

Business Affairs •••• BULLETIN

“Improving the quality of life in the UT Dallas Community”



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FROM LEADERSHIP TO LEAN: Transforming UT Dallas

In our last *Business Affairs Bulletin*, we spent time discussing leadership and the role it plays in advancing the University's agenda. We discussed leadership as being about great processes that lead to great results. This edition focuses on developing the philosophy, culture, and tools to improve those processes. **Lean University** is a concept to advance the development of processes and systems to effectively and efficiently deliver services to our faculty, staff, students, alumni, and community.

Lean is often a symbolic gesture synonymous to efficiency. It is a term used very frequently in the business vernacular, but seldom in higher education. With the growing cost of conducting business in higher education, identifying process improvement opportunities can lead to significant savings in time and resources. These are savings that can be strategically reinvested in critical university needs. Heretofore the resources have not always been available to support the enormous demands that face all of us on a daily basis.

In a world where inactivity has led to a generation of individuals who are challenged by fluctuations in weight, **lean** has a somewhat different meaning. Yet **lean** denotes a sense of characteristically implied effectiveness that is an attitude and behavior adjustment. **Lean** is about processes, people, and how they work together to accomplish operational excellence. It is in essence, a cultural change! For UT Dallas, **lean** is a necessary change if we are to maximize our potential of becoming a true Tier One university.

Why **lean** and why is UT Dallas focusing on this initiative? We all recognize that going forward there is a finite amount of resources available to support operational costs that continue to increase at a rate far exceeding the annual cost of living adjustments. We also understand that there are many antiquated processes that impede our ability to realize the true potential of UT Dallas. Finally, we have an opportunity to live up to our vision of *Creating the Future* — of how to develop, grow, and operate an efficient and effective Tier One university. To accomplish this, we must first make sure that the infrastructure has the capacity, process improvements, and system modernization needed to absorb the growth.

Lean is not only an issue for Business Affairs; it is a university-wide issue. Over the next several months, we will begin a process to incorporate **lean** principles and processes in every aspect of University operations. This issue of the *Business Affairs Bulletin* includes details on process improvements for student bill payments and financial aid, introduces a new emergency evacuation plan, promotes community wellness, highlights outstanding employee accomplishments and provides information on **Lean University** training. The exciting journey continues!

Dr. Calvin D. Jamison
Vice President for Business Affairs



It's A Fact



UT Dallas Community News

COMMUNITY WELLNESS

Live Healthy Dallas 100 Day Challenge



UTD Participants in Live Healthy Dallas 100 Day Challenge.

On January 16, UT Dallas began participating in a team-based health and fitness program called the Live Healthy Dallas 100 Day Challenge. It is a pilot program initiated by the Greater Dallas Chamber and the non-profit organization Live Healthy America. The number of teams who joined the challenge grew to 16 with a total of 112 participants, who have so far lost over 300 pounds and walked over 11,000 miles.

Several members of UT Dallas' Live Healthy Dallas teams met at lunchtime on March 5 to celebrate the halfway mark of the 100 Day Challenge by taking a stroll around campus. It was a beautiful day for sharing ideas and strategies on how to start and stay healthy.

Human Resources Management, in conjunction with the UT Dallas Staff Council Wellness Committee, emailed employees a weekly series of "Heart Bytes" or short vignettes designed to increase everyone's awareness of National Wear Red Day and Heart Disease. On February 1, the Office of Human Resources Management encouraged employees to wear red and provided "Love Your Heart" stickers for those who stopped by the office.

In May, UT System will launch "America on the Move - UT System Ultimate Challenge", a health-related competition between the UT System institutions. The campuses with the greatest participation (based on % of total headcount) and improvement (based on % of improvement) will win the "America on the Move - UT System Ultimate Challenge Traveling Trophy." More information will be available soon.

LEAN UNIVERSITY TRAINING COMING TO UT DALLAS

Dr. Jamison is heading up an initiative to implement the Lean University concept at UT Dallas. What is a Lean University? A Lean University utilizes the Lean methodology which guides an organization through a process to eliminate non-value-added activity and sets the stage for dramatic quality improvements and customer satisfaction.

Training, sponsored by Dr. Jamison, for 15 persons from departments throughout the University will take place over the summer. These individuals will become certified in the Lean University methodology and will lead their departments in rolling out the Lean initiative. Stand by for more information regarding the transformation of our campus to a "Lean University."

*Light snow blankets the ground
of the UT Dallas Campus
on March 3*



UT Dallas Community News (continued)



Ivy La Seng at AFC Sushi - Nutrition Guides at left



*Nutrition Guides available at Chick-fil-A
(Edilberto Luciano pictured)*

COMMUNITY WELLNESS

Food Service Promotes Healthy Eating

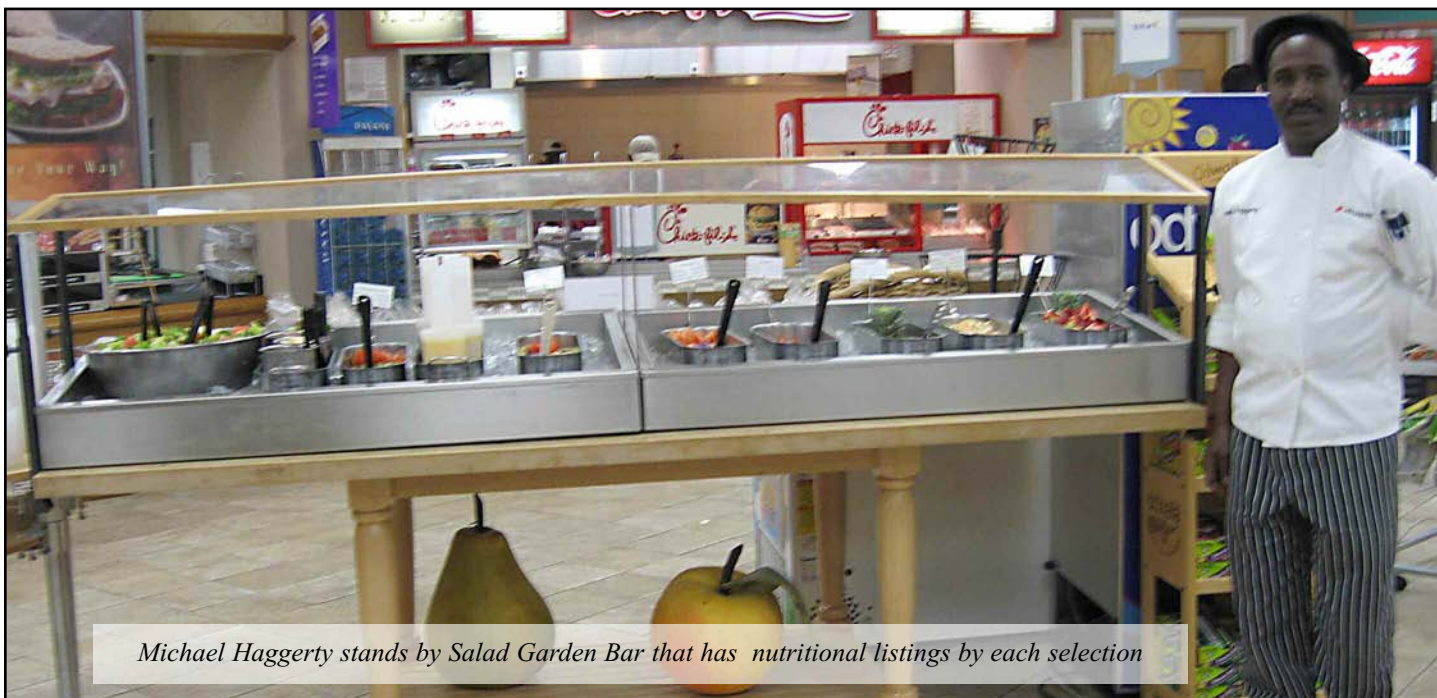
Recently Aramark initiated a program to promote healthy eating and nutrition awareness at the campus food service facilities. As part of the initiative, nutrition data is included at each food station in the Student Union Comet Café. Coming soon, nutritional information will be included with the menus on the food service website at:

www.campusdish.com/en-US/CSSW/UnivTexasDallas

The website will also host a link to “Fresh & Healthy Flavor” which offers tips on good nutrition and healthy eating.



Pizza Hut has “Keep It Balanced” Guides



Michael Haggerty stands by Salad Garden Bar that has nutritional listings by each selection

PROCEDURE UPDATES

UPCOMING IMPROVEMENTS TO THE STUDENT BILL PAYMENT AND FINANCIAL AID DISBURSEMENT PROCESSES

A team of Business Affairs and Information Resources employees is working on improving the system that UT Dallas students use to pay their tuition bills and receive financial aid payments. The new system, which will be fully functional for the summer 2008 semester, will also improve internal controls for safeguarding students' banking and credit card information. This new upgrade will also serve as the "front end" for the upcoming PeopleSoft system, so the effort invested in this implementation will have long lasting effects. Following are some of the main benefits of this initiative:

Secured Electronic Refunds

Students will be able to enter their banking information on a secured website and receive their financial aid and tuition refund payments through direct deposits. This feature will enable students to get their money into their bank accounts faster and their banking information will be secured. Students wishing to receive refunds through direct deposits will no longer have to visit the Financial Aid Office to provide banking information in a hard copy format.



Fog Creeps onto UT Dallas March 11

Online Installment Payment Contracts

Students will be able to choose an installment payment method on the web portal. Currently students have to visit the Bursar's Office to complete an installment contract in hard copy. The new software will enable students to file the installment contract electronically. By electronically completing an installment contract, students may avoid long lines and eliminate additional phone calls or emails.

Smaller First Installment Payment

During the last legislative session, the requirement for 50% minimum down payment on installment contracts was eliminated and universities were allowed to establish their own policies within certain guidelines. To make tuition payments more affordable, effective with the summer 2008 semester, UT Dallas will switch to a three-equal-payments installment method.

Predefined Automatic Tuition Installment Payments

Students will be able to predefine the frequency of their tuition bill payment and the payments will be made automatically in accordance with the latest information entered by the student on the web portal.

Third Party Tuition Payments

Students will be able to authorize third parties (parents, employers) to have access to their tuition bill (not their grades, etc.) and pay the bill electronically on their behalf.

Electronic Access to Semester Invoices

Semester invoices will be uploaded to the students' portals and will be continuously updated as students change their course load. Mailing of hard copy invoices to the students will be gradually discontinued as students will be able to print them or email them as needed.

Email Notifications

Students will receive email notifications about activities posted to their accounts, i.e. refunds processed, new bills uploaded, etc. The email notifications are table driven and can be defined by the Bursar's Office for all types of student-related correspondence.

User Friendly Screens

The new screens will be more intuitive, better looking and more user friendly. When students log into their web portal, there will be a personalized greeting "Welcome (Name of Student)."

Single Sign On

Students will be able to perform all of their web payment activities with a single ID and password. Currently, students must use two ID's (their Net ID and their Student ID) if they wish to pay with a web check. The new system will require only the Student ID and password.

Procedure Updates (continued)

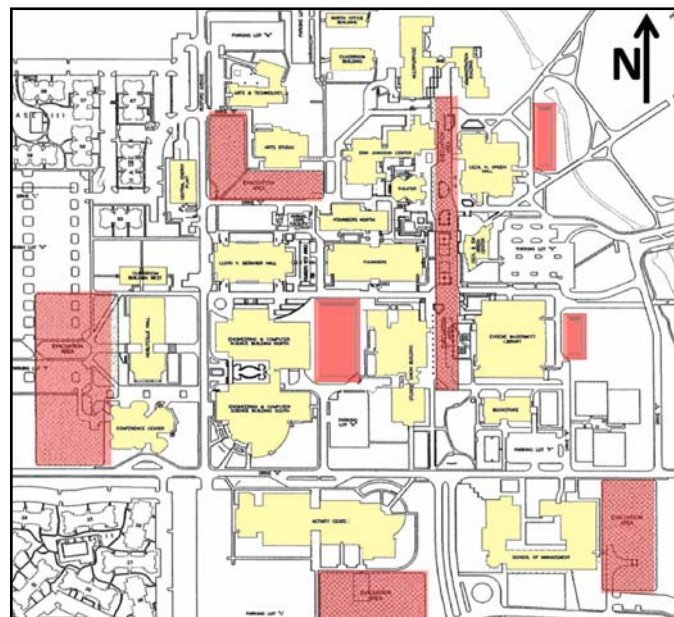
BUILDING EVACUATION AT UT DALLAS

Emergency preparedness, mitigation and the safety of our students, faculty, staff and visitors are of the highest priority at UT Dallas and part of the mission of the Office of Emergency Management (OEM). Most recently OEM is working on evacuation and sheltering-in-place procedures. The first step was to locate and install "Evacuation Area Assembly" signs.

In February, through coordination with our Facilities Management Department, sixteen Evacuation Assembly Area signs were posted at locations throughout the UT Dallas campus as requested by the Office of Emergency Management. Since then, OEM has received numerous calls and emails concerning the signs from those who are curious about why the signs are in specific areas and what to do now that they are here.

Multiple departments, agencies and committees were contacted before choosing the specific locations. Interaction with the Richardson Fire Department helped to ensure that signs were placed as far out of the path of emergency vehicles/equipment as possible. Environmental Health and Safety (EH&S), the Safety and Security Council and Staff Council were informed during the process of suggested locations, specifications and cost of signs, proposed timeline for completion and building evacuation development. The EH&S Department generously offered to pay for the signs and will assist with building evacuation drills and training.

The purpose of the evacuation assembly area signs is to allow for a more coordinated response effort when an evacuation of a building(s) is required. An evacuation may be necessary due to fire/smoke, a chemical incident, structural failure, drill or other incident that emergency personnel recognize as a threat to life and/or safety. The importance of evacuating when you hear an alarm and knowing whether or not everyone gets out of the building safely is crucial.



*Buildings are light yellow and evacuation areas are red.
A full map can be found at www.utdallas.edu/police/oem.html.*

What is the next step?

Each department/school will need to create their emergency evacuation plan and identify building occupants, assist with the evacuation and/or shelter-in-place procedures and be aware of those who may need assistance during this course of action. A building emergency evacuation template can be found at www.utdallas.edu/police/oem.html.

Each Evacuation Assembly Area site has been given a specific location number which is noted at the bottom of each sign. A primary and secondary location should be identified in the plan. Knowing where fire extinguishers are located, how to use them and where the exits and severe weather shelters are located will be included in the plan. The goal is to be as aware, prepared and trained for as many emergency situations as possible and to keep those on campus safe and informed. Awareness is power but Action is empowering.

To reach these goals requires working together as a team. There is an immediate need for volunteers to be S.A.F.E. (Safety and Fire Evacuation) Leaders and Floor Monitors in each building. Through annual training and drills, these volunteers will know their building plan(s) and be able to help educate the building occupants. More information will be available in the near future concerning responsibilities of these positions. Please forward an email if you are interested in volunteering.

Thank you for being interested in the changes that are happening to make your campus more prepared for all emergency situations. For more information, contact Dorothy Miller at the Office of Emergency Management, extension 2420, or by email at dorothy@utdallas.edu.



Construction Updates



Renovation of bathroom in Green Hall.



Planning:

- Proposals were received for the planning and design of a replacement Hazardous Waste Handling and Storage Facility.

Design:

- Schematic designs were completed for the proposed Loop Road and AD Parking Lot as well as the Drive "C" Replacement.
- Founders Annex renovation is underway. The project design is being finalized.
- The design of the new Facilities Management building is nearing completion.
- A Notice-to-Proceed was issued for the GEMS Success Center that will be located in the University Conference Center. Completion date is August 1, 2008.

Construction:

- The Berkner Hall roof repairs are nearing completion.
- Improvements to the exterior of the Center for Brain Health are continuing with a target date of June 2008.
- The Central Energy Plant is having new exterior panels installed. The "mock-up" is complete and the "go-ahead" has been given to install three more panels.
- The Facilities Shops building will be completed late April 2008.
- The Jonnson Hall and Green Hall air handling units have received a needed "check-up." In addition, the air-handling units at the McDermott Library are being refurbished.
- The Texas Public Schools Renovation and Relocation Project is underway and should be completed by the end of April 2008.
- The McDermott Library 4th Floor renovation is scheduled to start in May 2008.
- ATMOS Energy has commenced the relocation of the University's main gas pipeline to make room for the upcoming construction of the new Student Living/Learning Center.
- The renovation of Berkner Room 2.520 for conversion to the SIPID/Biotech lab is in progress and is scheduled for completion during April 2008.
- A Notice-to-Proceed was issued for the installation of a new cold room environmental chamber in Founders Building, Room 3.202.
- The PUB canopy project was completed in time for the end of Spring Break (pictured on page 7).



The new patio area outside of the PUB.



*Much fun was had after the March 3 snow.
Snowmen were popping up all over campus.
(above - Police Building, below- ECS complex)*



Important Reminders

University Health Plan Updates

Good News about Fiscal Year 2009 Health Plans

At this time, the UT System plans no changes in health plan premiums, premium sharing, or health plan design for the year starting September 1, 2008.

Annual Enrollment is Coming. Are You Making an Insurance Change that Will Require an EOI?

Some insurance changes require that you provide proof of good health or Evidence of Insurability (EOI). The EOI process begins July 1 and continues through July 31. As you review your insurance needs, consider the requirements below.

What is EOI?

Evidence of Insurability (EOI) is the medical documentation required by a carrier to determine if the participant's health condition meets the carrier's criteria to be approved for enrollment, or for increasing the amount of coverage or adding dependents for coverage. Approval by the carrier is NOT guaranteed.

When is EOI required?

EOI is required when you (employee or retiree):

1. Enroll in or add dependents to UT Select. EOI is not required when you and/or your dependent enroll in UT Select during Annual Enrollment AND are currently enrolled in another group health plan.
2. Enroll in or increase your Voluntary Term-Life coverage.
3. Elect dependent group life coverage.
4. Enroll in short-term or long-term disability income coverage (not available to retirees).
5. Elect Long Term Care coverage.

Have You Used Your Floating Holiday?

This fiscal year (FY 2008), one floating holiday is included in the UT Dallas holiday schedule. That's 8 hours for eligible full-time employees which can be taken at any time during the fiscal year with the prior approval of your supervisor. We encourage you to use this holiday before the end of the fiscal year on August 31, 2008. Why? It will be good for you to relax and get away.

Researchers from the State University of New York at Oswego conducted a survey of more than 12,000 men ages 35 to 57 who had participated in a large heart disease prevention trial. The results, presented in March, 2000, at a meeting of the American Psychosomatic Society in Savannah, suggest that men who take vacations every year reduce their overall risk of death by about 20 percent, and their risk of death from heart disease by as much as 30 percent.

To their surprise, the researchers discovered that some of the men surveyed didn't take any vacation time over the five years surveyed. But instead of being rewarded for their dedication to the job, they suffered the highest overall death rate and highest incidence of heart disease of any of the participants.

"We concluded that skipping vacations could actually be dangerous to your health," said Brooks Gump, Ph.D., an assistant professor of psychology at Oswego and one of the study's co-authors. "Vacations have a protective effect because they help you reduce your load of stress, or at least allow you to take a break from the everyday stressors of the workplace."

So do something good for yourself and schedule a day off. Be sure to tell your supervisor and your department Administrative Assistant that you would like to take your floating holiday, so they can keep accurate leave records. For more information about holidays, read the Holiday Policy on line, or contact Human Resources Management.

FY 2009 Employee Holiday Schedule

Holiday	Date	Day of Week
Labor Day	September 1, 2008	Monday
Thanksgiving Day	November 27, 2008	Thursday
Day after Thanksgiving	November 28, 2008	Friday
Winter Holiday	December 22, 2008	Monday
Winter Holiday	December 23, 2008	Tuesday
Christmas Eve	December 24, 2008	Wednesday
Christmas Day	December 25, 2008	Thursday
Day After Christmas	December 26, 2008	Friday

Holiday	Date	Day of Week
Winter Holiday	December 29, 2008	Monday
Winter Holiday	December 30, 2008	Tuesday
Winter Holiday	December 31, 2008	Wednesday
New Year's Day	January 1, 2009	Thursday
Winter Holiday	January 2, 2009	Friday
Martin Luther King, Jr. Day	January 19, 2009	Monday
Memorial Day	May 25, 2009	Monday



AUDIT AND COMPLIANCE

corner

AUDIT TIP: Do you know what the number one audit recommendation for 2007 was?

Account Reconciliations! Here's how you can make sure this one does not end up on your next audit report!

Reconcile your departmental accounts in a timely manner.

WHY? Because the opportunity for errors or fraud occurring and not being detected is increased when accounts are not reconciled, especially in a timely manner! UT Dallas guidelines require reconciling your departmental accounts in a timely manner, generally within two months after receiving your reports. **Attention Reconcilers and Reviewers:** Don't forget to sign and date the reconciliation and make sure you attach and review the back-up documentation. If the person who normally reconciles or reviews is out for an extended

period or the position is vacant, the reconciliation and review still needs to be performed! If you need help with account reconciliations, please contact the Office of Finance at extension 2682 or Internal Audit at 2693.

COMPLIANCE REMINDER: We appreciate your patience as we transition Compliance Training to WebCT. Annual Compliance Training for all benefits-eligible staff and faculty members is due April 30! Additional information on Compliance Training can be obtained at

www.utdallas.edu/audit-compliance/training.htm

Please feel free to contact the Compliance Office at 2233 or by email at compliance@utdallas.edu if you have any questions or concerns.

Outstanding Employee of the Quarter

BILLY TALKINGTON

Billy Talkington in the Police Department is the winner of the Dr. Larry D. Terry Award for Outstanding Business Affairs Employee for the second quarter of FY2008.

His nominators wrote that Billy serves the University in many ways through his role in the Police Department. He is always very efficient in responding to requests for records and deals with issues from requestors in a very professional manner. On one particular occasion, he demonstrated his sensitivity when dealing with a requestor who had a very difficult family situation. Billy stopped what he was doing and took extra time to talk with the family member. Billy's receptive, responsive attitude toward the individual helped him better understand the situation and more importantly, let him know that the University, through Billy, cared. This example illustrates how Billy works to provide excellent customer service to the community.



Billy Talkington Receives Award from Dr. Jamison.

The Dr. Larry D. Terry Award for Outstanding Business Affairs Employee was established to recognize outstanding performance and special achievements of Business Affairs employees.

Departmental Updates

Business Affairs Welcomes New Employees

Please welcome these new employees to UT Dallas.

Facilities Management: Jeffery McQueen and David Roberts

Finance: Steven Martyn

Human Resources Management: Karen Gawley

Police: Mark Brushwiller, Devin King and Ray Mitchel

Departmental Moves in Business Affairs

Christine Moldenhauer recently moved to the employee benefits team. Her new responsibilities include benefits counseling for employees and retirees with last names L-Z and she will also work on the President's service awards program. Her new extension is 2127.

Kelly Zimmerman is now working with the employment team. Her responsibilities include non-immigrant employment issues, classified and A&P staff employment. You can contact Kelly at extension 2129.

R. Jay Carter accepted the Buyer II position, replacing Mark Sachnik. Contact Jay at extension 2302.

T. Kacey McFarland has accepted the position of Mail Services Supervisor, replacing Jay.

Time For Spring Cleaning

In late May, Business Services is planning a "mass destruction" of records that have reached their destruction date per the UT Dallas record retention schedule. More information will be coming. If you have specific questions, please contact Teresa Johnston or Tysh Coleman at extension 6771 or email tysh.coleman@utdallas.edu.

Annual Inventory

The annual inventory for the University began in April. There are 100 departments with over 15,000 items that must be verified during this process. For information, please contact David Routzahn at extension 6421.

Employee Highlights

David Maldonado recently spoke to over 190 international students about the U.S. tax treatment of their financial aid and/or university employment. The conference was sponsored by the UT Dallas Office of International Student Services. "Every UT Dallas international student in the United States on an F or J visa must file a tax return with the IRS," according to Maldonado, "and the process can be confusing. We are always happy to help explain the process as part of our service to the student community."



In November, **Doug Shedd** (left) and **Ana Johnson** (right) attended the 49th annual National Council of University Research Administrators (NCURA) conference held in Washington, D.C. Founded in 1959, NCURA membership boasts of experts and leaders in research administration from prominent universities. The annual conference provides an opportunity to discuss and exchange information and experiences related to sponsored projects. Topics of discussion at the conference included current issues in effort reporting, cost sharing, service centers, managing receivables, OMB audit process, updates regarding NSF programs and a Washington D.C. update.

Merrie Tabbert recently completed the first section of the Toastmasters International Communication program. This



program helps participants improve their speaking leadership skills. A member since June 2006, Merrie participates in two clubs, including the University Toastmasters of Dallas, which meets on Wednesdays at noon in the Student Union. After work Merrie enjoys the Wylie Wisecrackers, her home club where she serves as Secretary.

Departmental Updates (continued)

Employee Highlights (continued)

There were wedding bells for **Mark Routson** and **Karla Beckner** on March 29, 2008. Mark and Karla met when they joined the UT Dallas Police Explorer post their freshman year. They were very active in the Explorer Post and were successful in statewide competitions. Karla led the UT Dallas Police Explorers to a National Championship in July 2006. They are both alumnus of UT Dallas, graduating in December 2006; Mark with a B.A. in Government and Politics while Karla holds a B.S. in Biology and Criminal Justice. Mark and Karla attended the UT System Police Academy in January 2007 and graduated in June 2007 ranked #1 and #2 respectively. Congratulations to the newlyweds!



Jody Nelsen, M.B.A. '97, was honored on March 29 at the fifth annual Alumni Awards Dinner. Jody received the Green and Orange Award, which recognizes UT Dallas alumni who have provided exceptional service to the University.



*President David E Daniel, Jody Nelsen, Bill Sproull
and Laura Beall*



*seated - Pete Bond, Marty Baylor, Peggy Zotter, Teresa
Johnston, Lisa Sunderland - standing - Zeke Barrera, Wanda
Mizutowicz, Lynn Butler and Jody Nelsen.*

Business Affairs Spotlight Department

Transportation Services Division

The spotlight department for the second quarter is Transportation Services, a division of the University Police. Nancy Branch (pictured) serves as Transportation Manager of the department.

As its name implies, this department provides the campus community with public transportation and parking services. The department coordinates the bus shuttle service and will work with campus groups who need to secure transportation for university events. To learn more about the services provided by Transportation Services, go to www.utdallas.edu/transportation or email them at transit@utdallas.edu.



IT'S A FACT...

68.5

Total years of experience in the UT Dallas Budget Office

83

Number of buildings at UT Dallas

6,449

Number of rooms in the buildings

