



# The Business Affairs Advisor

## A Newsletter by Finance & Administration

Office of the Senior Vice President for Finance and Administration

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### Looking Forward, Looking Back: Insights from Tim Burgess

*Last year at this time, The Business Affairs Advisor featured an introductory Q&A with Senior Vice President Tim Burgess, then new to the helm of Finance and Administration. Burgess now looks back on his first year and discusses challenges and opportunities on the horizon.*

*Business Advisor: What is the biggest lesson you've learned over the past year?*

*Burgess:* I came into this with some appreciation for how expansive this division was, but I don't think I fully appreciated how much of an operational function we have. Finance and Administration is a big unit with a lot of moving parts that provide the backbone of support for the University's instructional mission. There is just a constant stream of operational issues generated both internally and externally. The day-to-day operations will consume you, if you let them, and you'll find that you're thinking tactically instead of strategically. That's been the biggest adjustment for me.

*Business Advisor: Last year, you told us that you wanted to take a deliberate look at Finance and Administration's structure and goals. Where does that analysis stand?*

*Burgess:* It's just not my nature to move too quickly in terms of rearranging the deck chairs in an organization. I walked into a system that was working very well, so I took a chance to assess how best to make any changes that might help us to improve in various areas. The senior staff and I have been engaged in an evolving discussion on our strategic direction. Over the coming months, we'll settle on the best approach to put in operation the concepts that we determine.

*Business Advisor: What do you see as the major accomplishments of the past year?*

*Burgess:* I think that, due to the hard work of many people on this campus, we wound up getting a much better budget allocation than we've received in the last three years and improved our financial situation in terms of the FY08 budget. It's not yet where we want it to be, but it's heading in the right direction. The transition of the UGA Real Estate Foundation to an entity under the UGA Research Foundation is a very positive development. We had been working for more than two years to finalize that transfer, which will make the Real Estate Foundation a more integral part of the University's operations. Also, the resolution of the fraternities' move from Lumpkin Street to new homes on River Road is a major accomplishment. The accolades received by Food Services continue to reflect well upon the whole division. I also think the Finance and Administration Recognition Ceremony was a highlight; this annual event reinforces our culture of service, and the merit awards introduced this year signal all the

## Restrictions on Campus Mail Permit 165

Effective August 1, 2007, Mail Permit 165 will no longer be available for use by outside vendors and is restricted to Campus Mail.

"Outside use of the permit forces Campus Mail to assume the postage costs on behalf of our user, and problems arise when reimbursement for those mailing costs is not readily available or when charges cannot be linked directly to the appropriate department," explained Campus Mail Manager Dwayne Weaver. "Campus Mail can no longer be placed in a position where it assumes fiscal responsibility for a third party."

The bulk operation at Campus Mail has been reorganized to facilitate this change and to emphasize a commitment to customer service, reduced pricing and timely completion of projects. To establish a bulk mail job, contact Assistant Manager Matt Waldman at 542-7312. If you have any questions regarding this procedural change, please contact Campus Mail Manager Dwayne Weaver at 542-7031 or [ldweaver@uga.edu](mailto:ldweaver@uga.edu).

## Insights from Tim Burgess (continued):

right values to our staff members. Finally, it is a huge success for the University to have concluded the deal to acquire the Navy School property and to secure the initial funding to start putting together the programming for a health sciences campus.

*Business Advisor: What do you foresee as major initiatives or challenges in FY08?*

*Burgess:* The start-up of the medical campus! The effort to build, in cooperation with the Medical College of Georgia, a health sciences campus on the Navy School property will be a dominant issue for the University for several years and will especially consume Finance and Administration. There is probably not a single F&A unit that won't be affected. The continuing demand for increased enrollment places great expectations upon all of us to do the operational things that are necessary to support a growing campus.

Also the implementation of the guaranteed tuition policy will affect all of the academic and business decision-makers on campus because it will require us to be more specific in our long-range planning. The growth of satellite campuses in Griffin and Gwinnett will require us to think creatively about how we provide support services there. You'll see customer service further incorporated into the way we do business here as we work to establish a more defined and organized process of customer service improvement. We will begin a more in-depth discussion with the many stakeholders involved to determine how we can best perform our dual role of administering researchers' grants while maintaining compliance with a myriad of rules and regulations. This discussion will reinforce the need for accountability at all levels.

In addition, all University System institutions, including us, will conduct a self-audit of their environmental programs. This means we must determine our compliance with environmental regulations and voluntarily point to our deficiencies. In light of the tragedy at Virginia Tech, I charged a committee at the beginning of the summer to examine our emergency response and communications capabilities and to recommend improvements. The committee's report is due to President Adams on September 1 and will generate a lot of dialogue on campus.

We'll also find out soon whether our capital priorities were approved by the Board of Regents through its new Capital Implementation Process. We are optimistic that we will be able to begin work on the Special Collections Library next year. Needless to say, we'll be busy!

## Merger of Campus Mail and Central Duplicating



Administrative Services announces the merger of two of its enterprises: Campus Mail and Central Duplicating now are unified under one management team as Campus Mail and Duplicating Services. Both entities will remain at their current locations. The merger will allow certain projects to be completed from the initial printing phase to the last step of distributing the final product.

"A unified staff will better understand customer needs and efficiently relay capabilities offered by the new print and mail service area," said Administrative Services Director Doug Ross. "We believe that merging Campus Mail and Central Duplicating will positively impact the quality and efficiency of services offered to our customers."

For further information on how this newly organized department can serve you, contact Dwayne Weaver, who will manage both departments, at 542-7031, 542-4440 or at [ldweaver@uga.edu](mailto:ldweaver@uga.edu).

## P-Card Purchasing Tips

- Remember UGA is exempt from sales tax.
- Safeguard your P-card, keep it separate from personal card(s).
- Purchase from statewide contract vendors where applicable.
- If the items are not available on a statewide contract, search for the best price available, remembering to use small and minority vendors.
- Know your single transaction limit – do not exceed it. This is especially important when the card is not being physically swiped because the embedded limit is not a safeguard in this situation.
- Do not split orders to avoid the competitive bid threshold of \$5,000.
- Enter detailed comments in WORKS stating the items purchased, quantity, unit price and the reason for purchase.
- Change the object code in WORKS – do not leave it at 71490.
- Remember to sign off WORKS in a timely manner. All sign-offs should be completed within 12 days of the transaction post date.
- Review the manual for allowable and unallowable purchases.
- Remember that inventoried equipment cannot be purchased with your P-card. This includes computer and computer peripheral equipment, electronic audio/visual equipment and any photographic apparatus with a unit price of \$500 or more.
- Remember to contact the P-Card administrators in Procurement to ask questions and to notify them of violations, fraudulent charges or the need for P-card cancellations due to employment changes.

## Kronos – New Time and Attendance System Introduced

In April, UGA began an initiative to replace the current electronic payroll voucher system with a new time and attendance system. The University selected a product developed by Kronos, the industry leader in workforce time management systems and the University System's recommended time-tracking vendor for USG institutions.

"The new UGA system should achieve a significant savings in time collection and data entry effort for departments that have complex work schedules and challenging pay issues," said Associate Controller Bob McGee. "The system also should apply uniform pay policies and provide the University with state-of-the-art technology in time and attendance systems."

A project team has been working on the Kronos initiative since January and is now developing an interface between the new system and the University's existing payroll system, an effort that will allow the automated exchange of data. McGee notes that in many cases the new system will replace manual, labor-intensive processes and should significantly reduce errors in the process. The new system will

## Toll-Free Long Distance Calling



Directory Assistance, a division of Administrative Services, is pleased to announce the availability of a toll-free number for long distance callers (within the United States) utilizing its conference bridge. Not only does the department operate an information/locator service, but operators are also available Monday - Friday, from 8 am - 5:30 pm to set up conference calls for any day of the week at any time of the day.

For more information, contact Directory Assistance at 542-3000 or visit its [Web site](#).

## Kronos (continued):

provide enhanced data to supervisors, managers and employees on a timelier basis.

The conversion to Kronos has been divided into two phases or tracks. Track 1 consists of migrating Food Services, a department that has been successfully using a version of Kronos for two years, to an enterprise platform capable of accommodating the entire University. Track 2 consists of dividing the remainder of the University's departments into groups and implementing these groups into the system. Kronos should go live in phases over the next six months, with Food Services being the first to become operational. Additional information about the new system will be sent by the Controller's Office. You may also consult the online [FAQs](#) or contact Bob McGee at [rmcgee@uga.edu](mailto:rmcgee@uga.edu) for more information.

## New Physical Plant Financial Reporting Tool

The Physical Plant Division's (PPD) new financial reporting tool, used in conjunction with the PPD facilities management software, Facility Focus®, is now available.

A new Web site, <http://financial.ppd.uga.edu>, lets campus customers view detailed information related to PPD work orders. Currently the only information received is a one-line summary of work costs each week on the Account Status Report. The new Web site makes available the details of labor, material, contract and equipment costs. Either the work order number or the account number to which the work was charged is required to query the data.

The work order must consist of seven (7) numbers, which denote work order number and phase. This number is shown on the account status; for example, W1234501 represents work order #0812345 and phase 01. The fiscal year notation – in this case, 08 – is dropped when the order is sent to the mainframe system. If no cost is associated with a phase, the query will not return any data. The account number must be 12 digits long and requires a date range from which to search. This ensures that you only receive data for the fiscal year desired.

A link from the site to PPD's help desk email facilitates the ability to ask technical questions and receive responses from the Physical Plant's IT staff. For answers to other questions, contact Kathy Hines at [kahines@uga.edu](mailto:kahines@uga.edu) or 542-7417 or Tammy Fields at [tfields@uga.edu](mailto:tfields@uga.edu) or 542-7406.

## Checkout Streamlined at Bulldog Café



In an effort to reduce the time customers spend in line at the Bulldog Café, UGA Food Services has implemented the 'credit card no signature' program. This program, which was approved by UGA and the credit card processing company, has dramatically reduced customers' wait times in the checkout line.

Here's how the process works: on any transaction under \$25, an itemized receipt is printed without a signature line for the customer. Without the need for a signature, this process has not only shortened the wait for customers, but has also improved the customer count at the Bulldog Café.

## Enhanced HR Services

In the past year, Human Resources has implemented a number of new initiatives. Find out more at HR's new Web site:

<http://www.hr.uga.edu/>.

### Hiring Initiatives

The Executive and Faculty Search Group (EFSG) represents a groundbreaking concept for higher education. "Traditionally, higher education has relied almost exclusively on external search firms or devoted extraordinary amounts of administrator and faculty time and energy to conducting searches," said Human Resources Associate Vice President Tom Gausvik. "Now these services are in-house, and they are making a significant difference."

EFSG operates as UGA's own executive search firm, offering intimate knowledge of the institution while potentially saving hundreds of thousands of dollars compared to using outside search firms. Since October 2006, EFSG has completed nine high-level searches for the University and has seven more in progress.

Combining EFSG with the Office of Spousal and Partner Employment Assistance (OSPEA) has increased UGA's ability to identify, attract and hire top talent. OSPEA provides counseling and résumé reviewing services to partners and spouses of nationally recruited faculty and critical staff. In the past year, OSPEA has assisted 21 individuals looking for employment in the Athens area.

### Centralizing I-9s

Effective July 1, Human Resources began centralizing the collection and maintenance of Form I-9s for all new hires. This centralization coincided with state-mandated participation in the federal Electronic Employment Verification System. HR initiates the employment verification check in the federal system, which takes a matter of seconds, upon receipt of the completed Form I-9s.

### iPAWS

HR has implemented a new Integrated Position, Applicant and Workforce System (iPAWS) and reports that hiring units are discovering the process provides a substantially easier and faster way to post positions and review applications.

### Coming Up

In the next few months, HR will implement a number of innovative programs designed to enhance customer service for faculty, staff, and retirees:

## Fiscal Management Courses: Summer and Fall 2007

Visit the Training and Development course description [Web site](#). to find out more details and to register for courses.

*Accounting with Web DFS*  
Instructors: Sharon Thelen and Carolyn Dial, UGA Departmental Financial Systems Department (3 sessions, attend only one) July 26, August 23 and September 26  
All dates: 9 am - 12 pm

*IMS and QMF for the UGA Budget System*  
Instructors: UGA Budget Training Team  
July 31  
9 am - 12 pm

*Basic Elements of Sponsored Projects Administration at UGA*  
Instructors: MaryAnn Deom, Office for Sponsored Programs, and Tracy Walters, Contracts and Grants  
September 19  
9:30 am - 12 pm

*Writing Iron-Clad Justifications for Cost Accounting Standards Board (CASB) Rule Exceptions*  
Instructor: Dr. Regina Smith, Office of the Vice President for Research  
September 20  
10 am - 12 pm

## Enhanced HR Services (continued):

- **UGA Financial Planning and Education Center (FPEC)** - The first of its kind in higher education, the FPEC will open in August 2007. FPEC will offer personal counseling services for financial, retirement and wealth management planning, as well as many educational services. Representatives from the Board of Regents' Optional Retirement Plan vendors, including TIAA-CREF, AIG-VALIC and Fidelity Investments, will provide on-site counseling and educational services on the second floor of the HR building. Appointments may be made during regular HR business hours. A plan for expanded educational offerings already is being developed.
- **Flexible Spending Account Enhancements** – Beginning January 1, 2008, participants in the Med-Flex and Dependent Care programs will have use of a spending card, may initiate reimbursement requests online, may check their account balances online 24/7, and will have the ability to spend their deferred dollars through March 15 of the following calendar year.
- **Benefits Enrollment** – New hires will be able to complete their benefits enrollment online by the middle of calendar year 2008. HR also is aiming to make the 2008 benefits open enrollment period a completely online, paperless process.

## Auto Coverage and Safety Training Video



One of the most important tools of risk management is knowledge. For that reason, all UGA employees should familiarize themselves with procedures for reporting state vehicle accidents. The State of Georgia Department of Administrative Services (DOAS) Risk Management Office has recently developed an Auto Coverage and Safety

Training video that outlines such procedures and explains when employees are, and more importantly, when they are not insured.

To view the 15-minute video, follow four easy steps:

- 1) Go to [www.doas.georgia.gov](http://www.doas.georgia.gov)
- 2) Click on Risk Management Services
- 3) Click on Auto Liability Safety Video
- 4) Complete the online acknowledgment form verifying you have seen the video when you are done.

"Agency participation in this training exercise is being reviewed by the Governor's Office, and it is imperative that all employees watch the video," said Administrative Services Assistant Director Kathy McCarty, who oversees the University's risk management program. If you have further questions regarding coverage, accidents, or if you would like to request additional yellow insurance cards, contact the UGA Risk Management Office at 425-3250 or visit its [Web site](#).

## Reminder: Call for MRR Requests Forthcoming

Vice presidents and deans will receive the annual call for Major Repair and Renovation (MRR) submissions in mid-August, with a deadline of mid-October for requests to be submitted. Projects eligible to be considered for MRR funding generally range between \$40,000 and \$1 million. As is customary, a justification of the need for the project should accompany the description.

Requests for individual school/department needs will be considered by the MRR Committee in the context of a broad examination of overall institutional needs. A total University funding package will then be recommended to President Adams and the three senior vice presidents for consideration and approval.

Please contact Sean Rogers at 542-3605 or Kathy Pharr at 542-1361 if you have any questions regarding the MRR process.

## UGA Finance and Administration Restructures Management in Several Divisions

The University of Georgia's Office of Finance and Administration, which includes nearly 1,600 employees in seven divisions, restructured its management functions in several of those divisions effective July 1, 2007. Three of the four actions being taken to fill key vacancies are promotions for current Finance and Administration staff while the fourth welcomes a new face to the University campus.

"These four positions are positive developments for our management team," said Tim Burgess, senior vice president for finance and administration. "They make good use of existing resources and personnel, offer opportunities for promotion from within, and greatly enhance our capabilities to serve the campus. All of the individuals selected are highly qualified to assume these new roles, and I look forward to maximizing the strengths they will bring and the contributions they will make to the University."



The first two actions occur in the Budget Division. Ken McCollum, who for the last 4½ years has served as assistant budget director, will be promoted to senior director of the Budget Division. In his new position, McCollum's responsibilities will be expanded to include all issues pertaining to UGA's annual operating budget, as well as the day-to-day management of the budget office, departmental financial systems, and the information technology support that the Budget Division provides to campus. He has worked for the University for 12 years and previously led the budget review office in the Office of the Senior Vice President for

Academic Affairs and Provost.



As a complement to McCollum's promotion, Sean Rogers, who has served as the assistant director for finance and capital planning in the Office of the University Architects for Facilities Planning for the past four years, will be promoted to director of capital budgeting in the Budget Division. In this role, Rogers will coordinate with the Physical Plant, the University Architects Office, Environmental Safety, the UGA Real Estate Foundation, the Office of the Vice President for Research and other UGA units in regard to the allocation and management of all funds and resources that are directed toward capital needs. This move will enable

UGA to assume a more "global approach to capital planning and budgeting," Burgess said, "with well coordinated capital efforts and ultimate flexibility in project management."

## Changes at the Pump for State Vehicles

UGA employees who operate state vehicles need to be aware of changes when they fill up at the pumps. The changes are required to meet new reporting requirements imposed by the State Fleet Management Office and Office of Planning and Budget.

Vehicles on campus are assigned a WEX card, which is vehicle-specific to facilitate tracking of fuel usage and maintenance. It must only be used for the vehicle to which it is assigned (no exceptions).

The most significant change for users is the required use of a PIN. Each employee's PIN consists of the first six digits immediately following "810" on the UGACard. The unique PIN will serve as an electronic signature to identify purchasers. It may be used with any vehicle WEX card. All employees will have a PIN number, and the WEX database will be updated regularly to add new hires and delete those who have terminated employment.

New this year is a special RED WEX card for departments that need to purchase fuel for off-road equipment – farm tractors, utility carts, boats, lawn mowers, etc. – not passenger vehicles (no exceptions).

Departments in need of a RED WEX fuel card can find the request form on the UGA Procurement

[Web site](#).

## Finance and Administration Restructuring (continued):

Both McCollum and Rogers will report directly to Senior Associate Vice President Ryan Nesbit. "These moves will enable Ryan, who took on the additional responsibility of overseeing the budget since I vacated that position at this time last year, to return his focus to strategic budget issues of paramount importance to the University, as well as to devote more of his time to overseeing the day-to-day operation and management of all of our divisions," said Burgess.



The third change comes in the Controller's Division. Chad Cleveland, who has served as the director of accounting services since 2000, will be promoted to associate controller. In this role, Cleveland will be responsible for the University's financial accounting and reporting functions, including oversight of three departments: accounting, property control, and contracts and grants. He has held several other positions with the University over the past 14 years, including database programmer with the international development office and various accounting positions within the Controller's Division. Cleveland will report

directly to Controller Holley Schramski, as will Associate Controller Bob McGee and Bursar Lisa McCleary, who oversee the expenditure and revenue functions, respectively, that fall within the purview of the Controller's Division.



The fourth position, assistant vice president for Physical Plant, replaces the former executive director position held by Chip Semerjian, who retired from the University in December 2006 after 35 years with the institution. Tom Satterly will report directly to Associate Vice President Ralph Johnson and will be responsible for developing, managing and functionally coordinating all issues in regard to the management and operations of the University's facilities, grounds and campus infrastructure. Satterly recently retired after a 20-year career in the U.S. Navy. His numerous tours of duty at naval facilities around the world included Guam and the

Naval Postgraduate School in Monterey, California. He was most recently stationed at the Naval Facilities Engineering Command Northwest in Silverdale, Washington.

## Review of UGA's Emergency Preparedness Underway

Two committees have been meeting over the course of the summer to study and recommend ways the University can prevent or – if necessary – deal with emergencies or situations that may threaten the safety of students, faculty and staff. Their reports are due to President Michael F. Adams on September 1.

Adams established the committees in response to the April 16 shootings at Virginia Tech University and charged them with examining UGA's "plans, protocols, procedures and infrastructure" as they relate to emergency preparedness and to psychological services on campus.

Adams assigned Senior Vice President Tim Burgess to assemble the committee on Emergency Preparedness, and Provost Arnett Mace to form the committee on Psychological Services.

Both committees include representatives of faculty, staff, students, administrators and parents. The University System of Georgia has been working since last fall to develop a plan for handling emergencies that will apply to all schools in the System, and UGA's plan will be part of the System-wide effort.

## Building the Student Learning Environment



You don't have to look far to see the signs of progress on campus this summer. Construction continues at a brisk pace on several facilities, with several more projects slated to begin this fall.

Relocation of utilities and foundation work has begun on the parking deck that will be underneath the Tate Student Center expansion. The parking

deck represents the first phase of the Tate II project, with construction of the building itself beginning in the fall. The parking deck should be completed late next summer, and the Tate II facility should be ready by the spring of 2009.



Construction of the Lamar Dodd School of Art on East Campus has passed the midpoint. The first classes will be offered there in the fall of 2008. Late next month, the new \$30-million Coliseum Training Facility will be dedicated.

Other pending major projects include the Pharmacy addition, which will begin

construction this fall; the Griffin Campus' Student Learning Center, also scheduled to be underway this fall; the first phase of renovation to the Fine Arts Theater, set to commence late next spring; and the construction of new livestock facilities for the Double Bridges Farm, which will begin in winter of 2009.

## In the Next Edition...

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Latest Travel Information

Proper Disposal of Electronic Equipment

## Contact Information

For more information, please select the division below, and you will be re-directed to their Web site.

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[Budget Division](#)

[Controller's Division](#)

[Environmental Safety](#)

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## UGA Launches Five Customer Service Initiatives for FY 2008

As the flagship institution of higher education in the State of Georgia, the University of Georgia prides itself on leading the pack. Take customer service, for example. When the University System Office asked for a special customer service project to be pursued in Fiscal Year 2008, UGA submitted five initiatives.

"Providing the best customer service possible to our students, faculty and staff is clearly one of our primary responsibilities," said Senior Vice President for Finance and Administration Tim Burgess, who serves as UGA's "champion" in the statewide customer service effort. "If we consistently remind ourselves who our customers are, I believe we will serve the University and its mission well."

The new initiatives include the following: 24-hour food service for meal plan participants; an enrollment checklist to ensure that all requirements for enrollment have been fulfilled; a single 1-800 number for callers anywhere in the state to reach their local county extension offices; concentrated customer service training for frontline staff; and the development of an institution-wide process improvement model. The latter program involves the creation of a high-level steering committee and process improvement project teams, which will review and make recommendations for continual process improvement. A process improvement manager will oversee the program and apply appropriate process improvement methodologies, including Lean Six Sigma, to maximize impact and measure results.

All of the initiatives are in keeping with Governor Sonny Perdue's pledge to make access to state agencies faster, friendlier and easier. Last fall the University submitted as its first customer service project the booknow<sup>®</sup> program, which enables students to purchase their textbooks online at the time of their online registration for classes. This collaborative initiative between the UGA Bookstore and the UGA Registrar's Office was warmly received, with annual online textbook sales increasing by nearly 39 percent (averaged over fall, spring and summer semesters).