Quarterly Business Officers Meeting

September 14, 2023
Today’s Agenda

• Change Management 5 Minute Tip
  – Blair Wagner

• Fleet Services Requisition Rewrite
  – Sherry Reynolds-Miller and Mike Wilson

• Enrollment Updates
  – Brent Gage

• Ethicspoint Updates
  – Chad Sharp

• Faculty Cost Center Assignment & Re-Usage
  – Carolyn Gritton

• Financial Sub-Certification Reminder
  – Rachel McGuire
Most Resistant Groups

- Executives and Directors: 9%
- Senior-Level Managers: 16%
- Mid-Level Managers: 42%
- Frontline Employees: 27%
- Other: 6%
# Why Managers Resist Change

<table>
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<tr>
<th>Reasons</th>
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<td>1 - Organizational culture</td>
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<td>2 - Lack of awareness and knowledge of change</td>
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<td>3 - Lack of buy-in</td>
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<td>4 - Mis-alignment of project goals and personal incentives</td>
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<td>5 - Lack of confidence in their own ability to manage people side of change</td>
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#3 Lack of Buy-In

1. Believed the change would fail or was a **bad solution**
2. Were comfortable with the **status quo**
3. Believed it was out of line with **organizational goals** as they knew them
4. Did not like what the change entailed or **required of them**
5. Feared losing **control, power or status**
6. Did not want **increased visibility or accountability**
Fleet Services
Requisition Rewrite

Sherry Reynolds-Miller, Mike Wilson
Introduction

• Sherry Reynolds-Miller  
  – Project Manager/Senior Business Analyst
• Mike Wilson  
  – Fleet Manager
• Changhui Xu  
  – Lead Developer
What is the Fleet Services Requisition

- A workflow form used for the reservation and approval of short-term vehicle rentals from Fleet Services.

- Located on Employee Self Service in the Parking & Travel Section.
Why Do the Rewrite?

- Old form was not user-friendly.
  - Lack of proper validation messages
  - Sometimes system would lose driver information due to directory changes.
- Old form had high maintenance cost
  - Lack of audit logs and application logs for troubleshooting
  - The legacy framework was challenging to add new features or update user interface to modern look and feel.
- Old form was using legacy workflow, which doesn’t have comparable features as Universal Workflow.
Enhancements From Old Form

- Embedded business rules
- Customer Ability to Submit Change Request
  - Customer can edit request after they have been submitted if any trip details need updated.
Enhancements From Old Form

• Favorites
  - Store and name favorite MFKs
  - Store frequent drivers
  - Store and save staff vehicle information for parking personal vehicles at Fleet Services during trip
Enhancements From Old Form

→ Cost estimate
  • Provide optional mileage estimate and form will calculate the estimated cost.
  • Change vehicle type to compare the cost of two different vehicle types for the same trip.
Enhancements From Old Form

• Outlook calendar entry
  - Click of a button to add reservation date/time to outlook calendar

• Helpful tips/hints throughout the form/application for intuitive and convenient ease of use.

• Training/web tutorial directly available in the application welcome section
### Enhancements From Old Form

- Link on TDR will take user to form to review form details.

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<tr>
<th>GENERAL EXPENSE</th>
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<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Transaction</td>
</tr>
<tr>
<td>Comments</td>
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<tr>
<td>Link</td>
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- On the form you can see total costs, approval path, driver(s), destination, purpose, etc.
Integrations/Technology

- Driver Training – Now linked to training database
- DLRS – Automated emails about driver status
- Universal Workflow
- Bots utilized to interface with Fleet Software to eliminate human error and manual data entry
Questions?
Fall 2023 Enrollment Summary
Quarterly Business Officers Meeting

September 14, 2023
Fall 2023- A Banner Year!

• Total Enrollment
  • 30,042

• New Student Enrollment
  • 4th largest 1st year class in Iowa history (5,064)
  • Nearly 1,100 transfer students
  • 47% non-resident first year students

• Fall 2024 Enrollment Goals
  • Consistency is the goal!

• “The Enrollment Cliff”
  • 2026 will begin the decline in the number of High School seniors
About our new class:

• A very talented class:
  – 3.83 average HS GPA
  – 2,688 arrived with college credit
  – 384 Admitted to the Honors Program

• A diverse group
  – 20% underrepresented students
  – 94 Iowa Counties and 45 states
  – 44 Countries

• Top areas of interest:
  – Business/Pre-Business
  – Engineering
  – Open Major
  – Nursing/Nursing Interest
  – Psychology
2022–23 Visit Numbers

• 14,794 students
  – Every US State but Delaware and Utah
• 20,710 guests

35,504 total visitors!
Campus Tours

5,817 hours of tours given in 2022-23

• Campus Walking Tours
• Residence Hall Tours
• Bus Tours
• Downtown IC Programs
Summer 2023

• Top Scholar Visit Day
  – July 17

• Friday Night Live:
  – July 14
  – July 21
  – August 11

Over 3,900 visitors in July!
Fall 2023

Hawkeye Visit Day & Transfer Day

Over 1,000 visitors on campus:

Friday, October 6
Monday, October 9
Friday, October 13, 20, 27
Friday, November 3, 10

Other Key dates:

Specialized visit programs:

• Gear Up Visit Day: Oct 4
• Pride Alliance Visit Day: Nov 27
• All-State Music Festival: Dec 4
Spaces

Admission Visitors Center Lobby

• Located on the first floor of the Pomerantz Center
• Newly refurbished
• Host admission presentation in stylized classrooms and the Old Capital
• Tours depart twice daily from this location.
• Multiple parking options for prospective students and families
Spaces

Residence Hall Show Room in the IMU!

- Lower level, across from the Hawk Shop
- Built to the exact scale of a double room in our residence halls.
- Features information on dining and hall amenities
- We continue to show lobbies and common areas of residence hall facilities
New for the Fall 2024 cycle

- Financial Aid process will change significantly
  - So will our timelines!
- A new staff member located in Northern Virginia
  - Hoping to continue our growth of interest from East Coast students
- Launching of the STARS Network
  - A network of 16 top colleges working in collaboration to help rural students
- SCOTUS Decision
  - Some processes will need to change, or commitment will not!
Our ask of you...

• This bag is our call to action!
  – Make our guests feel welcome!
  – We are all part of their impression of our campus and community.
  – Greet them and ask if you can be of assistance.

Do we want them to be a Hawkeye for a day or a lifetime?
Thank you

admissions.uiowa.edu
IOWA
The Ethicspoint site provides an anonymous, confidential way to report potential issues.

The university will address reports promptly and discreetly, sharing facts only with personnel needed to investigate and resolve the matter.

GO TO: https://uiowahotline.ethicspoint.com for more information & to file report.
Our Commitment

The University of Iowa recognizes its obligation to its faculty, staff and the community to maintain the highest ethical standards. Policy compliance is a shared responsibility that depends on individuals voicing their concerns.

Confidential and anonymous

This site provides an anonymous, confidential way to report potential issues. The university will address reports promptly and discreetly, sharing facts only with personnel needed to investigate and resolve the matter.

The university will not divulge the identity of a Hotline reporter without consent. No retaliation will be taken against people who report potential policy breaches in good faith.

- Anti-Retaliation Policy
- Resource Handbook for Fiduciary Conduct
- Financial Fraud Policy

Reportable issues

Use this site to report issues related to:

- Financial
- Healthcare Compliance
- Human Resources
- Information Technology
- Intercollegiate Athletics
- Research
- Risk and Safety

https://uiowahotline.ethicspoint.com
ETHICSPOINT – Choose category of concern

File a hotline report
To make a report, select the appropriate category and subcategory below.

Financial
Accounting or auditing matters, falsification of contracts, reports or records, fraud, improper supplier or contractor activity, theft, and all other financial matters.

Healthcare Compliance
Conflicts of interest, HIPAA, and all other healthcare matters.

Human Resources
Confidentiality, conflicts of interest, employee benefit abuse, employee misconduct, and all other human resources matters.

Information Technology
Data privacy, inappropriate use of technology, misuse of resources, software piracy, and all other information technology matters.

Intercollegiate Athletics
Gambling/fraudulent activities, hazing, improper giving of gifts, violations of NCAA regulations, and all other matters involving the university’s intercollegiate athletic department.

Research
Conflicts of interest, grant misconduct, research misconduct, and all other research matters.

Risk and Safety
Abuse of minors, environmental matters, sabotage/vandalism, unsafe working conditions and other risk and safety matters.

https://uiowahotline.ethicspoint.com
Controller's Office

Accounting & Financial Reporting  Capital Assets Management  Financial Analysis  Grant Accounting  Tax Office

Controller's Office

The Controller's Office, a division of Finance and Operations, is comprised of several departments that provide a wide range of business, accounting and reporting services on behalf of, and for, the university community. These services are essential for the University of Iowa to pursue its mission of teaching, research, and public service.

We are committed to providing the highest quality business, accounting, tax and financial reporting that fosters integrity and accountability while maximizing efficiency, accuracy, and productivity.

We accomplish this by giving guidance in accounting, financial reporting, tax compliance, and grant financial administration.

Fraud Prevention

- University’s Fraud Policy
- How to Report Fraud
- Scan this QR code to Report Fraud

Controller.fo.uiowa.edu
If You Suspect Fraud...
- Do not confront the suspect
- Do not investigate the situation yourself

To Report Fraud:
The University of Iowa has implemented a fraud hotline through Ethics Point, a third party hotline provider, that has automated and anonymous reporting mechanisms in place to bring forward misconduct issues and concerns across campus. You may file a report by:
- Calling 1-866-384-4277
- Going to the University of Iowa’s Ethicspoint website
- Going to the University of Iowa’s Ethicspoint mobile website (or scanning the QR code to the left)

The hotline is managed by the Office of Internal Audit and all reports are investigated as promptly and discreetly as possible with the facts made available only to those who need to investigate and resolve the matter. Ethics Point and the University are committed to safeguarding the confidentiality of individuals who submit reports and University policy prohibits the taking of any retaliatory action against anyone for reporting or inquiring about potential misconduct.

Learn more about fraud and how to protect the institution and yourself by visiting the Association of Certified Fraud Examiner’s website.
Fraud Triage Committee

Josey Bathke
Zach Furst
Deb Johnston
Terry Johnson
Rachel McGuire
Jamie Jorgensen

Chad Sharp
Doug Vance
Jan Waterhouse
Lucy Wiederholt
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Thank you

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For more information on the Office of Internal Audit, please visit our website at [https://audit.org.uiowa.edu/](https://audit.org.uiowa.edu/)
Thank you
IOWA