
Quarterly Business Officers Meeting

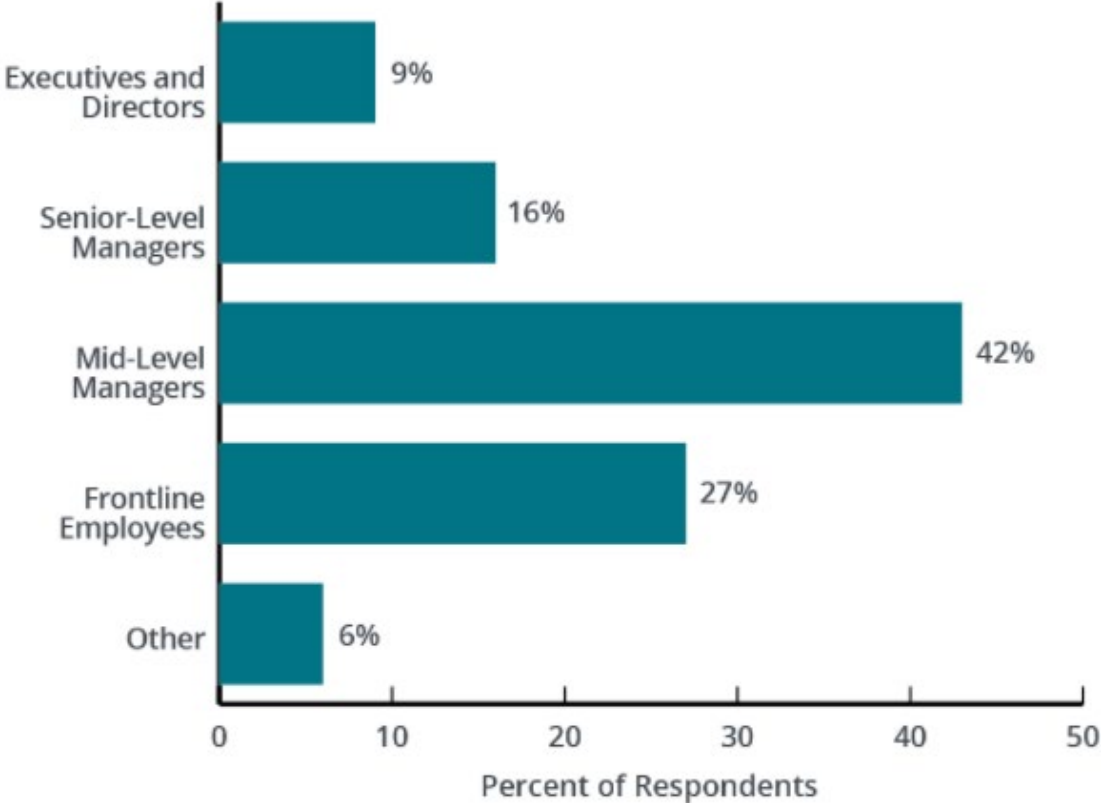
September 14, 2023

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

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University Human Resources – Organizational Effectiveness

Why Managers Resist Change

Reasons

- 1 - Organizational culture
- 2 - Lack of awareness and knowledge of change
- 3 - Lack of buy-in
- 4 - Mis-alignment of project goals and personal incentives
- 5 - Lack of confidence in their own ability to manage people side of change

#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**

University of Iowa Parking and Transportation – Fleet Services

Fleet Services Requisition Rewrite

Sherry Reynolds-Miller, Mike Wilson

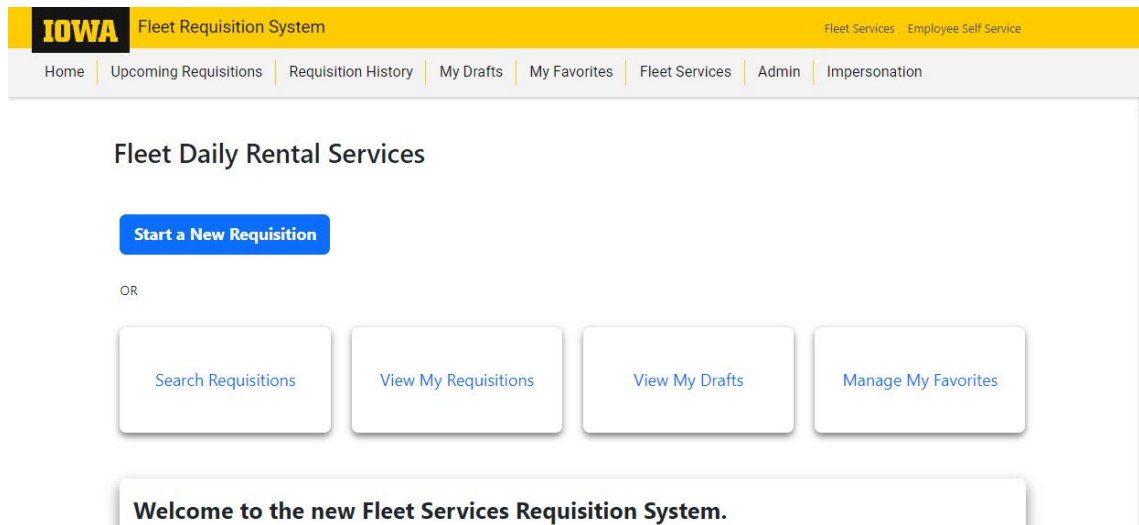
Introduction

- 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 needs updated.

Home | **Upcoming Requisitions** | Requisition History | My Drafts | My Favorites | Fleet Services | Admin | Impersonation

1 upcoming requisition that has been created by you that has not been picked up yet New Requisition

ReqID: 11425	
Pickup Date 09/11/2023 →	Return Date 09/12/2023
Destination Agency, IA	Primary Driver Reynolds-Miller, Sherry
Confirmation Number Pending (Vehicle)	Workflow Package #13966305 COMPLETE
View Details Download .ics File Edit Clone Cancel	

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

Home | Upcoming Requisitions | Requisition History | My Drafts | **My Favorites** | Fleet Services | Admin | Impersonation

Favorite MFKs | My Frequent Drivers | My Frequent Vehicles

My Favorite MFKs

* You can add a list of favorite MFKs in the system so that you can quickly select them when filling out a requisition form.
* The "Alias" should be unique for each of your favorite MFKs. You can update or remove a favorite MFK if needed.
* The system automatically validates MFKs on Wednesdays, and you will receive an email notification if an MFK becomes invalid.

Add a New Favorite MFK

Alias	MFK	Status	
Fleet	260-05-0355-00030-00000000-6058-000-00000-00-0000	Valid	Update Remove

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.

General Trip Information

Pickup Date 08/22/2023 **Pickup Time** 10 : 00 AM

Return Date 08/25/2023 **Return Time** 10 : 00 AM

Pickup Location Fleet Services Main Office

Business Purpose Conference

Final Destination
 State: IL City: Elmhurst

Estimated Round Trip Miles 425 Miles

Vehicle Class MS Sedan (5 seatbelts) Need I-PASS or K-TAG

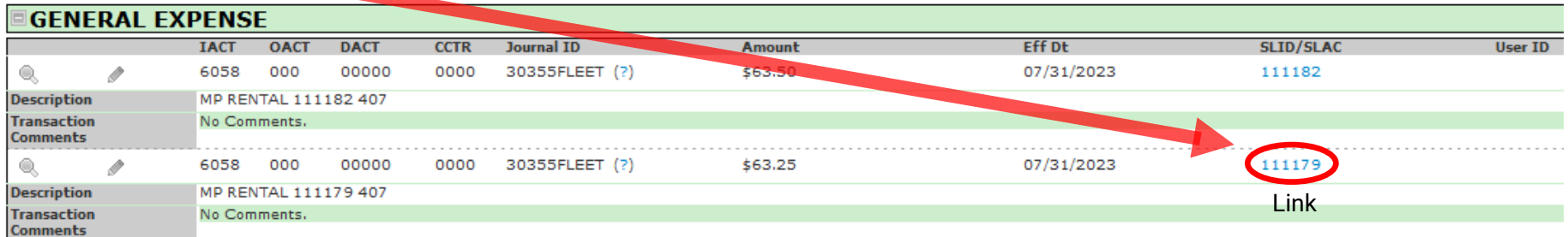
Estimated total charge: \$ 168.75

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.



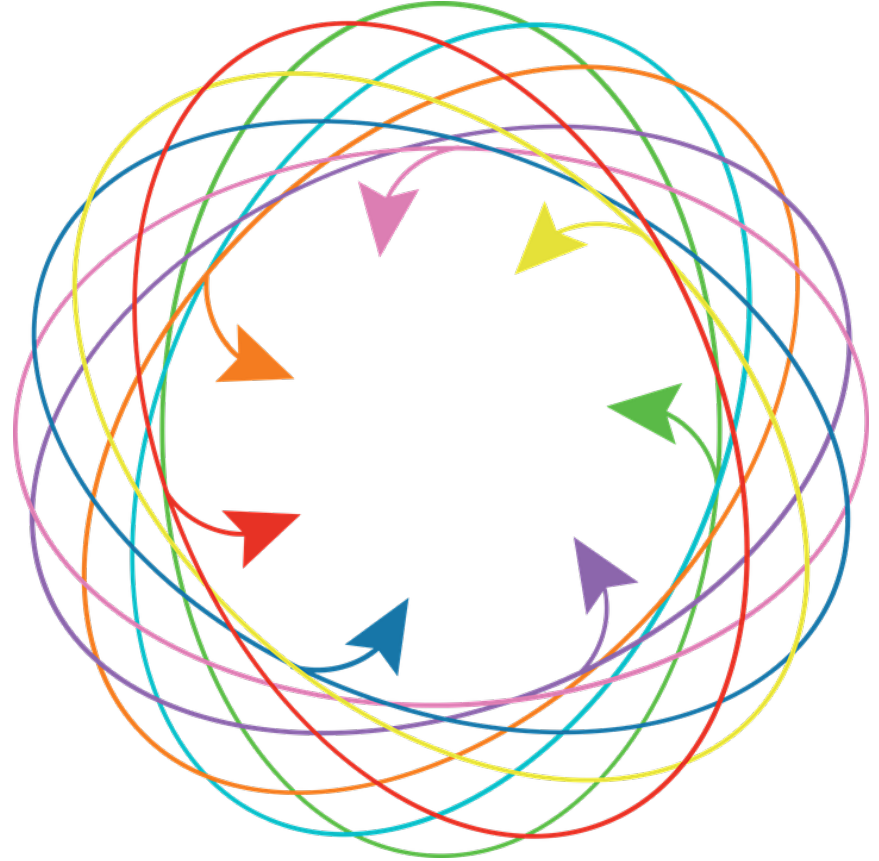
The screenshot shows a table titled 'GENERAL EXPENSE' with columns for IACT, OACT, DACT, CCTR, Journal ID, Amount, Eff Dt, SLID/SLAC, and User ID. There are two rows of data. The first row has a value of \$63.50 and SLID/SLAC 111182. The second row has a value of \$63.25 and SLID/SLAC 111179. A red arrow points from the top row to the circled '111179' value in the second row. Below the second row, the word 'Link' is visible.

GENERAL EXPENSE									
	IACT	OACT	DACT	CCTR	Journal ID	Amount	Eff Dt	SLID/SLAC	User ID
	6058	000	00000	0000	30355FLEET (?)	\$63.50	07/31/2023	111182	
Description	MP RENTAL 111182 407								
Transaction Comments	No Comments.								
	6058	000	00000	0000	30355FLEET (?)	\$63.25	07/31/2023	111179	
Description	MP RENTAL 111179 407								
Transaction Comments	No Comments.								

- 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



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University of Iowa Parking and Transportation – Fleet Services

Questions?

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Enrollment Management

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?



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Enrollment Management

Thank you

→ admissions.uiowa.edu

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ETHICSPPOINT

Business Officers – September 14, 2023

Chad Sharp, Assistant Director of Internal Audit

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ETHICSPPOINT

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.





Confidential Hotline

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

- **File a Hotline Report**
- Follow Up on a Hotline Report
- Or call the Hotline toll-free:
1-866-ETHICSP (866 384 4277)

IN AN EMERGENCY, CALL 911

EthicsPoint is not an emergency service. If you need help in an emergency, call 911.



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.

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ETHICSPPOINT – Mobile Site



<https://uiowamobilehotline.ethicspoint.com>

Controller's Office

[Accounting & Financial Reporting](#) [Capital Assets Management](#) [Financial Analysis](#) [Grant Accounting](#) [Tax Office](#)

Controller's Office

Home

Business Officers

Financial Sub-certification

Commonly Requested Information

Policies, Procedures & Guidelines

Financial & Audit Reports

Business Processes Series

Contact Us

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](#)



Fraud Hotline

Fraud Facts

People who commit fraud are impacted by:

1. Perceived pressure
2. Opportunity
3. Rationalization



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/>

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Thank you

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