

AGENDA

**SLU Business Manager Meeting
August 10, 2006
AB Auditorium, John Cook School of Business
9:00a.m.-11:00a.m.**

- 1) Meeting Overview/Announcements: Linda Bantle**
- 2) Effort Reporting: Doug Leavell**
- 3) Picking up Checks: Brian Pini**
- 4) Purchasing Update: Tawnya Musial**
- 5) Budget Update: Gary Whitworth**
- 6) Accounts Payable and Travel Program Update: Sharon Gajewski**
- 7) Travel Initiative Report - Results through 6/30/06: Linda Bantle**
- 8) Business Manager Survey Results and Open Discussion: Linda Bantle**

Business Manager Meeting

Minutes of the Meeting of August 10, 2006

Meeting minutes of the Saint Louis University Business Managers held at 10:00 a.m. on Thursday, August 10 2006 in the AB Auditorium in the John Cook School of Business.

Business & Finance Staff Present:

Bryan Pini	Tom Meadows	Lori Myers	Gary Whitworth
Lisa Zoia	Linda Bantle	Doug Leavell	Rob Devereaux
Lee Kneibert	Sharon Gajewski	Mary Drexl	Bruce Andres
Janice Crawford	Vicki Cassady	Marsha McBride	Stacey Barfield
Tawnya Musial			

Number of Business Managers Present: 65

Linda Bantle welcomed everyone to the meeting and had new Business Managers in attendance introduce themselves to the group. Members of the Business & Finance Division introduced themselves also.

Effort Reporting

Doug Leavell announced that the University has received a letter stating that we will be audited on effort reporting. Do not destroy any documents. We will need to produce effort reporting documents, payment records and supporting documents. This pertains to Health and Human Services, NIH Grants.

Check Pickups

Bryan Pini announced that check pick-up has now moved to the Cashier's office in DuBourg Hall (ground floor). Tonya Gallina will notify an individual or a department when a check is ready for pick up. The person picking up the check needs to know the name on the check they are picking up (Tonya will provide that information when she notifies the department a check is ready for pick-up.) Those at Salus and HSC can request check pick up at Salus but need to pick it up the same day, before 2:00 p.m. to avoid checks being held in the Treasurer's office. Those not picked up by 2:00 p.m. will be sent to the Cashier's office for security purposes.

Brian also requested that the Business Managers track where credit card numbers are stored in their department (in a locked or unlocked file cabinet, or on a hard drive). This issue will be discussed at a future meeting.

Purchasing Update

Tawnya Musial reported that Purchasing was awarding a contract later in the day for electronic recycling. She will be sending an email to those departments participating requesting location of equipment in order to coordinate how the pickups will be scheduled.

Issues with the Tenet firewall still continue for any department located in a Tenet owned building. The temporary solution is to contact one of the following Curtis 1000 representatives so your orders can be picked up or faxed and processed by Curtis 1000.

Tom McCleery
314-761-8216
tmccleery@curtis1000.com

Updated 12/18/08

or

Melanie Henley
314-845-1589
mhenley@curtis1000.com

Budget Update

Stacey Barfield thanked everyone for their assistance in the FY07 budget roll. Finance budgets are available in Self-Service and Internet Native Banner and will be reflected on the July month-end reports. An After Action Review of the budget roll meeting with Human Resource and Payroll is scheduled for next week with the intent of developing integrated business manager focus groups and training for the FY08 budget roll. Stacey reminded everyone to continue to monitor their employees' job records on NBAJOBS and position budgets on NBAPBUD as well as utilize the applicable reports available on the Business Intelligence Dashboard. Any process improvement feedback from the business managers would be welcome and appreciated.

Accounts Payable and Travel

Sharon Gajewski gave several procedure reminders (see Accounts Payable and Travel handout posted on the web under 8/9/06) regarding getting new PO numbers to vendors, reminding vendors of the AP billing address and other items. Sharon also stated she will be reviewing the current list of reports available to Business Managers and see what others could be developed. Those who have signed up for policy and process discussions will be contacted by Sharon for follow-up meetings. Sharon also will follow up on any feedback from the survey that mentions other areas of concerns or suggestions for improvements.

Travel Initiative Report

Linda Bantle reviewed the presentation give to the CADD (Council of Academic Deans & Directors) on Wednesday, August 9, 2006. ([CADD PRESENTATION](#)) There have been savings in all areas, especially in the meal expenses area. It was determined the electronic expense reporting system that was offered as a no cost option from American Express, does not meet the University's needs. The University will be submitting a Request For Proposal for a new on-line expense reporting program. Feedback from current electronic expense reporting system users would be appreciated as the process begins. 85% of hotel bookings are for conferences and that limits the University's purchasing power in trying to secure better hotel rates. The two cities visited most by University travelers (Washington D.C. and Chicago) will be contacted about trying to get reduced rates on hotels.

Business Manager's Survey

There was a 72% participation rate in responses to the survey. The [survey results](#) are posted on the web under the Business Manager's section of the Business & Finance web site. Responses included a suggestion to include a "What's New" section on the web to recap the latest changes in University business practices. Other suggestions included shortening the meetings to 90 minutes, and those with questions can stay afterwards to have questions answered. Another suggestion was to set up one page on the website where all travel related links and the appropriate contact person for that area are listed

The meeting ended at 10:25 a.m.

Minutes respectfully submitted by Mary Drexel.

ACCOUNTS PAYABLE AND TRAVEL

By Sharon Gajewski, Manager Accounts Payable and Travel
August 9, 2006
To: Business Managers

Purchase Orders

Please communicate your new purchase order numbers to your vendors and remind them to show these numbers on their invoices. Accounts Payable is receiving many invoices with no purchase orders, names only, or old numbers. This is causing delays in processing the invoices and payments and may also cause late fees or loss of discounts.

Invoices

Vendors should mail all invoices directly to Accounts Payable at 3545 Lafayette, 6th floor. Slips with drop offs from "Clean" uniforms, Mid-America Coffee, Coca-Cola, etc. are the invoices and should be sent to AP. Please send them often. Don't stack them up for a month.

Stop Payments and Voiding Checks

Kris Karwoski-Siebert, kkarwosk@slu.edu, is the **AP** contact person to place stop payments or to have checks voided and/or reissued. **Travel** stop/void requests should go to Angela Jouglard, jouglam@slu.edu. It is best to communicate your request in an email.

Etervs

Beginning fiscal year '07, the Etervs will be scanned and indexed. They can be viewed using WebXtender. Use the Trip ID number beginning with A0 for your search. A new Eterv form with lines at the bottom has been developed for documenting emails, phone calls, and adjustments made in order to process the expense report. Please note the name and dates of who was contacted and why. If everyone uses this area, the information will be readily visible for review after the Eterv is processed and scanned.

AXO and Booking Travel

Sharon Cratty at Amex has begun using the Request for Travel Authorization form to obtain and communicate information for the travels booked with her. This form is used to provide all the information concerning a trip when obtaining approval.

Currency Exchange

Currency exchange information can be obtained at the following web site.

www.oanda.com/converter/classic?user=frcrrn

This link will be added to the Travel Policy.

Saint Louis University
Request for Travel Authorization

Trip Information:

Traveler's Name	Fund Number
<input type="text"/>	<input type="text"/>
Dates of Travel	Policy Violation
<input type="text"/>	<input type="text"/>
Trip Number	Selected Airfare Amount
<input type="text"/>	<input type="text"/>
Trip Name	Agency Fee
<input type="text"/>	<input type="text"/>
Trip Purpose	Lowest Airfare Amount
<input type="text"/>	<input type="text"/>
Trip Description	Booker Comments
<input type="text"/>	<input type="text"/>

Estimated Trip Costs:

Airfare & Agency Fee
\$0.00
Lodging
<input type="text"/>
Car Rental
<input type="text"/>
Additional Expenses
<input type="text"/>
Total Trip Cost
\$0.00

Notes:

<input type="text"/>

SAINT LOUIS UNIVERSITY

Electronic Travel Expense Reimbursement Voucher (E-TERV)

See policy and instructions at http://www.slu.edu/newslinks/travel_resources.html

Name of Traveler		Banner Id Number	Status	Trip Number	
Department Name and Org. Code	Building/Room	Campus	Contact Person	Phone	
Purpose of Trip	Destination(s)	Departure Date	Return Date	Meal Per Diem Rate	SLU Lodging Per Diem

*** Important Notice:** The receipt and documentation requirements for each travel expense type (ex. commercial fares, lodging) can be found by holding your cursor over the applicable cell. Effective 9/10/07 while traveling all Business Meals and Entertainment must have Meal and/or Entertainment form completed and attached to Eterv. See form below on additional tab.

Expense Report

Dates (mm/dd/yy)	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Total Expenses	Prepaid / Deductions	Net
Airfare								-		
Travel Agency Fees								-	-	
Ground Transportation & related tips								-		-
Mileage X \$0.485		Describe/Justify:						-		-
Auto Rental/Transportation Calc.		Describe/Justify:						-		-
Parking/Tolls/Gas								-		-
Lodging								-		-
Requesting Reimbursement for Conference Rate	<input type="checkbox"/> if checked, attach conference page noting rate									
Registration Fees								-		-
Business Communications								-		-
Business Purchase		Describe/Justify:						-		-
Meals & related tips								-		-
Business Meal/Entertainment								-		-
Non-Meal Tips/Incidentals								-		-
Total from extra ETERV pages (trip 8+ days)								-		-
Totals								-		-

Maximum Reimbursement Allowed by Department	Enter the maximum reimbursement amount for this trip as allowed by the department and communicated to the traveler. If full amount of trip is reimbursable, enter the total expense amount.			
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Additional Notes/Justifications (attach additional pages if necessary):

FUND INFORMATION

Fund Title	Fund/Acct/OrgCodes	Amount	SLU Cash Advance	
			Net Amount Due Traveler	
			Net Amount Due Saint Louis University	
This amount must agree with the maximum reimbursement allowed by department		Total →	\$	I certify that this expense report is a true and accurate accounting of expenses incurred on authorized University Business Travel consistent with University policies and procedures.
			-	
Supervisor/Department Head	Date	Traveler		Date
Financial Administrator	Date	Dean, VP or Additional Signatures as Required		Date
For Financial Administrative Use				
Missing Receipts or Documentation:				
Explanation or Justification:				
Out of Policy Adjustments				

FY06 Business Manager Survey Summary

Responses 113
 Response Rate 72%

1. How often do you visit the website?

Every Day	Once a Week	Once a Month	Once Only
18.6%	42.5%	36.3%	2.7%

2. Is the website easy to navigate?

Very Easy	Easy	Neutral	Difficult
10.6%	51.3%	35.4%	2.7%

3. How useful is the information you find?

Very Useful	Useful	Neutral	Somewhat Useful
18.6%	42.5%	36.3%	2.7%

4. Have you attended Banner brown bag sessions?

Yes	No
58.4%	41.6%

5. How useful is the information at the brown bag sessions?

Very Useful	Useful	Neutral	Somewhat Useful
34.4%	48.4%	14.1%	3.1%

6. I attended brown bag sessions at . . .

North Side of Campus	South Side of Campus	Both Sides of Campus
17.2%	60.9%	21.9%

7. My title is . . .

Business Manager or Manager	Financial Coordinator or Coordinator	Assistant Director or Director	Admin. Assistant (including SR)	Admin. Secretary	Other
32.7%	15.5%	20.9%	10.9%	8.2%	11.8%

8. During FY06, I attended . . .

Less Than 4 Meetings	4-7 Meetings	More Than 7 Meetings
25.5%	40%	34.5%

9. The format of the meetings . . .

Is Fine, no change needed	Could Be Improved
63.6%	36.4%

FY06 Business Manager Survey Summary

10. How do you suggest the format of the meetings can be improved?

More Group Interaction	More Opportunity For Networking	Reduce The Meeting Time	Limit Attendance To Business Managers	Other Suggestions
37.5%	32.5%	45%	25%	42.5%

11. Has communication improved since the business manager meetings have been implemented?

Yes	Somewhat	No
69.4%	27.8%	2.8%

12. The following topics/updates have assisted me in doing my job better . . .

	Very Helpful	Helpful	Neutral	Somewhat Helpful	Not Helpful	Response Average	N/A To My Job
Travel	45%	43%	7%	4%	2%	1.76	5
Purchasing	34%	42%	12%	8%	5%	2.08	2
Payroll	31%	46%	16%	5%	1%	1.98	8
Accounts Payable	20%	42%	27%	9%	2%	2.32	2
Financial Planning & Budget	24%	34%	32%	5%	5%	2.33	9
Sponsored Programs	15%	33%	32%	9%	11%	2.68	28





13. What topics/speakers would you recommend for future meetings?





Banner & Upcoming Enhancements	77.6%
Financial Services/HSC Finance Office Document Review	65.4%
Information Technology	57.0%
Adhoc Financial Reporting	50.5%
Hiring & Termination Process	47.7%
E-PAF	47.7%
Compensation	39.3%
Professional & Organizational Development	37.4%
Other	11.2%

14. How satisfied are you with the Business Manager meetings?





Very Satisfied	Satisfied	Neutral	Somewhat Satisfied	Not Satisfied
21.5%	59.8%	11.2%	5.6%	1.9%

FY2006 Business Manager Survey Results

1. How often do you visit the website?			
		Response Percent	Response Total
Every day		18.6%	21
Once a week		42.5%	48
Once a month		36.3%	41
Only once		2.7%	3
Never		0%	0
Total Respondents			113
(skipped this question)			0

2. Is the website easy to navigate?			
		Response Percent	Response Total
Very Easy		10.6%	12
Easy		51.3%	58
Neutral		35.4%	40
Difficult		2.7%	3
Very Difficult		0%	0
Total Respondents			113
(skipped this question)			0



FY2006 Business Manager Survey Results





3. How useful is the information you find?			Response Percent	Response Total
Very Useful		28.3%	32	
Useful		55.8%	63	
Neutral		8%	9	
Somewhat Useful		8%	9	
Not Useful		0%	0	
Total Respondents			113	
(skipped this question)			0	

4. Please provide comments about changes or additional features you would like to see on the website.	
<u>1.</u>	Make forms more accessible and easier to find. N=8
<u>2.</u>	Post a complete listing of the Banner chart of account codes.
<u>3.</u>	Post a correct and complete list of vendors with contact information. N=7
<u>4.</u>	Post HSC Finance policies and procedures on Business & Finance website. N=2
<u>5.</u>	Keep information up to date. N=5
<u>6.</u>	Make sure all links work properly.
<u>7.</u>	Include more Sponsored Program information. N=3
<u>8.</u>	Provide a direct link to Business & Finance website from SLU homepage.
<u>9.</u>	Add a "What's New" section.
<u>10.</u>	Add more links to policies and procedures for Purchasing and Financial Services.
<u>11.</u>	Post more checklists.
<u>12.</u>	Make website more user friendly. N=2




FY2006 Business Manager Survey Results

<u>13.</u>	Include the ability to search by a word or phrase.
<u>14.</u>	Add links to HR processes.
<u>15.</u>	Information is generic, directions are vague.
<u>16.</u>	Add "How To" instructions for new Business Managers.
<u>17.</u>	Website is not fluid, seems to have contradictions.
<u>18.</u>	List steps on how to submit requisitions on-line along with other programs focusing on the budget.
<u>19.</u>	Request a list of all forms used by Business Managers to be sure they are all posted.

5. Have you attended Banner brown bag sessions?			
		Response Percent	Response Total
Yes		58.4%	66
No		41.6%	47
Total Respondents			113

6. How useful is the information at the brown bag sessions?			
		Response Percent	Response Total
Very Useful		34.4%	22
Useful		48.4%	31
Neutral		14.1%	9
Somewhat Useful		3.1%	2
Not Useful		0%	0
Total Respondents			64
(skipped this question)			49

FY2006 Business Manager Survey Results







7. I attended brown bag sessions at:			
		Response Percent	Response Total
North side of campus		17.2%	11
HSC side of campus		60.9%	39
Both sides of campus		21.9%	14
Total Respondents			64
(skipped this question)			49

8. Please provide comments about changes or additional topics you would like to see at the Banner brown bag sessions.	
<u>1.</u>	Meeting time is not convenient. N=3
<u>2.</u>	Continue discussion of travel issues.
<u>3.</u>	Would like to see more of a presence from HSC Finance at the HSC Banner meetings to discuss specific policies and procedures such as 1)possible reasons for delays in processing DPVs and expense reports; 2)things to be aware of when submitting TCs and Labor Redistributions and give examples of ones that are done perfectly; 3)requests for Accounts and budget requests that are done correctly to avoid delays; 4)the process for submitting requests for Social Functions and examples of different scenarios.
<u>4.</u>	Post updates on the website for those who cannot attend meetings.
<u>5.</u>	Offer the sessions in order, maybe requiring a prerequisite.
<u>6.</u>	The coordinators deserve some form of recognition for their efforts as this has been very helpful.
<u>7.</u>	Offer the chance for departments to give input on vendors and how they are chosen. And for purchasing to receive feedback on vendors that have been given full rights to University business as follow up for the next Fiscal Year.
<u>8.</u>	The sessions where specific topics are covered are interesting and helpful.
<u>9.</u>	North side brown bag sessions are much more of a collaborative effort and exchange of useful information. HSC brown bags seem to be an open format to brow-beat or bash our invited. They could be a lot more productive had the attendees approached the subjects/meetings in such a way.
<u>10.</u>	Would like to see an EPAF presentation.
<u>11.</u>	I attended the banner workshops and found the information had to be crammed into one day (4 hours). It would be a good idea to designate a person in Purchasing that could answer questions.
<u>12.</u>	Once a week seems to be too often, every other would be good.
<u>13.</u>	The brown bag sessions are able to help me with problems by showing me how other Managers are handling them. The Brown bag is a great place to learn new techniques and to socialize with others doing the same job.

FY2006 Business Manager Survey Results

- 14.** The process to date has been great and covers the audience knowledge base in that you cover details from start to finish. Some individuals complain that sometimes it feels "elementary" however it needs to be that way so that you cover the skill sets for so many different individuals. I love the fact that the facilitator never acts frustrated by any of the questions. It is very clear that the intent is to keep everyone on the same page and is understood the learning curve is different for everyone. I am extremely impressed and grateful for the business managers meetings and brown bag training sessions and that the facilitator is so well versed and very patient and respectful to everyone.
- 15.** If we could provide topics to the trainer of what we need to hear more about prior to the meeting so that we aren't going over topics we already know.
- 16.** The brown bag was helpful to some degree but very generalized.

9. My title is . . .




		Response Percent	Response Total
Business Manager or Manager		32.7%	36
Financial Coordinator or Coordinator		15.5%	17
Administrative Assistant (including Sr.)		20.9%	23
Assistant Director or Director		10.9%	12
Administrative Secretary		8.2%	9
<input type="button" value="View"/> Other (please specify)		11.8%	13
Total Respondents			110
(skipped this question)			3



9A. My title is . . .

1.	Senior Accounting Assistant
2.	Financial Analyst N=2
3.	Finance Office
4.	Office Manager N=3
5.	Analyst
6.	Financial Assistant, Sr

FY2006 Business Manager Survey Results






<u>7.</u>	Department Administrator, Sr. N=2
<u>8.</u>	Grants Development

10. During FY06, I attended . . .			
		Response Percent	Response Total
less than 4 meetings		25.5%	28
4 - 7 meetings		40%	44
more than 7 meetings		34.5%	38
Total Respondents			110
(skipped this question)			3

11. The format of the meetings . . .			
		Response Percent	Response Total
is fine, no change needed		63.6%	70
could be improved		36.4%	40
Total Respondents			110
(skipped this question)			3

FY2006 Business Manager Survey Results

12. How do you suggest the format of the meetings can be improved? Check all that apply and/or include additional suggestions.

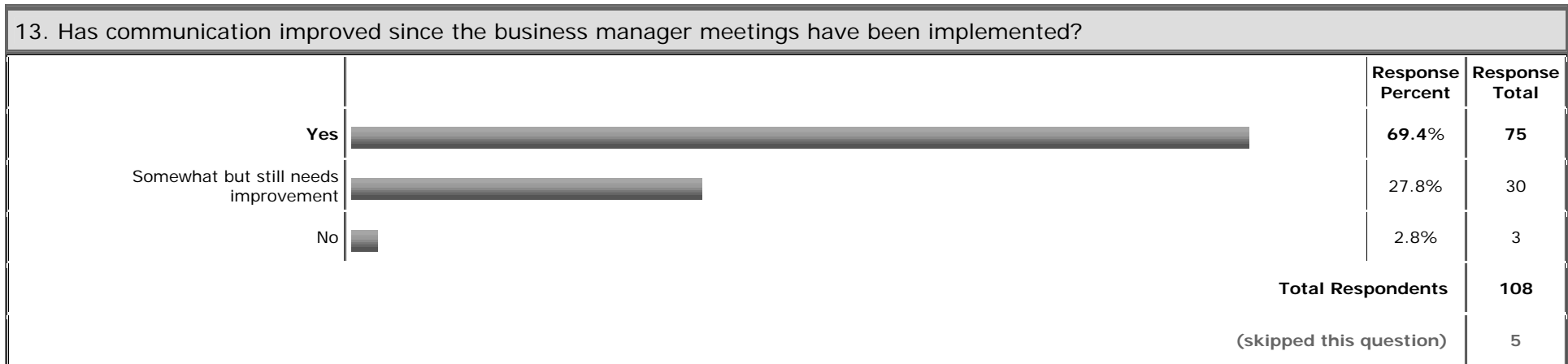
		Response Percent	Response Total
Include more group interaction		37.5%	15
Provide more opportunity for networking among the business managers		32.5%	13
Reduce the meeting time		45%	18
Limit attendance to business managers only		25%	10
View Other suggestions		42.5%	17
Total Respondents			40
(skipped this question)			73

12A. How do you suggest the format of the meetings can be improved?

<u>1.</u>	The meeting is more a dictation on what everyone should do per Business and Finance.
<u>2.</u>	Better manage Q&A during the meetings. N=5
<u>3.</u>	Perhaps always include a 'new' agenda item instead of just getting updates on on-going items and reviewing things we've discussed previously.
<u>4.</u>	We need a Business Manager 101 session for basic duties and processes.
<u>5.</u>	More group discussion of business process improvements.
<u>6.</u>	As many introductions are not necessary. The newly hired would be most appropriate.
<u>7.</u>	Hold additional panel discussions such as the travel panel. Set aside some meetings to discuss the automation of several business & finance processes (e.g. labor reallocations, transaction corrections, DPV's). Reduce the frequency of presentations where attendees are just talked to by B&F personnel, as some of this information (e.g. purchasing cost savings) could be shared via the web site.
<u>8.</u>	Stick to the agenda; if a presenter runs over allotted time, let them know their time is up.
<u>9.</u>	Reduce the meeting time to one hour. N=2
<u>10.</u>	Focus on one or two specific topics. This would allow for a more detailed discussion of a single topic. A lot of the updates could be posted on the website without the need to be discussed at the meeting.

FY2006 Business Manager Survey Results

<u>11.</u>	Would like to see more information from Sponsored Programs on how we can expedite items from/to their office.
<u>12.</u>	If there is nothing new maybe that topic should only open to questions instead of rehashing the same information month after month.
<u>13.</u>	Have all speakers wear a microphone.
<u>14.</u>	Limit travel talk.
<u>15.</u>	Eliminate training from the meetings.



14. Please provide suggestions that would help further improve communication.	
<u>1.</u>	Include Business Managers input on policies before they are created. N=3
<u>2.</u>	Include anyone that has to deal with the day to day functions instead of only Business Managers.
<u>3.</u>	Including someone from HSC Finance on the agenda would be helpful if there are specific agenda items that need to be addressed.
<u>4.</u>	Separate issues that only pertain to Frost versus HSC.
<u>5.</u>	More frequent notices on Newslink. More emails for people who don't read Newslink. More choices of sessions when policies/procedures change.
<u>6.</u>	Implement smaller working groups/subcommittees to present at Business Manager meetings. N=3
<u>7.</u>	Continue to increase email notifications to business managers.
<u>8.</u>	The website and e-mails are very informative.
<u>9.</u>	A faster method for facilitating innovation, such as lean strategies.

FY2006 Business Manager Survey Results

<u>10.</u>	This is the best communication tool we have had.
<u>11.</u>	The continual changes to the travel program make communication with the end users difficult. Implement changes in groups and we can communicate that to the arrangers.
<u>12.</u>	Need more communication about the financial position of the University.
<u>13.</u>	Communication can be improved immensely by responding to email and voice mail messages. When emails are sent from Business & Finance they are addressed vaguely. As a Business Manager, it would be helpful to know if other employees in my division also received the email.
<u>14.</u>	The change to travel has somewhat overwhelmed discussion. Would like to look forward to other Best Practices.
<u>15.</u>	Work on bringing in newly hired people to the Business Manager meetings.
<u>16.</u>	I really got a lot out of the meetings I have attended. It is always well attended every time I have come.
<u>17.</u>	A better appreciation of the demands on our time with more timely notification of meetings.
<u>18.</u>	Communication is sometimes fine, then inconsistent. In general, communication to the University community on the whole is poor...we cannot rely on a website/newslink to communicate important information, though they are a necessary part of communicating. Information needs to be e-mailed as well always with links to the informational sites.
<u>19.</u>	It would helpful to remember when explaining that there are new people attending regularly. The information seems to be presented on a level of assuming everyone knows the background. Possibly remind us regularly of the brown bag sessions.
<u>20.</u>	Communication was essential but unavailable was the day the bi-weekly direct deposit paychecks didn't go through. It was terrible that a University wide e-mail and/or phone message was not sent to let people know the problem existed and was being addressed.
<u>21.</u>	Provide a weekly/periodic e-mail with "news bites" similar to Newslink but specifically directed to the attendees of these meetings.
<u>22.</u>	These meetings are setting a general positive atmosphere for better communication among different divisions. Please continue to encourage collaborative information and communication between departments (especially FINANCE). They have a very tough job and I believe sometimes that department doesn't always understand that the general intent is to submit and complete things in a timely and correct fashion. The implementation of Banner at all levels as massively INCREASED workloads and stress! The learning curve for Banner and University policies and procedures is on-going and apparently forever!
<u>23.</u>	Provide an email address of someone that we can contact to ask questions that we don't want to ask in front of the entire group.
<u>24.</u>	Sponsored Programs is a must. The initial Business Manager training session when someone is hired is a must as well.

FY2006 Business Manager Survey Results

15. The following topics/updates have assisted me in doing my job better . . .

	Very Helpful	Helpful	Neutral	Somewhat Helpful	Not Helpful	Response Average	N/A to my job
Travel	45% (46)	43% (44)	7% (7)	4% (4)	2% (2)	1.76	5
Purchasing	34% (36)	42% (44)	12% (13)	8% (8)	5% (5)	2.08	2
Payroll	31% (31)	46% (46)	16% (16)	5% (5)	1% (1)	1.98	8
Accounts Payable	20% (21)	42% (44)	27% (29)	9% (10)	2% (2)	2.32	2
Financial Planning & Budget	24% (24)	34% (33)	32% (31)	5% (5)	5% (5)	2.33	9
Sponsored Programs	15% (12)	33% (26)	32% (25)	9% (7)	11% (9)	2.68	28

(skipped this question) 5






Total Respondents 108

16. What topics/speakers would you recommend for future meetings? (Check all that apply)

	Response Percent	Response Total
Information Technology	57%	61
Compensation	39.3%	42
Hiring and Termination Process	47.7%	51
E-PAF	47.7%	51
Professional and Organizational Development	37.4%	40
Financial Services and HSC Finance Office Document Review	65.4%	70
Adhoc Financial Reporting	50.5%	54
Banner and Upcoming Enhancements	77.6%	83
View List other topics here:	11.2%	12
Total Respondents		107
(skipped this question)		6

FY2006 Business Manager Survey Results

16A. What topics/speakers would you recommend for future meetings?	
<u>1.</u>	Direction of Purchasing, Accounts Payable, and HSC Finance.
<u>2.</u>	Updates on hiring FWS students.
<u>3.</u>	It would be good to hear and meet new HR staff. Time management.
<u>4.</u>	University financial position and endowment status.
<u>5.</u>	Development of a Business Manager Manual detailing workflow descriptions, contacts, etc.
<u>6.</u>	Enhanced reporting on purchasing efforts (including improved communication and implementation strategies).
<u>7.</u>	Budgeting & Accounting training classes
<u>8.</u>	Need a checklist for certain positions for forms that need to be filled out for new hires. It would be helpful to have a list of names for your department of people you can contact regarding questions you have to do your job.
<u>9.</u>	How Purchasing chooses exclusive vendors.
<u>10.</u>	Note that news and changes should be announced but that TRAINING should be offered in a different venue.
<u>11.</u>	Help with E-PAF.
<u>12.</u>	More Sponsored Programs and Federal Requirements training opportunities

17. How satisfied are you with the Business Manager meetings?			
		Response Percent	Response Total
Very Satisfied		21.5%	23
Satisfied		59.8%	64
Neutral		11.2%	12
Somewhat Satisfied		5.6%	6
Not Satisfied		1.9%	2
Total Respondents			107
(skipped this question)			6

FY2006 Business Manager Survey Results

18. Please provide any additional comments relating to the Business Manager meetings.	
<u>1.</u>	It is useful to learn the latest updates in procedures and forms, and what will be coming down the road. I also like meeting the people who work in Business and Finance to put a face with a name, and to meet the newly hired people.
<u>2.</u>	I have just been added to the Business Managers' list and have not yet attended any meetings. I will definitely attend in the future.
<u>3.</u>	This is the first consistent sharing of ideas between managers and I hope that continues.
<u>4.</u>	These meeting have been a giant step in improving communications between departments.
<u>5.</u>	I am thankful that these meetings are available, as this is the first time I actually feel as though I know, campus wide, what is going on. The opportunity to meet and mingle with other business managers has been refreshing. It would be nice if there were meetings in which we broke into groups and brainstormed ideas or shared more with each other how we handle certain issues in our offices.
<u>6.</u>	I think the meetings you have are very informative for all of us.
<u>7.</u>	A great start. Looking forward to the meetings next year and the opportunity to network more with other business managers.
<u>8.</u>	Better manage individual tangents. N=2
<u>9.</u>	The timing of the meetings and the topics for discussion are occasionally at a critical deadline, i.e. budget crunch time. Helpful to schedule around such deadlines - keeping in mind there are different deadlines for the different locations. One doesn't want to miss the meeting because the subject matter discussions provide good information.
<u>10.</u>	Very helpful and informative.
<u>11.</u>	Meetings often run over two hours.
<u>12.</u>	The varied locations (alternating between north and south campus) is important and should be continued. Attendance by the University leaders should be encouraged, with them presenting some topic, even for 10-15 minutes with some question and answer period, one time every quarter. This is an incredible opportunity for Fr. Biondi and the Provost to speak on important issues to the University management group.
<u>13.</u>	I think the Business Managers' meetings are a great idea and once I get a grasp of the big picture I'll benefit more from the information provided. It would be helpful if there was more basic info available while we're still in the learning curve.
<u>14.</u>	Many of the topics in FY06 directly related to my job as Admin Assistant. Much of the information I've received has been very beneficial.
<u>15.</u>	A quicker pace would be helpful.
<u>16.</u>	I've felt more like it is a place for Business Managers to go and sit for 2 hours and be told things that could be said just as well in an announcement e-mail. A meeting is when you get together to discuss certain topics - discuss problems - attempt to plan for future events.
<u>17.</u>	There needs to be a two to four day boot camp for all new business managers before they start there perspective job. A chance to know all the different business and finance departments and contact people. An introductory course on what needs to be done in certain situations would be very helpful.
<u>18.</u>	These sessions over all have been very good. The travel round table was the best discussion of all the travel discussions.
<u>19.</u>	I always come away with something valuable but the meetings are too long.