AGENDA

SLU Business Manager Meeting
August 9, 2007
Busch Student Center Room 172
9:00- 10:30am

1) Meeting Overview/Announcements: Linda Pizzo (10 minutes)
   • Sign in Sheet
   • Next Meeting September 13, Medical School LH – A

2) Presentation by Michael Dockter, Vice-Provost for Research & Chief Research Officer, followed with Q & A (30 minutes)

3) eSeePCON Post Release Review: Stacey Barfield (15 minutes)

4) eSeeIDO Implementation Timeline: Linda Pizzo and Lisa Zoia (15 minutes)

5) Planning for FY2008 meetings and setting goals based on FY2007 Business Manager Survey results and June roundtable results: Linda Pizzo (20 minutes)
Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, August 9, 2007 in the Busch Student Center room 172.

Business & Finance Staff Present:

Bruce Andres   Stacey Barfield   LaDonna Davis   Mary Drexl
Sharon Gajewski  Greg Haney   Jeff Hovey   Lee Kneibert
Tom Meadows  Linda Pizzo   Jackie Siebert  Lisa Zoia

HR Staff Present:

Guest Speaker:  Michael Dockter

Number of Business Managers Present: 64

Linda Pizzo welcomed everyone to the meeting. Next month’s meeting will be held on September 13 at the HSC Campus, Medical School, Lecture Hall A. Please check the meeting schedule for the location of all future meetings. Next month’s meeting will include an “after action review” of the budget process to obtain feedback from the business managers in ways to improve the process. There will also be a brief presentation by the Treasurer’s office on the new Touchnet program, and Sponsored Programs will make a presentation to the Business Managers.

Two new business managers were in attendance, Kate Goodman, Business Manager for Human Resources and Richard Lauman, Business Manager for Anesthesiology.

Michael Dockter, Chief Research Officer addressed the business managers giving an overview of how Saint Louis University is working to become the number one Catholic Research University in the country. Mr. Dockter is heading up The Office of Research or “TOR” Currently SLU is ranked 2nd, behind Georgetown, in dollars spent on research. Dr. Dockter is in the process of reorganizing the entire research effort campus wide. More streamlined services and better use of resources will allow SLU to continue to excel in its research efforts. Currently of the 1200 plus faculty members only 200 are engaged in research. That number needs to rise to achieve the goals of TOR. The new Research Building will be opening in September. Click here to view the entire presentation.

eSeePcon – Stacey Barfield addressed the business managers to answer any questions or concerns regarding the new Pcon report that is available. It was requested for confidentiality reasons that access to the new report be able to be broken down by Fund-Org security rather than Banner HR-Org security. Currently various departments may be able to see position budgets of positions that they do not own if an employee’s salary is erroneously charged thereto. The department would like to see the employee’s name as well as the position budget and encumbrance. Stacey will see if this can be addressed without breaching salary security.

eSeeIDO  - Programming continues for the on-line IDO. An initial review will take place August 15 with demo teams reviewing the process on 8/22 and 8/23. Testing will begin on September 4 and the process should go live October 1st. Linda Pizzo stated that the on-line IDO is very user friendly and there will be minimal training involved.
**Survey Results** - Linda Pizzo reviewed the Business Manager’s survey results from FY07 and then reviewed a comparison from the FY06 survey, to the FY07 survey results. Some comments included, more structured Brown Bag sessions, changing the What’s New format to a one page document rather than having to click and open other documents for more details. Several communication changes were suggested:

- Communicate a change BEFORE implementing the change.
- Expand distribution of information beyond the Business Manager’s, possibly using the WebFocus users’ group for a distribution list.
- Communicate directly to affected parties on all major issues.
- Update the appropriate policy on the website when a policy change is made.

**Future Meetings** - New financial reporting is on the fast track beginning with demos the week of 8/20 – 8/24. This should be introduced in mid-October.

If you would like to be notified of upcoming Brown Bag sessions, please contact Jean Riley (riley@slu.edu) 977-2532 on the Frost campus and Marie Reynolds, (reynolmo@slu.edu), 977-9202 on the HSC campus.

Linda Pizzo adjourned the meeting at 10:25 a.m.
Minutes respectfully submitted by Mary Drexl.
## FY06/FY07 Comparison of Business Manager Survey

<table>
<thead>
<tr>
<th>FY06</th>
<th>FY07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responses</td>
<td>113</td>
</tr>
<tr>
<td>Response Rate</td>
<td>72%</td>
</tr>
</tbody>
</table>

1. Have you attended Banner brown bag sessions?

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>58.4%</td>
<td>41.6%</td>
</tr>
<tr>
<td>2007</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Very Useful</th>
<th>Useful</th>
<th>Neutral</th>
<th>Somewhat Useful</th>
<th>Not Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>34.4%</td>
<td>48.4%</td>
<td>14.1%</td>
<td>3.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2007</td>
<td>27.9%</td>
<td>46.5%</td>
<td>14.0%</td>
<td>11.6%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

3. I attended brown bag sessions at . . .

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>North Side of Campus</th>
<th>HSC Side of Campus</th>
<th>Both Sides of Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>17.2%</td>
<td>60.9%</td>
<td>21.9%</td>
</tr>
<tr>
<td>2007</td>
<td>23.3%</td>
<td>69.8%</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

4. My title is . . .

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Business Manager or Manager</th>
<th>Financial Coordinator or Coordinator</th>
<th>Assistant Director or Director</th>
<th>Admin. Assistant (including SR)</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>32.7%</td>
<td>15.5%</td>
<td>20.9%</td>
<td>10.9%</td>
<td>20.0%</td>
</tr>
<tr>
<td>2007</td>
<td>25.6%</td>
<td>20.9%</td>
<td>11.6%</td>
<td>19.8%</td>
<td>22.1%</td>
</tr>
</tbody>
</table>

5. During FY07, I attended . . .

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Less Than 4 Meetings</th>
<th>4-8 Meetings</th>
<th>More Than 8 Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>25.5%</td>
<td>40%</td>
<td>34.5%</td>
</tr>
<tr>
<td>2007</td>
<td>24.4%</td>
<td>43.0%</td>
<td>32.6%</td>
</tr>
</tbody>
</table>

6. The following speakers/topics were informative and useful to me in my work . . .

<table>
<thead>
<tr>
<th>2007 Only</th>
<th>Very Useful (1)</th>
<th>Useful (2)</th>
<th>Neutral (3)</th>
<th>Somewhat Useful (4)</th>
<th>Not Useful (5)</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Speakers</td>
<td>20.9%</td>
<td>51.2%</td>
<td>22.1%</td>
<td>3.5%</td>
<td>2.3%</td>
<td>2.15</td>
</tr>
<tr>
<td>Functional Areas (HR,</td>
<td>45.3%</td>
<td>40.7%</td>
<td>10.5%</td>
<td>3.5%</td>
<td>0.0%</td>
<td>1.72</td>
</tr>
</tbody>
</table>

Updated 12/18/08
7. The meeting format and general content . . .

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Are Fine, no change needed</th>
<th>Could Be Improved</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>63.6%</td>
<td>36.4%</td>
</tr>
<tr>
<td>2007</td>
<td>77.9%</td>
<td>22.1%</td>
</tr>
</tbody>
</table>

8. How useful is the information provided in the monthly issues of “What’s New”?

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Very Useful</th>
<th>Useful</th>
<th>Neutral</th>
<th>Somewhat Useful</th>
<th>Not Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>2007</td>
<td>50.0%</td>
<td>39.5%</td>
<td>8.1%</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

9. Has communication improved over the past year?

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Yes</th>
<th>Somewhat</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>69.4%</td>
<td>27.8%</td>
<td>2.8%</td>
</tr>
<tr>
<td>2007</td>
<td>69.8%</td>
<td>27.9%</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

10. What topics/speakers would you be interested in at future meetings?

<table>
<thead>
<tr>
<th>Topic</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upcoming Enhancements (such as the on-line IDO &amp; DPV process)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Financial Services and HSC Finance Office Document Review</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Hiring and Termination Process</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Optional Topics at the end of Meetings (such as Sponsored Programs, Amex Cards)</td>
<td>4</td>
<td>N/A</td>
</tr>
<tr>
<td>Adhoc Financial Reporting</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Compensation</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>E-PAF</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Banner</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Information Technology</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Budgeting</td>
<td>10</td>
<td>N/A</td>
</tr>
<tr>
<td>Professional and Organizational Development</td>
<td>11</td>
<td>9</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Highly Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
<th>Somewhat Satisfied</th>
<th>Not Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>21.5%</td>
<td>59.8%</td>
<td>11.2%</td>
<td>5.6%</td>
<td>1.9%</td>
</tr>
<tr>
<td>2007</td>
<td>30.2%</td>
<td>54.7%</td>
<td>12.8%</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>
Goals:

To make Saint Louis University the finest Catholic University

To make Saint Louis University the finest Catholic RESEARCH University
Research Data (Scorecard)

How have we been doing?
Total Grant Dollars Submitted

Fiscal Year

- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006

$-
$50,000,000
$100,000,000
$150,000,000
$200,000,000
$250,000,000
$300,000,000
$350,000,000
$400,000,000

$200,000,000
$250,000,000
$300,000,000
$350,000,000
$400,000,000
SLU Research F&As

Fiscal Year

2000 2001 2002 2003 2004 2005 2006
So where are we?

<table>
<thead>
<tr>
<th>Rank</th>
<th>University</th>
<th>Fundraising</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Georgetown</td>
<td>$148 mil</td>
</tr>
<tr>
<td>2</td>
<td>Saint Louis University</td>
<td>$58 mil</td>
</tr>
<tr>
<td>3</td>
<td>Notre Dame*</td>
<td>$52 mil</td>
</tr>
<tr>
<td>4</td>
<td>Loyola University Chicago</td>
<td>$50 mil</td>
</tr>
<tr>
<td>5</td>
<td>Boston College</td>
<td>$33 mil</td>
</tr>
<tr>
<td>6</td>
<td>Wheeling Jesuit University</td>
<td>$27 mil</td>
</tr>
<tr>
<td>7</td>
<td>Fordham University</td>
<td>$14 mil</td>
</tr>
<tr>
<td>8</td>
<td>University of Detroit Mercy</td>
<td>$13 mil</td>
</tr>
<tr>
<td>9</td>
<td>University of San Francisco</td>
<td>$11 mil</td>
</tr>
<tr>
<td>10</td>
<td>Gonzaga University</td>
<td>$7 mil</td>
</tr>
<tr>
<td>11</td>
<td>Marquette</td>
<td>$7 mil</td>
</tr>
<tr>
<td>12</td>
<td>Saint Joseph’s University</td>
<td>$6 mil</td>
</tr>
<tr>
<td>13</td>
<td>Loyola College in Maryland</td>
<td>$6 mil</td>
</tr>
<tr>
<td>14</td>
<td>University of Scranton</td>
<td>$6 mil</td>
</tr>
<tr>
<td>15</td>
<td>Loyola Marymount University</td>
<td>$5 mil</td>
</tr>
<tr>
<td>16</td>
<td>John Carroll University</td>
<td>$5 mil</td>
</tr>
<tr>
<td>17</td>
<td>Fairfield University</td>
<td>$5 mil</td>
</tr>
<tr>
<td>18</td>
<td>Loyola University New Orleans</td>
<td>$4 mil</td>
</tr>
<tr>
<td>19</td>
<td>Regis University</td>
<td>$4 mil</td>
</tr>
<tr>
<td>20</td>
<td>Santa Clara University</td>
<td>$3 mil</td>
</tr>
</tbody>
</table>
Major Initiatives

• Reorganization of The Office of Research (TOR)
• Research information processing overhaul/issues
• The SLU centers and institutes
• Pressing research infrastructure issues
• Embedding the research agenda into academic affairs
• Community outreach programs
• Implementation of research communications plan
Reorganization of The Office of Research
Reorganization of The Office of Research

- Creation of a new Associate Vice Provost of Research position
- Inclusion of Sponsored Programs into The Office of Research
- Hiring of pre-award director
- Evaluations of all TOR staff
- Reassignment of responsibilities and right-sizing of Frost and Medical Center offices
- Formation of college/school research teams of pre/post/translation personnel
- Consolidation of office locations
Next Month
Research Information Processing Overhaul/Issues
Research Information
Processing
Overhaul/Issues

- Sponsorship of Banner Grants module
- Pre and post-award process mapping
- Application of Banner best practices
- Consolidation of legacy research databases
SLU Centers and Institutes

- Evaluation of Centers of Excellence
- Establishment of new Centers of Excellence
- Evaluation and recommendations for existing Centers and Institutes
Four New Centers of Excellence Announced in April

by Michael Dockter, Ph.D.
Vice Provost for Research

The Academic Funding Opportunities competition resulted in the selection of four Centers of Excellence: Center for Environmental Science, Center for Aging Successfully, the Walter J. Ong, S.J. Center for Language and Culture, and Center for Medieval and Renaissance Studies.

In November of 2006, the President funded a $1,000,000 academic initiative to enhance the University’s image and reputation. With the support of the Deans and Directors, the Provost issued a request for proposals that focused on development of interdisciplinary programs or special projects with special merit. As characterized by Dr. Michael Dockter, Chief Research Officer for Saint Louis University:

The Centers of Excellence Program should reflect our university’s foci on research excellence. The Centers embody the interdisciplinary, inter-collegiate, and inter-institutional elements that we value, and have regional, national and international scope. Investment in these programs allows the University to leverage federal, state, and private dollars, and enhances its image as a major research University. The return on investment, moreover, is of great significance to the University and to the community that we serve.
Research Infrastructure Issues

• Research Space Issues
  – New Research Building
  – Renovation of Caroline space
  – Evaluation of all University’s research space
  – Space for SLU early start-up companies

• Evaluation of major research equipment needs

• Evaluation of campus core laboratories
Embedding the Research Agenda into Academic Affairs

- Set up research metrics for evaluating SLU schools/colleges
- Become actively involved in the recruitment process for new faculty, chairs and deans
- Drive the research agenda into the faculty evaluation system
Community Outreach Programs

• Establishment of formal research relationships with our major research partners
  – Universities
  – Local businesses
  – Hospitals
  – Government entities
  – Start-up sector

• Engage in federal appropriations process
Implementation of Research Communication Plan

• Develop a comprehensive plan for communicating research goals and benchmarks to the general university community
• Develop a plan for communicating research goals and benchmarks to university leadership
• Develop a plan for communicating research goals and benchmarks to the faculty
• Develop a scorecard for success
What are the next steps?

• Undergraduate Research
• Responsible Conduct in Research (Education and Certification)
• Further Consolidation of Research Administrative Functions
This is a paid advertisement!

Job Opening – The Office of Research – Business Manager

F.Y.I.
Thank You!

Questions and Discussion?

Mike Dockter
Vice Provost for Research
August 9, 2007
FY2007 Business Manager
eSeeIDO
Implementation Timeline

Business Manager’s Meeting
August 9, 2007
## eSeeIDO Implementation Timeline

<table>
<thead>
<tr>
<th>Completed</th>
<th>System Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 30</td>
<td></td>
</tr>
<tr>
<td><strong>July 1 - August 15</strong></td>
<td>Initial Programming</td>
</tr>
<tr>
<td><strong>August 15</strong></td>
<td>B&amp;F Initial Review</td>
</tr>
<tr>
<td>Weeks of Aug 13, 20 and 27</td>
<td>Work with Service Depts. to outline processes and requirements</td>
</tr>
</tbody>
</table>
eSeeIDO Implementation Timeline

<table>
<thead>
<tr>
<th>Date/Time Frame</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 22 or 23</td>
<td>Demo system to IDO Advisory Team for their review and feedback</td>
</tr>
<tr>
<td>Week of Sept 4</td>
<td>Acceptance Testing</td>
</tr>
<tr>
<td>Weeks of Sept 17 and 24</td>
<td>Pilot system with Service Depts. and a group of end users</td>
</tr>
<tr>
<td>Oct 1</td>
<td>Go Live!</td>
</tr>
</tbody>
</table>
FY2007 Business Manager Survey Findings

Business Manager’s Meeting
August 9, 2007
Banner Brown Bag

- Could use more structure
- Should be canceled if no pertinent info to discuss – turns into complaint session
- Go over What’s New and recent changes
Format of Meetings

• 78% indicated no change needed
• Suggested Changes
  – Allow more time for questions
  – More interaction among Bus. Mgrs. (a few indicated the opposite and preferred an all presentations format)
  – MC vs. Frost – be aware of differences
  – Time Change – but conflicting suggestions
What’s New

• Change to single format with headlines
• Announce, then implement
• Update policy with all announced changes
• Some announcements could be clearer – review at meetings, Q&A for those with more questions
Communication

• Communication prior to implementing changes
• Improve documentation/web site
• Expand distribution (trickle down)
• When there is a “big” communication, email it directly to affected parties
• Ability to track status of all processes (EPAF, ETERV, Others incl. new)
Topics/Speakers – Top Five

1) Upcoming Enhancements
2) Financial Services and MC Finance Document Review
3) Hiring and Termination Process
4) Optional Topics at the End of Meetings
5) Adhoc Financial Reporting
Topics/Speakers

- Others Added
  - Sponsored Programs
  - Faculty Hiring Process
- Order of most useful (informative) last year (1- Very Useful, 5-Not Useful)
  1) Functional Areas (1.72)
  2) B&F Representatives (1.79)
  3) Executive Speakers (2.15)
  4) Roundtable Discussions (2.41)
Overall Satisfaction

- 85% are highly satisfied or satisfied compared to 81% last year
- 30% highly satisfied vs. 22% last year
Summary

• Possible changes to BBB to re-energize
• Meeting Format
  – Include some roundtable
  – Optional topics
  – Optional Q&A after meetings
• Enhance Format of What’s New
Summary

- Communication
  - Before changes are implemented
  - Improve documentation/web-site
  - Expand distribution of What’s New
  - More directed communication for key changes
Questions/Comments