OFFICE OF BUSINESS SERVICES

UNIVERSITY OF ILLINOIS SYSTEM

Altogether Extraordinary™

ANNUAL REPORT
2020/21

OFFICE OF BUSINESS SERVICES

Office of Business Services
Office of the Chief Financial Officer and Comptroller

VALUES THAT DRIVE US:

- CUSTOMER SERVICE
- TRANSPARENCY
- INVESTING IN PEOPLE

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TRANSITION AND THANKS

FY21 was a year of big change for the Office of Business Services, for the University of Illinois System, and for all of us as individuals. The COVID-19 pandemic presented an opportunity for Business Services to reevaluate how we operate and led us to think creatively about how best to continue providing top-notch service in this new, largely remote environment. We are excited to share some of those innovations later in this Report.

Another major change was the merger of the Contract Services Offices with the Purchasing Offices across the System effective July 1, 2021. This involved, but was by no means limited to, staff and system transition plans, training our colleagues in the Purchasing Offices, customer support, document updating, template transitions, and much more. At all times during the transition work, staff and customer support were at the forefront of everyone's minds at CSO and Business Services. We would like to take this moment to publicly thank the Contract Services Offices across the System and their staff for their extraordinary years of service, the valuable support they provided to their customers and their colleagues, and their patience and good humor throughout the transition process. Our loss is the Purchasing Offices' tremendous gain!

Finally, the Office of Business Solutions and Support was reorganized into two new entities: Operations Support and the Office of Organizational Effectiveness. Operations Support is charged with providing quality business solutions through offering services to allow System units to focus on their core objectives. The Office of Organizational Effectiveness is charged with creating opportunities for university and System staff to grow, adapt to change, and reach excellence in supporting the System's mission; work that has never been more important as we all navigate the "new normal" post-COVID.

VISION

Business Services partners and provides expertise to link the university community with solutions and resources to advance their mission.

Customer Relationships:
Business Services focuses on the individual needs of our customers, providing a partnership that maximizes collaborative solutions.

Innovative Solutions:
Business Services supports our customers by seeking to understand their business and helping them achieve their goals through innovative solutions.

Resource Connections:
Business Services, because of our breadth of experience and strong relationships with system partners, navigates the area between the generation of ideas and need for support in university units and the available resources across the entire system, making connections that produce solutions.
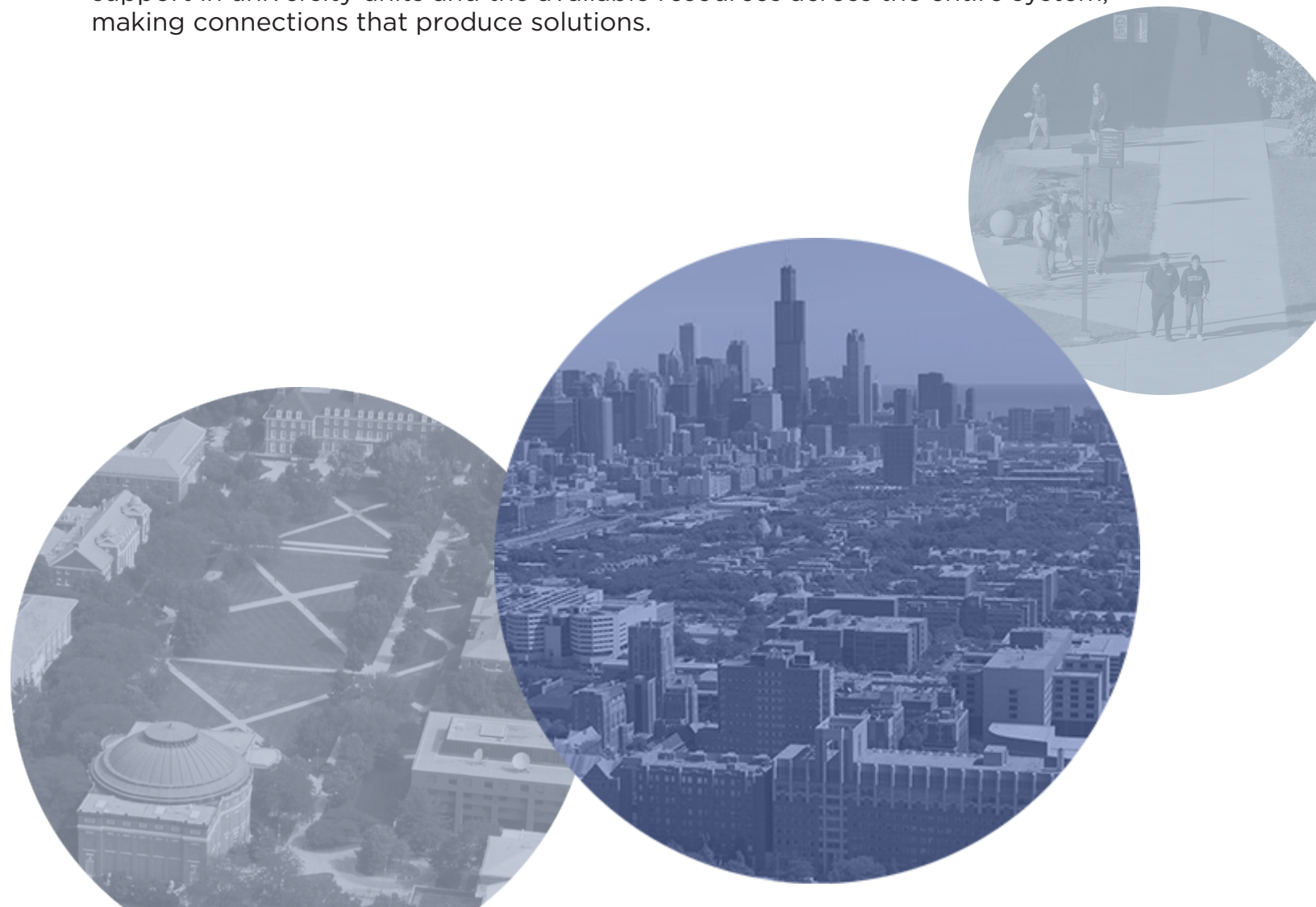
OUR SERVICES

Student Services

Directly serving more than 83,000 students, assistance is always available to navigate the billing and financial services processes. Promoting strong fiscal health, timely service, and partnerships with other university units to ensure student success.

Research Costing

Performing rate study proposals to calculate and negotiate facilities & administrative, fringe benefit, and tuition remission rates with the federal government. Provides guidance and oversight over numerous service activity rate calculations and compilation of the Federal DS-2s and Higher Education Research and Development survey.

Contract Services

Partnering with university and System Office units to draft and negotiate contracts that support the mission and vision of each university, including agreements that have direct impact on students. Also serves as the official contract repository on behalf of the Board of Trustees.

Shared Services

Providing business operations and instructional design services to the System offices, thereby allowing System offices to direct resources to more focused business and financial functions.

Certification Programs

Delivering a business and finance certification program that fits the needs of the university units and connects participants to the organizations and resources that support them in their role.

Business & Compliance Advising

Providing support and outreach to the university units, helping units operationalize their initiatives, providing problem resolution advice for operational issues, aiding in navigating complicated business and finance matters. These issues or initiatives usually transcend more than one operational area.

Additional Services

Business Services provides many other services as well, such as:

Business Analysis
Communications
External Audit Management
Organizational Development
Policies & Procedures
Website Updates

INNOVATIVE ACCOMPLISHMENTS

The departments with the Office of Business Services have improved and streamlined processes to allow for more effective, efficient, and timely work for our departmental, student, and external customers. Some examples of these innovations include:

Contract Services Office

CSO partnered with the SHIELD Illinois team to create a fast and effective method for processing SHIELD Illinois agreements to allow the University System to share its COVID-19 resources across the State of Illinois. This work resulted in 101 contracts signed with a revenue of over $25,000,000 to the University System through the SHIELD Illinois program but, more importantly, helped the citizens of Illinois gain access to University-created COVID testing ensuring accurate and timely tests during an unprecedented pandemic. In addition to its work with SHIELD Illinois, CSO also processed several other COVID contracts that provided the dual benefit of both allowing the University to leverage its knowledge and resources to help combat the COVID crisis and, in combination with the revenue generated from SHIELD Illinois' work, earning over $250 million in total COVID-related revenue for the System.

One major innovation at CSO in FY21 was streamlining the contract template review process across the System. CSO worked with units System-wide to merge redundant templates into one template that can be utilized by multiple offices, saving review time, increasing consistency among departments across the University System, and allowing for fewer requests for changes to the templates, all of which result in quicker contract processing within CSO and allowing departments to get to work much more quickly. Further, as templates expire, having one template to review rather than several will greatly expedite updating process. Of the four types of contracts signed—University-drafted template with no changes, University-drafted template with negotiated changes, other party's template, or needing to draft a new agreement—more than half (58%) of the contracts signed by CSO used a University-drafted template with no changes. In fact, 67% of the contracts signed by CSO in FY21 used a University-drafted template, with and without negotiated changes, rather than using the other party's contract or needing to create a custom contract.

To show how much the work performed over FY21 was valued by our customers, the staff at UIC CSO was nominated for a DELTA award by one of their departments.

INNOVATIVE ACCOMPLISHMENTS, continued

Government Costing

FY21 saw the go-live of Government Costing's Service Activity Advanced Certificate training program, a result of two years of work. This new training program will empower service centers across the University System to meet University and Federal regulations, which require compliant service rates to be calculated and implemented once every two years. This means that Government Costing's 600+ service centers can accurately calculate rates, further mitigating potential audit findings, lessening disallowance of costs on sponsored projects, and helping avoid return of funds to sponsors, all of which saves the University time and money. This training created rapport between Government Costing staff and its customers by making the training fun, engaging, and entertaining to attendees, incorporating music and jokes into the sessions, which lead to more attendee interest and participation. One customer even stated that "The presenters are amazing! I loved how interactive and challenging it was. The training team was so helpful and made this easy to understand." In fact, this training was so successful that the training team won the Team Delta Award!

INNOVATIVE ACCOMPLISHMENTS, continued

Office of Organizational Effectivess

The Office of Organizational Effectiveness (OOE) partnered with System Human Resources and the Office of the Vice Chancellor for Research in Urbana-Champaign to create and launch the COVID-19 Safety Course for UIC, UIS, UIUC, and System Offices, which course has been taken by over 20,000 people. OOE also partnered with SHIELD Illinois to create training and communications to support the rollout of SHIELD Illinois' COVID testing program state-wide.

FY21 marked the third successful year of the Certified Business Administrator program, which this year trained 116 Business Administrators, the largest cohort yet. Part of this included transitioning a fully in-person training program to a fully online training. OOE worked with units to create additional tracks, providing additional and/or updated information on Cash Handling and Advanced Service Activity.

OOE also provided project management and communications support to the Vice Provost for Academic Affairs' online Student Mental Health Summit to 550 students as well as created an online, instructor-led course and orientation webpage for new business and finance employees to help them navigate their business and finance responsibilities.

Operations Support Shared Services

FY21 saw a 560% increase in Operations Support Shared Services (OSSS) support for units, going from supporting 5 units to 33 units, with an additional 3 more units to be added in FY22. This increase in work necessitated OSSS to develop a human capital strategy to align with OSSS' new strategic plan to optimize current processes and staff using the resources it has rather than requesting additional support, which in turn saves the System money. OSSS also brought its innovative skills to the System's COVID-19 response by reconfiguring its organization to allow OSSS to throw more support to SHIELD Illinois aiding it to provide services state-wide; facilitated and executed purchasing and inventory plans to enable its customers working from home to continue to provide services to their customers from home with nary a blip in service quality and speed; and finally OSSS partnered with UAFR to track COVID-19-related spending to assist university leadership's planning needs.

INNOVATIVE ACCOMPLISHMENTS, continued

University Bursar

FY21 saw the University Bursar create several new avenues to allow its customers to get immediate help when needed by creating a new Refund Status Page in Banner self-service to allow students to obtain real-time status on their refunds without needing to call the Bursar's Office. This led to more immediate information to students while also decreasing Bursar staff time spent answering these questions, freeing them up to spend on other responsibilities and creating an even more efficient process. Additionally, the Bursar's Office deployed a customer queuing systems to assist with and manage customer scheduling. The UIC Customer Service team moved to the iAdvise system to more effectively manage in-person students questions, which will greatly streamline its service once in-person questions resume post-COVID. This system is free, so there is no additional financial cost to provide better service. At UIUC and UIS, the Customer Service team will use a web-based, mobile-friendly app to provide in-person customer service. This is also a free app that will similarly streamline service with no financial impact to the Bursar's bottom line.

The University Bursar continued to put more power in customer hands, freeing up Bursar staff time to spend on other initiatives. Such initiatives included: creating a new Cash Handling Certificate Track in the Business Administrator Program, certifying 209 employees to be able to provide more effective and compliant cash handling processes in-house; creating a Delegated Agent program to allow campus partners to remove late fees, delegating 17 individuals with this certification, resulting in not only freed Bursar staff time, but in faster resolution to student requests and a more streamlined process between departments and the University Bursar; allowing departments to directly apply GAR payments to specific departmental GAR invoices; and finally, creating a Returned Checks Delegated Agent Program to establish an agreement for a department employee to handle returned checks within their units, with each agreement being reviewed by the University Bursar prior to official delegate designation.
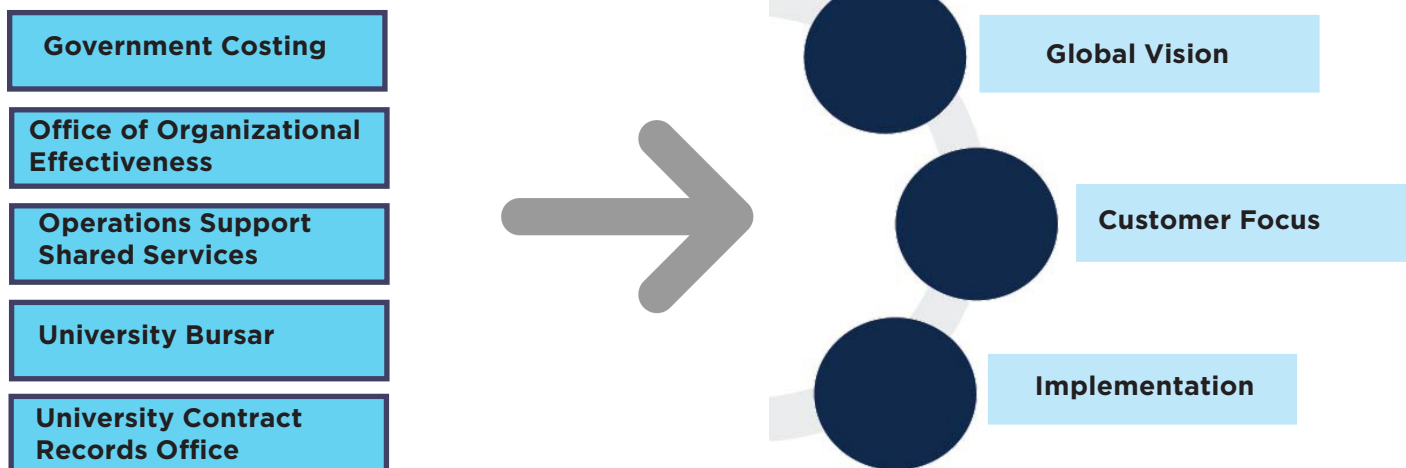
Additionally, the University Bursar deployed an Intelligent Process Automation solution for daily student refunds, freeing up roughly 2 hours/day of University Bursar staff time (or 10 hours/week, and 520 hours/year), streamlining communication and reducing back-and-forth emails.

University Contract Records Office

Thanks to efficient processes established and in place for the last several years, the 2.5 FTE and 2 student worker staff at UCRO was able to perform the following tasks for the entire University System in FY21: review 12,047 contracts for state of Illinois filing, manually enter 7,279 research contracts into the Illinois Contract System (iCS), file nearly 4,000 contracts with the Illinois Office of the Comptroller, and file nearly 350 contracts with the Illinois Secretary of State. This consistent level of output and effectiveness ensured that OBS and departmental customers were able to quickly and efficiently access their contracts, allowing the entire University System to remain compliant with reporting, research, and other needs.

LOOKING AHEAD

| Government Costing |
| Office of Organizational Effectiveness |
| Operations Support Shared Services |
| University Bursar |
| University Contract Records Office |

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Global Vision

Customer Focus

Implementation

Government Costing

Government Costing currently has two proposals in process for FY22. One in UIC for facility and administrative (F&A) rates that will include the preparation of space surveys and equipment inventories to better track the data; and the other at UIUC that will require additional analyses related to usage of full-time employees and space survey methodologies, but that will ultimately increase service and data processing.

Office of Organizational Effectiveness

FY22 will be a busy year for OOE. Several projects are on the horizon, all of which boil down to increasing knowledge share to customers quickly and efficiently and creating additional training to share knowledge with customers. One of these projects is a redesign of the OBS Website, which will include a full inventory of the website (including all webpages and files) and completing a customer usability study. Phase 2 of the website redesign, scheduled for Fall/Winter 2021, will cover the development and implementation of the new site.

OOE will continue its effort to increase the accessibility of its training and online events to ensure equitable access and experience for all learners and customers. Training plans for FY22 include (1) Abused and Neglected Child Reporting Act (ANCRA) training, which will be a requirement for all University of Illinois employees on a triennial basis, this training is expected to be released in Fall 2021 and is being created in partnership with System Human Resources; (2) adding a certification track to the Certified Business Administrator program to certify staff on proper procedures for payroll time entry and instruct cohort members to successfully manage the time entry process with few/no mistakes; (3) creating an online training to prepare staff to conduct important fixed asset work, which will be part of the larger Internal Controls initiative happening at the university; (4) redesigning the BACP to support business and finance employees throughout their careers at the University; and (5) partnering with System Offices to develop more delegated agent opportunities.

OOE also plans to work with System Human Resources and other System Office units to support implementation of the new accessibility policy as well as partnering Operations Support and AITS to develop a standard business continuity planning program for System Offices.

LOOKING AHEAD, continued

Operations Support Shared Services

OSSS' move to Team Dynamix and away from the CA Service Desk for support tickets will continue to better provide customers real-time information on the status of their tickets, as well as allow all communication about tickets to be efficient and clear.

University Bursar

FY22 will premiere the Student Contact Center to assist with University Bursar inquiries. This will both provide work experience for university students as well as a peer-to-peer contact center for billing questions, which, in turn, promotes student success. This Center is in direct support of President Killeen's strategic pillars and the UIUC Student Success Initiative. Additionally, the University Bursar collections accounts will be migrated to a new online portal, which will provide 24/7 access to review collections status and signup for payment plans in a more user-friendly environment.

The University Bursar will also utilize Intelligent Process Automation to: (1) streamline the Detail Code Approval process, using the IPA process to streamline data collection, provide more timely feedback to departments, and reduce the amount of manual processing, which will all result in a quicker turnaround and increased departmental satisfaction; (2) create an online portal for GAR Account Creation to allow departments to submit new requests as well as update current accounts, which will allow departments to be able to track their request throughout the process and be automatically notified when the new account is ready for use; (3) develop a process to replace the current Sponsor Authorization process with a goal of improving, streamlining, and quickening the process; (4) automate a Distribution of Collection Expense process to both improve accuracy and ensure that any employee at any level of experience with the process can complete this process, which will greatly reduce the time necessary to complete the entire process; and (5) will automate the Stop Payment Form to quickly collect the required information and obtain electronic signatures from the students, which will improve the student experience and result in funds being reissued much more quickly.

University Contract Records Office

With the FY22 roll out of Contracts+, the University Contract Records Office (UCRO) will focus on establishing in-office policies and procedures to ensure UCRO is always available for customer questions, correcting errors made in Contracts+ as all contract processing and departmental customers get used to the new system, providing on-the-spot training and troubleshooting for customers, and finding strategies to best work out of two systems (iCS and Contracts+) as the new contract management system is rolled out System-wide. The goal being to ensure customers do not see a decline in speed or quality of service over this rollout and transition. In order to aid in this process, UCRO is in the process of hiring an additional full-time employee to ensure the office is staffed up and the new employee is trained prior to the deployment of Contracts+ to allow the office to continue to provide the exemplary service UCRO is known for System-wide.