Current University Projects in Design

### "UMKC - New Student Union"

By Dave Sheahen, Director of Facilities Planning & Development



Construction of the \$38,300,000 New Student Union at UMKC is nearing completion. The overall UMKC student population has increased by 24% over the past 10 years and the campus has outgrown the existing University Center. This new center replaces the old University Center and will significantly expand spaces for student organizations and government, student related services and activities, meeting spaces and the UMKC Bookstore.

The New Student Union is the town center for UMKC, an iconic destination on campus for transactions, services, and community engagement. It is the government center for UMKC's community of resident and commuter students. It is a cultural center that supports street musicians and live performances. And like all successful town centers, it is a collection of memorable experiences, a place to see and be seen, full of discoveries and events large and small.

The four story New Student Union is at the southwest corner of Cherry Street and University Way/51st Street. The exterior design of the building integrates architectural details to enhance the street appearance and provide pedestrian scale. Street-level public areas have transparent high performance glazing, allowing sidewalk traffic and passing vehicles to see activity within the building. The primary building exterior materials will be brick masonry consistent with existing campus architectural character. The project hopes to achieve LEED silver for new construction.

The New Student Union is being built using the Design-Build delivery system. The Contractor is McCown Gordon Construction, Kansas City, MO, and the Architect is Gould Evans Associates, Kansas City, MO. The project is financed primarily with student fees and Sodexho, Inc made a donation. The project is being managed by Robert A. Simmons, UMKC Assistant Vice Chancellor of Facilities Services, and Larry Eisenberg, UM University Architect.



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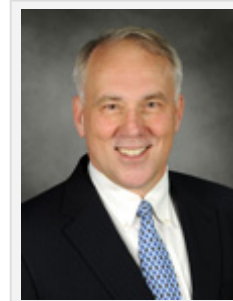
## Finance & Administration

### **"Management Services & Procurement Services - Looking Forward"**

*By Natalie "Nikki" Krawitz, Vice President for Finance & Administration*

As we thank Bill Cooper for his outstanding leadership and service over the past four and a half years, we also need to look forward.

I am pleased to announce that Dave Sheahen has agreed to serve in the capacity of Interim Assistant VP for Management Services and Tony Hall has agreed to serve as Interim Chief Procurement Officer. Dave will continue to serve as Director of Facilities Planning and Development will have responsibility for oversight of Business Services, Risk and Insurance Management, Records Management, and Minority Business Development. Tony will continue to serve as Director of Strategic Sourcing and Supply Chain for the Hospitals and will have oversight responsibility for Campus Procurement Services and Procurement Operations.



Dave Sheahen



Tony Hall

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## Office of the Controller

### "Financial Year End Closing Schedule Available Now!"

By Donna Johanning, Director of Financial Information Systems



The University Financial Year End Closing Schedule for Fiscal Year 2010 is now available on the Controller's web site <http://www.umsystem.edu/ums/departments/fa/controller/> under **Hot Topics**. This document contains valuable information regarding deadlines for Budget entries, Requisitions, Accounts Payable entries, and various other types of accounting entries that need to be submitted with a Fiscal Year 2010 date. The availability of the system during year end processing is also noted in the document.

If you have any questions about information in the closing schedule, please contact your Campus Accounting office.

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## Institutional Research & Planning

### "President's Accountability Measurement System"

By Bob Mullen, Director of Institutional Research & Planning



Institutional Research & Planning (IRP) has completed the FY09 data gathering in support of the [President's Accountability Measurement System \(AMS\)](#). This scorecard is a "... compilation of approximately 80 accountability measures that encompass all facets of our mission — teaching, research, service and economic development..." with goals and targets on five major themes to help measure our progress to those goals and compare our work to peer institutional benchmarks. These themes are:

1. Teaching and Learning
2. Research and Discovery
3. Community Service and Engagement
4. Economic Development
5. Developing and Managing Human and Physical Resources

The accountability measures and scorecard are now posted on the University's web page and are accessible to faculty, staff, students, and the public. The campuses will use this FY09 information to review their 3-year goals in comparison with historic data from FY07 and FY08 as well as data from our Peer Institutions and Benchmarks of the "best in class" for each category.

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## Institutional Research & Planning

### "Coming Soon - Information and Security Policies & Guidelines"

By Bob Mullen, Director of Institutional Research & Planning



Collaboratively, the [MU Institutional Research](#) and [UM Institutional Research and Planning](#) offices have developed guidelines and policies to protect sensitive data that University offices use in their day-to-day operations. These guidelines and policies highlight potential problems areas, ranging from unauthorized access to the work environment to the handling of sensitive or confidential data and information.

The guidelines will be published to the department's web page in the near future. Stay tuned!

This entry was posted on Saturday, June 5th, 2010 at 11:21 am and is filed under [2010 - 2nd Quarter](#).

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## Management Services

### "Appointment to E&I Board of Directors"

By William "Bill" Cooper, Associate Vice President for Management Services



Educational & Institutional Purchasing Cooperative (E&I) was established in 1934 by members of the National Association of Purchasing (NAEP) to negotiate discounted contracts based on the aggregated volume of its then 225 members. Today E&I represents nearly 2000 members, consisting of colleges, universities, health care and K-12 institutions.

On the Board of Directors, Bill will serve an initial three year term with a term limit maximum of nine years.

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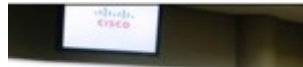
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## Records Management

### "Records Management Training using TelePresence"

By Cyndie Parks, Director of Records Management



"It's great!"

"Very convenient."

"No travel required."



"Loved the high-tech conference style."

These are some of the positive comments Records Management received after presenting our first training sessions via TelePresence. In January and February, Records Management held training sessions using TelePresence with employees from all four campuses participating. The overwhelming majority of participants liked this training format and said they would attend other training sessions presented using TelePresence. Participants stated that they liked being able to see and interact with employees across the System, not just on their campus.

One important responsibility of Records Management is to train staff on all four campuses on how to manage their department's records. In the past, we have set up all day training seminars on each campus which meant renting a room and traveling to the different campuses. Now, with TelePresence, Records Management will be able to offer more training sessions while reducing expenses.

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## Records Management

### "Disposition of Records"

By John Larkin, Records Management Analyst



Definition of Disposition: n. ones usual mood; temperament; a sweet disposition; Alt: (business / commerce) another word for disposal – *Aren't Internet dictionaries useful?*

It's not often I am accused of having a sweet disposition. My coworkers would probably be more likely to think of me by the alternate definition because so much of my time is taken up with disposal. University records are retained according to University policy and most records have a limited life-span and ultimately need to be disposed of. That is my job.

For records being stored in the Records Center, this disposition process is facilitated by our proprietary software package, Total Recall. When records are accessioned into the Records Center, Total Recall is fed the information it needs to annually produce Destruction Notices listing boxes of records deemed ready for disposal. If you or your department receives such a Notice, don't panic. Simply follow the numbered steps on the form.

The most important of these 5 steps is step 1. Be sure the Notice reaches a person who is authorized to approve destruction of these records.

A close review of the boxes listed on the Destruction Notice will alleviate most qualms about the proposed destruction. The combination of Records Analysts, University policy and Total Recall nearly always produces an accurate Notice. If you are aware of any over-riding reason to postpone destruction, please contact [John Larkin](#) at (573) 882-1449.

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## University Procurement

### "Reorganization - Procurement Services & Procurement Operations"

By Steve Mack, Director of Procurement Services



[Procurement Services](#) and [Procurement Operations](#) have undergone a re-organization. We are confident that this change will bring value to the University as a whole and to each campus as we strive to improve the services offered in this important function.

As part of this organization change, teams have been created around functional responsibilities rather than having each function replicated on every campus. In the Procurement Services chart you will notice that there are locations indicated below the names and titles. The locations indicate the campus primarily served by the position. The System location indicates that the primary function is to serve the entire university system.

We have high expectations for providing quality client service including quick and easy access to obtain answers to questions and concerns. We feel this new organization will bring great benefit to the University of Missouri and each of its four campus colleges and departments.

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## Sourcing & Supply Chain

### "Embracing our Vision of Operational Excellence"

By Tony A. Hall, Director of Sourcing & Supply Chain - MUHC



In July 2009, the MUHC Sourcing and Supply Chain division teamed up with UM Procurement under a Memo of Understanding (MOU) that developed a 'scorecard' metric designed to assess organizational performance, encourage continuous improvement, decrease costs and improve the strategic nature and collaboration of resources with UM Procurement. The first two quarters activities have exceeded the expectations of the health system and with the introduction of the Supply Chain PLUS (PeopleSoft project) applications, the MUHC Sourcing and Supply Chain team is poised to improve on their MOU obligations and measures throughout the remainder of the year.

The second innovative change was initiated in March of 2009 when a special project team was developed for the purpose of replacing the MUHC procurement system (*Procure*). Never wavering from the targeted go live and ending up significantly under budget, the PeopleSoft applications (eProcurement, Purchasing, Inventory, and a hand held application referred to as @Par) were successfully deployed on March 1st. This colossal endeavor has resulted in a fully integrated system (from requisition to payment of invoices) staged to reduce manual processes and provide access to data not previously or readily available.

These two programmatic changes made by MUHC Sourcing & Supply Chain clearly and directly embraces the F & A Mission and Vision for Operational Excellence. The real impact of these projects equates to enhanced patient care, lower costs, user empowerment and improved strategic management. This is a tremendous *PLUS* for the University and the MUHC Healthcare system as well as the community we support.

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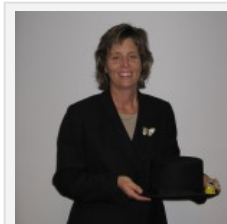
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The Hats Off program has grown into 2 separate award systems – the Top Hat Awards and the Warm Fuzzy Awards.

The Top Hat Awards are given from "The Top" – Vice President Krawitz presents these awards on a quarterly basis after receiving nominations from her direct reports. Recognizing exemplary work by F & A employees, it is given to those whose performance goes beyond the normal high expectations. The award winner receives an actual top hat to be displayed for that quarter, and a note from Vice President Krawitz recognizing them for their commendable service.



For 2nd Quarter 2010, Cuba Plain, Assistant Vice President for Planning & Budget nominated Karla Dowd, Assistant Director for Planning & Budget, and Randy Sade, Assistant Research Analyst with Institutional Research & Planning.

**Karla Dowd**

Karla Dowd receives the "Top Hat Award" for her outstanding work as project lead on the Strategic Finance implementation project. She has shown outstanding leadership and service on this project as well as spending countless hours in project discovery and design, data management (gathering, uploading, and reconciliation), input gathering, and project management. This tool will help the University achieve more integrated strategic planning and budget forecasting, and enhance what-if analysis of strategic decisions, including their impact on pro forma financial statements and balance sheet ratios. Thank you, Karla, for your hard work and outstanding service to the Finance and Administration division.

Randy Sade receives the "Top Hat Award" for his outstanding efforts in supporting the data management and reporting related to the President's Accountability Measures project. Randy has done a superb job during the last 18 months supporting the project from its inception through its first cycle of reporting to the Board of Curator's and the public in December. Randy continues to support the project including continued process improvement initiatives and the establishment of an advisory group for the project. Thank you, Randy, for your hard work and outstanding service to the Finance and Administration division.

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The Warm Fuzzy Awards are given by any staff member within F & A to those who have provided Exceptional Customer Service. Each F & A staff has access to these "Warm Fuzzies" to give out – and they have been popping up in many offices and workstations! The process is informal, allowing each staff member to choose the time and method in which to present the award.



Randy Sade

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## Wisdom's Corner

**"Featuring Challenging and Inspiring Thoughts"**

*By Memoree Bradley, Secretary to the Vice President for Finance & Administration*

The ancient Greek definition of happiness was the full use of your powers along the lines of excellence.



– John F. Kennedy

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