

## AGENDA

SLU Business Manager Meeting  
March 8, 2018  
Busch Student Center, Rm 253 A-C  
9:00a.m.-10:30a.m.

1. Announcements –Sign in Sheets
  - Introduction of New Employees
  - Future Business Manager Meetings
    - Solicit input on future meeting topics
    - [budgetoffice@slu.edu](mailto:budgetoffice@slu.edu) or [samantha.n.myers@slu.edu](mailto:samantha.n.myers@slu.edu) or 7-3920
    - June 14, 2018 LRC Auditorium B

Updates from the following areas:

2. Capital Campaign - Stephanie Nigh, Development Office
3. Contract Management Services - Ellen Borowiak, Business Services and Susan Caldwell, SLUcare Admin
4. Purchasing - Jake Prange, Business Services
5. Bicentennial – Laura Geiser, Brand Management
6. F19 Budget - Brianne Burcke, Financial Planning & Budget



# Campaign Update

## March 8, 2018



# Campaign Progress

Working Goal = \$500,000,000

✦ Raised to Date = \$188,282,977

✦ Verbal = \$65,129,000

✦ Pending = \$48,583,583



# Gift Pyramid Progress

| Range         | Dollars Raised Amount   | Range Goal Count | Dollars Raised Count | Range Goal Amount    | % to Goal Amount |
|---------------|-------------------------|------------------|----------------------|----------------------|------------------|
| \$50,000,000  | \$ .00                  | 1                | 0                    | \$50,000,000         | .0%              |
| \$25,000,000  | \$ .00                  | 2                | 0                    | \$50,000,000         | .0%              |
| \$10,000,000  | \$25,000,000.00         | 5                | 2                    | \$50,000,000         | 24.0%            |
| \$5,000,000   | \$11,405,183.09         | 10               | 2                    | \$50,000,000         | 22.8%            |
| \$2,000,000   | \$12,542,502.36         | 25               | 7                    | \$50,000,000         | 25.1%            |
| \$1,000,000   | \$18,040,654.52         | 50               | 15                   | \$50,000,000         | 36.1%            |
| \$500,000     | \$26,288,616.42         | 100              | 42                   | \$50,000,000         | 52.6%            |
| \$100,000     | \$34,844,438.12         | 250              | 200                  | \$25,000,000         | 139.4%           |
| \$50,000      | \$12,909,866.64         | 300              | 208                  | \$15,000,000         | 86.1%            |
| \$25,000      | \$11,574,350.85         | 400              | 369                  | \$10,000,000         | 115.7%           |
| \$10,000      | \$11,774,298.92         | 500              | 848                  | \$5,000,000          | 235.5%           |
| < \$10,000    | \$22,683,832.36         | 100,000          | 82,227               | \$95,000,000         | 23.9%            |
| <b>Totals</b> | <b>\$187,063,743.28</b> | <b>101,635</b>   | <b>83,920</b>        | <b>\$500,000,000</b> | <b>37.4%</b>     |



# Milestone Goals

- ✦ \$150 Million by July 1, 2017
- ✦ \$280 Million by July 1, 2018
- ✦ \$500 Million by July 1, 2020



# Campaign Priorities

- ✦ Academic Excellence = \$66,121,651
- ✦ Athletics = \$9,569,181
- ✦ Business Education = \$26,504,994
- ✦ Health & Medicine = \$44,321,312
- ✦ Scholarship = \$41,765,837



# Public Phase

- ✦ Faculty/Staff Campaign

  - ✦ August 2018

- ✦ Campaign Kick-off Gala

  - ✦ Saturday, November 17, 2018

  - ✦ Chaifetz Arena

# Questions?





# **Agiloft Contract Management System**

University wide system to automate contract reviews, approval and signature.

Contracts from all University units are to be routed through the system, excluding faculty employment contracts.

# **Agiloft Contract Management System**

## **Agiloft Core Team**

- Ellen Borowiak, Contracts Program Mgr, Business Services
  - Susan Caldwell, Contracts Manager, SLUCare
  - Blythe Burkhardt, Associate General Counsel OGC
  - Christina Moore, Associate General Counsel OGC
- Alexis Bruce-Staudt, Ex. Director Research GO Center
  - Jackie Manikham, Project Manager, ITS
  - Elizabeth Cooley, Dir. Of Compliance, Compliance
  - Jeff Hovey, Sr. Director, Business Services
- Jake Prange, Contracts Manager, Business Services

# **Agiloft Contract Management System**

## **Current Contracting Process**

- Non standard intake and reviews across various units
  - Difficult to track existing contracts with multiple contract management systems across campus
- Contracts executed without the appropriate reviews or authority

# **Agiloft Contract Management System**

- Agiloft selected after RFP process in Fall, 2017
- Kick Off meeting held October 19, 2017
- Goal of pilot group go live in May, 2018
  - Phased roll out over Summer, 2018



SAINT LOUIS  
UNIVERSITY

## Custom Portal

User: contractcreator1 | Logout

Home New View My Profile

### Create a Contract

Contract

Save Cancel

Details Attachments Renewal / Related Contracts Assets

ID373Contract Number

\*Record TypeContract

Parent Contract IDParent Contract Number

\*Contract Category

\*Contract Type

SLU Requester Demographic Information

\*Requester Namecontractcreator1\*Requester PhoneExt.

\*Requester Email

\*What Business Unit are you submitting this on behalf of?

\*What Division or School are you submitting this on behalf of?

\*DepartmentDepartment Head

What site (or sites) does this contract apply to? Select multiple sites by holding

Powered by Agiloft



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## Custom Portal

User: **contractcreator1** | [Logout](#)

[Home](#) [New](#) [View](#) [My Profile](#)

### Create a Contract

#### Contract Information

\*Contract Title

\*When is this contract effective?

Choose one

\*Contract Term in Months

12

Contract Effective Date



\*Brief Description of Contract

\*Renewal Type

Notify staff to renew

\*Days in advance to notify for renewal

60

General Notes

Contract Party Entry

☒ Existing Company ☐ New Company

Banner ID

Company Name

Street Address

Street Address 2

# **Agiloft Contract Management System**

## **Contract Approval routing based:**

- Contract Type
- Compliance Questions
  - Export controls
  - HIPPA
  - Information Security
  - OGC
  - MARCOM
- Department chair/head approval

# **Agiloft Contract Management System**

System will be able to manage third party contracts and SLU templates

- SSA's
- Affiliation Agreements
- etc.



# **Agiloft Contract Management System**

- Once implemented, contract reviews, approvals and workflows will be automated.
- System will serve as a centralized repository for University contracts.
- New contract management system will have e-Signature capabilities through DocuSign.

# **Agiloft Contract Management System**

## **Questions**

**Ellen Borowiak, 977.7045**

**Ellen.Borowiak@slu.edu**

**Susan Caldwell, 977.6890**

**Susan.Caldwell@health.slu.edu**

# Amazon Business

1. Halted Order Notification
2. Order Lookup
3. Returns
4. Sales Tax

[Store](#) [Details](#) [Contact](#) [Certificates and Documents](#) [Payment](#) [Transactions](#) [Quotes](#) [Comments](#)

## Supplier Purchasing Instructions

Should you have any difficulty, Amazon Customer Service may be reached by phone at (888) 281-3847 or by email at corporate-PunchOut@amazon.com.

## Community Purchasing Instructions

When calling into Amazon Business Customer Service, reference your Amazon Order # (not your SLU PO #).

**Please reference our links to the right to address common Amazon questions and concerns.**

### Links

- [Amazon Order Look-Up](#)
- [Returning an item to Amazon](#)
- [Halted Order Notifications](#)
- [Sales Tax on an Amazon Order](#)



Amazon Business for SLU



Create a Blanket Order »



Request a Quote »



# **BICENTENNIAL UPDATE**

# WHERE DO WE STAND?

200  
YEARS IN ONE  
CHALLENGE

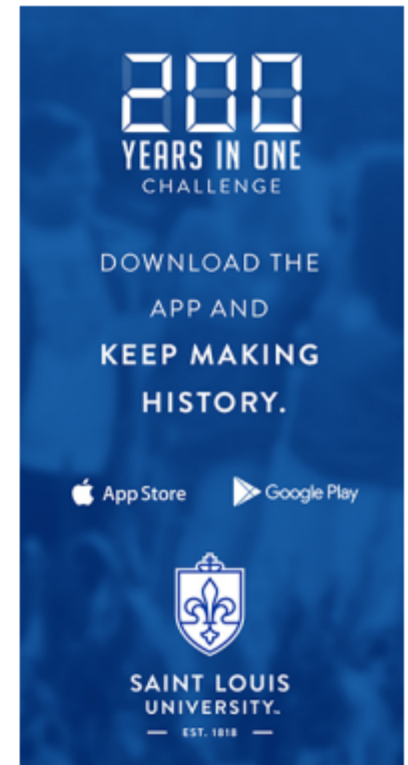
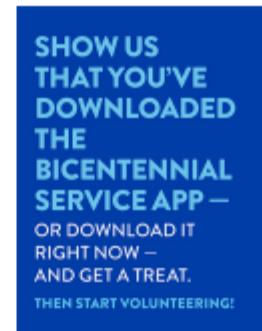


# 200-YEARS-IN-ONE CHALLENGE

- Center for Service and Community Engagement submitting hours
- Partnered with the St. Louis Zoo
- Submit hours directly at **slu.edu/200years** or download in the Apple App Store or Google Play

# CHALLENGE PROMOTIONS

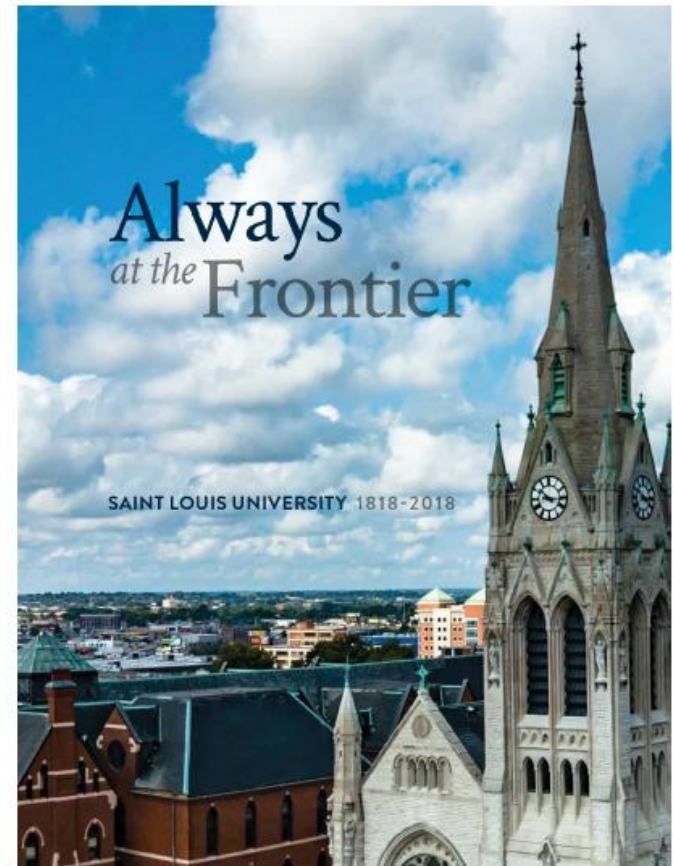
- Billboards and radio
- Google AdWords/digital
- Videos on social media
- Fox Theatre program
- Outreach to students
- Social media/influencers





# BOOK AND EXHIBITION

- Book available now
- SLUMA exhibition open
- Runs through Dec. 30



# 5K RUN and FAMILY FUN WALK

- 8 a.m. Sunday, April 15
- Route through campus
- Benefits Helping Our Own
- Registration is \$25 through March 24; cost increases closer to race



# UPCOMING CONFERENCES

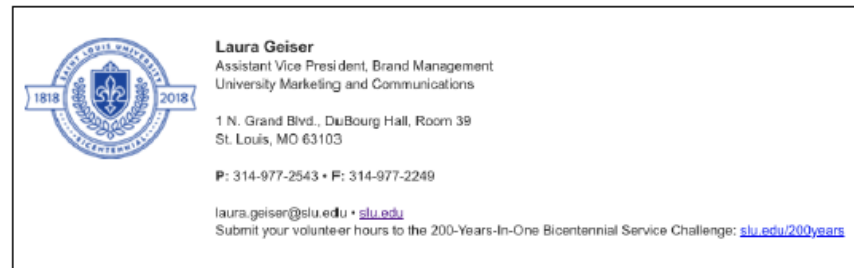
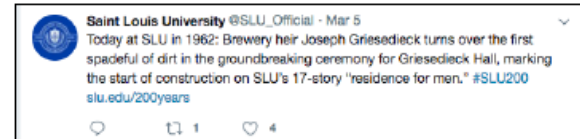
- March 22-23: Intercultural Origins of St. Louis and the Trans-Mississippi West, 1800-1840
- April 17-18: From Selma to St. Louis: Theology and the Pursuit of Justice
- April 22-24: Saint Louis Climate Summit
- Sept. 13-15: Health and Social Justice Bicentennial Conference

# UPCOMING EVENTS

- June 18-23: Student rocket launch in New Mexico
- Aug. 30: Night at Busch Stadium
- Sept. 27-30/Homecoming: Event on Grand, paint by numbers
- Nov. 15: Concluding event at Chaifetz Arena

# OTHER DETAILS

- On this Day at SLU tweets
- Themed commencement materials, screens, etc.
- Themed issues of *Universitas*
- Timeline being installed in Spring Hall
- Bicentennial email signature available





**QUESTIONS?**



# FY19 Budget

- Contractual Increases were due January 26<sup>th</sup>
- Capital requests were due February 23<sup>rd</sup>
- Board of Trustees (BOT) approved merit, tuition, and room & board rate increases at the February 24<sup>th</sup> meeting
- Salary Planner & Finance Budget Screens (FBD) have been loaded and will be unlocked the week of March 5<sup>th</sup>
- Budget Bases will be distributed on March 9<sup>th</sup> and need to be balanced to FBD on or before May 18<sup>th</sup> unless otherwise noted in the Salary & Budget Development Guidelines
- FY19 Budget will be presented to the BOT on May 5<sup>th</sup> for approval

# Changes to the Guidelines

If a **vacant position** will be filled in FY19 and it is below the pay grade minimum, the unit should ensure there is enough budget dollars in the position to hire a candidate. Remaining vacant position compensation pool dollars can be used at the Vice President, Provost or Dean's discretion. Vacant position budgets can be used for market/equity increases for faculty/staff positions that are approved by the respective Vice President, Provost or Dean, and Human Resources. The position budgets for vacant positions that will not be filled should be moved to a "holding position" under the Vice President, Provost, or Dean. Any vacant positions with \$0 budget, excluding pooled positions, will then be closed.



Thank you