



THE UNIVERSITY OF
TENNESSEE
HEALTH SCIENCE CENTER.

Campus Wide Business Manager Meeting March 28, 2023

*Please sign the sign-in sheet or put your full name in the Zoom Chat for
HR128 Credit*

Agenda

- Annual Compliance Training Reminder
 - Tony Ferrara
- Travel Policy Updates
 - Jonathan Lawshe
- DASH Updates
 - Mike Ebbs
- Proposed Budget Calendar
 - Mike Ebbs
- Strategic Plan Presentation
 - Sally Badoud

Annual Compliance Training Reminder

It's that time of year again, Mandatory Compliance Training has launched!

All regular staff, faculty, and temporary employees are required to complete the 2023 Mandatory Compliance Training and Outside Interest Disclosure form by April 30, 2023. The Compliance Training can be accessed through K@TE and consists of 7 training modules. The HIPAA Training can be accessed through Health Stream. The OID form can be accessed through IRIS under the Employee Self-Service tab.

If you have any questions, please contact the Institutional Compliance Office at 901.448.8469 or institutional.compliance@uthsc.edu

Travel Policy Updates: Proposed Revisions to Travel Policy



Fiscal Policy Advisory Committee

- We are aiming to launch the new policy/procedures in April to May 2023.
- UTSA AP will work with Huron, Concur, and World Travel to change Concur.
- Major overhaul, with changes to reduce exceptions and improve the travel process.

Overall goals for the proposed edits

- The Fiscal Policy Advisory Committee's overarching goals were to:
 - Reduce exceptions
 - Eliminate unnecessary steps
 - Improve employee satisfaction with the travel process

Lodging (non-conference)

- Current: capped at CONUS or OCONUS
- Future: capped at 150% of CONUS or OCONUS

Advances

- Current policy: does not limit when someone may apply for a cash advance.
- Future: defines when an employee may request a cash advance:
 - International travel; or
 - Traveling with a student or students;
 - Employee does not have a travel card.

Per diem

- Current policy: employees must deduct meals when provided by a third party, such as a conference.
- Future: The University will no longer require employees to deduct meals when provided by a conference, unless the University provided the meals (e.g. at a University conference).

Travel Requests

- Current policy: requires a travel request before any travel outside of TN.
- Future: The University will require travel requests only when the employee will be traveling internationally.
- In 2022, 8,126 of 9,353 requests were for domestic travel.

Exceptions

- Current policy: all exceptions (excluding exceptions only for lodging) go to the CBO and then the CFO (or designee).
- Future:
 - There will be significantly fewer exceptions.
 - Those that remain: CBO will be last stop for vast majority of exceptions.

Contractors

- Current policy: Provides that contractors must comply with UT travel policy.
- Future: Allows departments to work with applicable contract/procurement office to negotiate a flat rate to cover contractor travel.

Refueling cars

- Current policy: The University prohibits refueling charges. Rental car companies utilize very sophisticated gauges that result in many employees receiving charges for under \$5.00 for refueling, leading to travel exceptions.
- Future: The University will allow refueling (but not prepaid) fuel charges without an exception.
- In 2022, 281 exceptions, totaling \$10,458.26.

Travel policy structure

- Current policy: 38 pages, sub-optimal organization, and sub-optimal wording.
- Future: policy itself is 2.5 pages; procedures total 26 pages, but will be alphabetized by header, worded much more clearly, and will be easier to understand.

DASH Updates

accenture

UT THE UNIVERSITY OF
TENNESSEE
SYSTEM

DASH | Adopt & Adapt
Prototype 1 Kick-Off

March 2023

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UT THE UNIVERSITY OF
TENNESSEE
SYSTEM

DASH Updates

Project Guiding Principles



Governance, Transparency & Inclusion

The ERP Program will be led by the UT System Administration Executive Sponsor and Executive Steering Committee who will work closely with all stakeholders throughout the University and the Program team. The ERP Program is committed to broad system-wide collaboration and transparent decision-making. The Program team will communicate frequently and fully to ensure accurate information and data are shared with the wider UT community and will seek input and feedback throughout.



Simplification & Standardization

The ERP Program will simplify operations and processes while ensuring the processes meet user needs. Processes will be redesigned based on higher education best practices and ERP functionality. Standardization of processes and data definitions across the UT System will maximize the opportunity for collaboration, facilitating the One UT culture.



Measurable Improvements

Improvements to transformed business processes will be measured by qualitative or quantitative standards as appropriate—for example, by the number of approvals eliminated or by stakeholders' judgement that reports contain more useful data.



Integrating Technology

UT System will adopt a culture of continuous improvement through technology. Rather than configuring software to current operations, the way we work will change as we adopt new functionality. Increased operational efficiency will be achieved while maintaining compliance with State laws and UT policies. The University will first use the ERP platform functionality to its fullest extent before considering additional software packages or alternative business processes.

DASH Updates

Project Goals & Objectives

Modern ERP: Bring core processes together under a **single platform** in order to deploy a modern ERP solution that **effectively processes the volume and type of transactions required**.

Fresh Approach: Adopt a **fresh approach to administration and operation** using a facilitated approach to realize the outcomes.

Efficiency & Effectiveness: Streamline and automate processes, creating a **leaner, more accurate and efficient operation**.

Intuitive: Implement user-friendly intuitive systems to **improve end user experience** and confidence across UT.

System-Wide Alignment: Deploy a shared system-wide methodology and financial structure to align reporting/analytics and **simplify consolidation and collaboration**.

Information & Reporting: **Provide better reporting** and decision making as well as give **real time visibility into crucial business processes**.

Technology Integration: Provide **smooth and seamless integration** between the new ERP solution and other systems used by the campus community.

Continuous Improvement: Take advantage of continuing advancements in functionality and technology that would enable future **improvements in business and administrative practices**.

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Implementation Scope | Applications

The following Oracle applications and modules will be implemented

Oracle ERP Cloud (Financials)

- Financial Accounting Hub
- General Ledger
- Contract Management
- Procurement
- Accounts Payable
- Asset Management
- Accounts Receivable
- Cash Management
- Grants
- Projects
- Travel & Expense

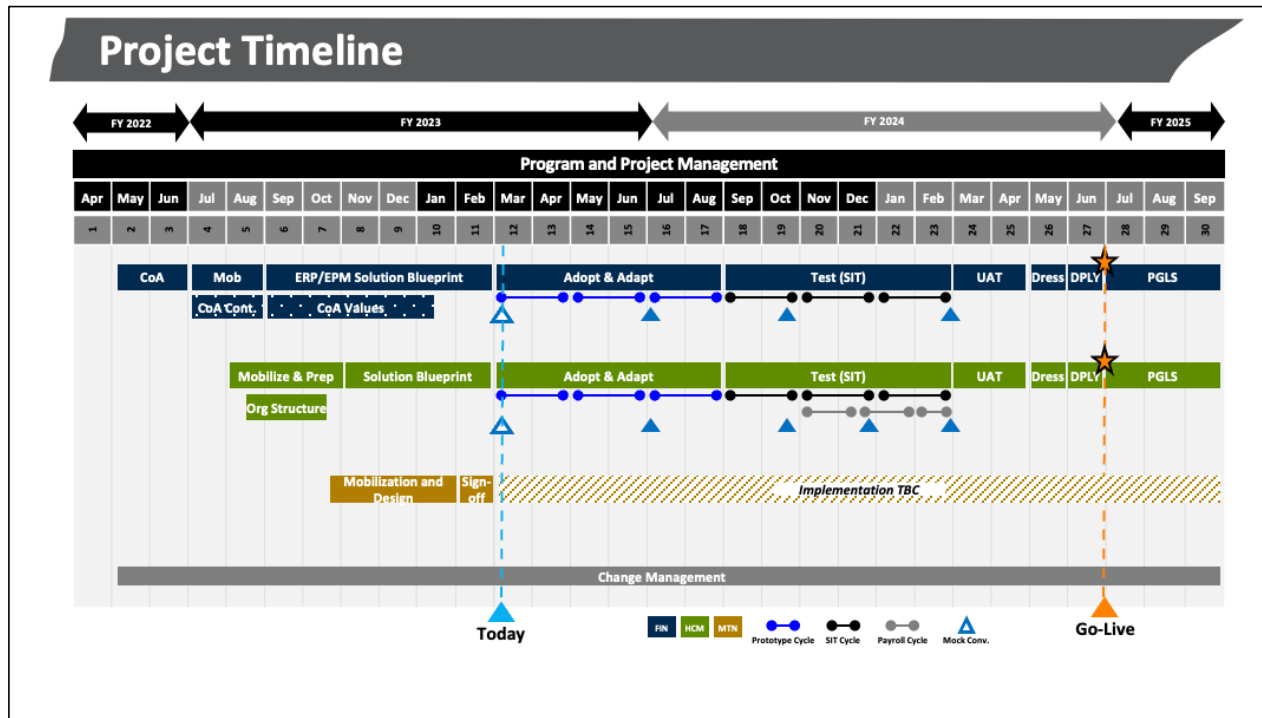
Oracle HCM Cloud (HR)

- Core HR
- Payroll
- Benefits
- Compensation
- Time & Labor
- Absence Management
- Recruitment and Onboarding
- Talent
- Goals
- Performance Management
- Succession Planning

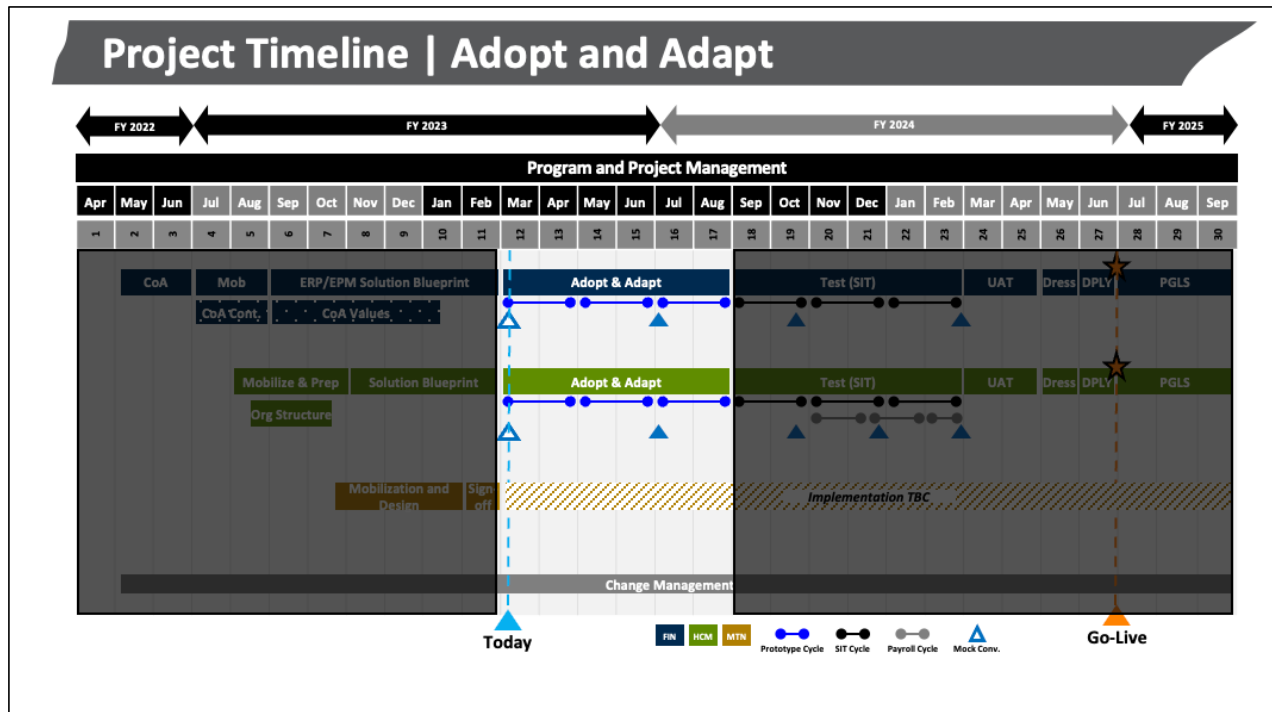
EPM (Planning & Budgeting)

- Financial
- Capital Expenditure
- Workforce Planning

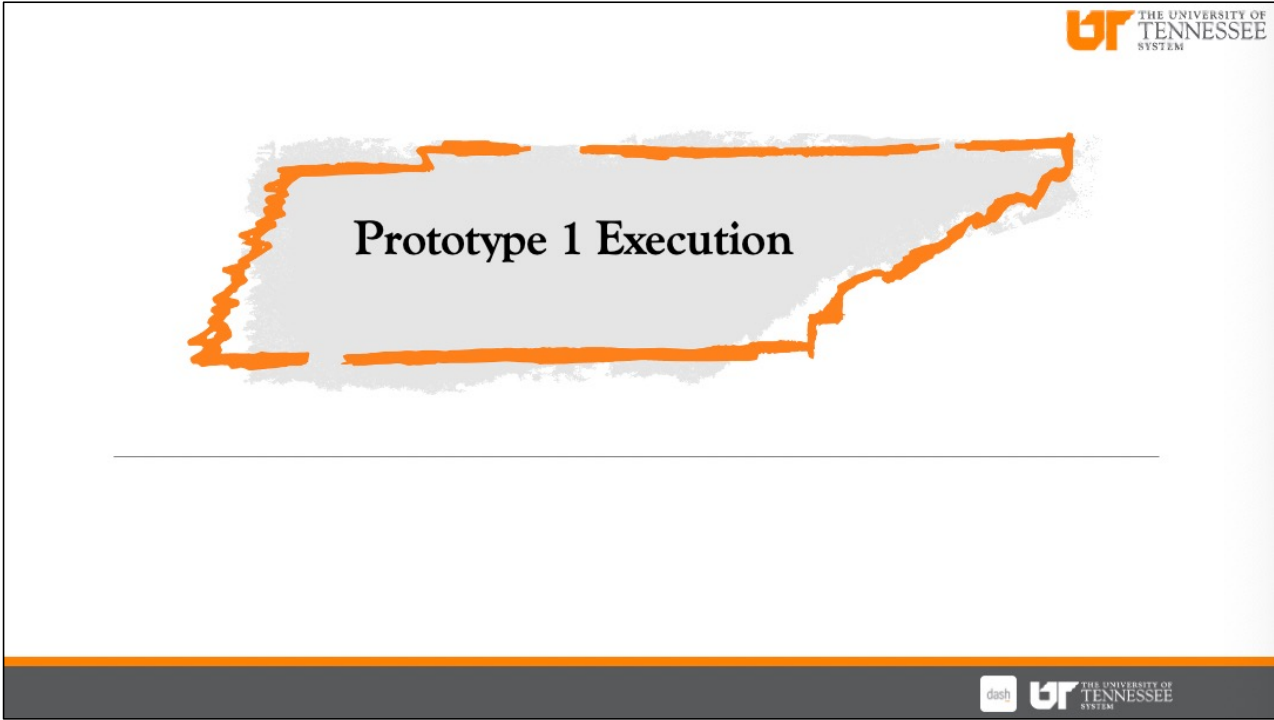
DASH Updates



DASH Updates



DASH Updates



DASH Updates

Prototype Execution | Overview

What are Prototypes?

Prototypes are system demos. This will be UT's first opportunity to see business processes in their own Oracle environment. It gives the process owners and other UT SMEs the ability to see how the system will behave, based on UT's specific requirements, with the purpose of providing more feedback to further refine the solution. By "refine", we mean that the configuration can be modified or updated to make the business process better and more suitable to UT's needs. This feedback is solicited as part of the session itself. Moreover, the team has built in time to the schedule if follow up discussions are needed.

What do we need?

We need participation. We need resources (process owners and campus SMEs) who are highly knowledgeable on the process being shown. Accenture will demonstrate a business process, how it works in Oracle, and why it was configured that way. But we need UT's participation to identify whether the solution can work, or if it could be improved.

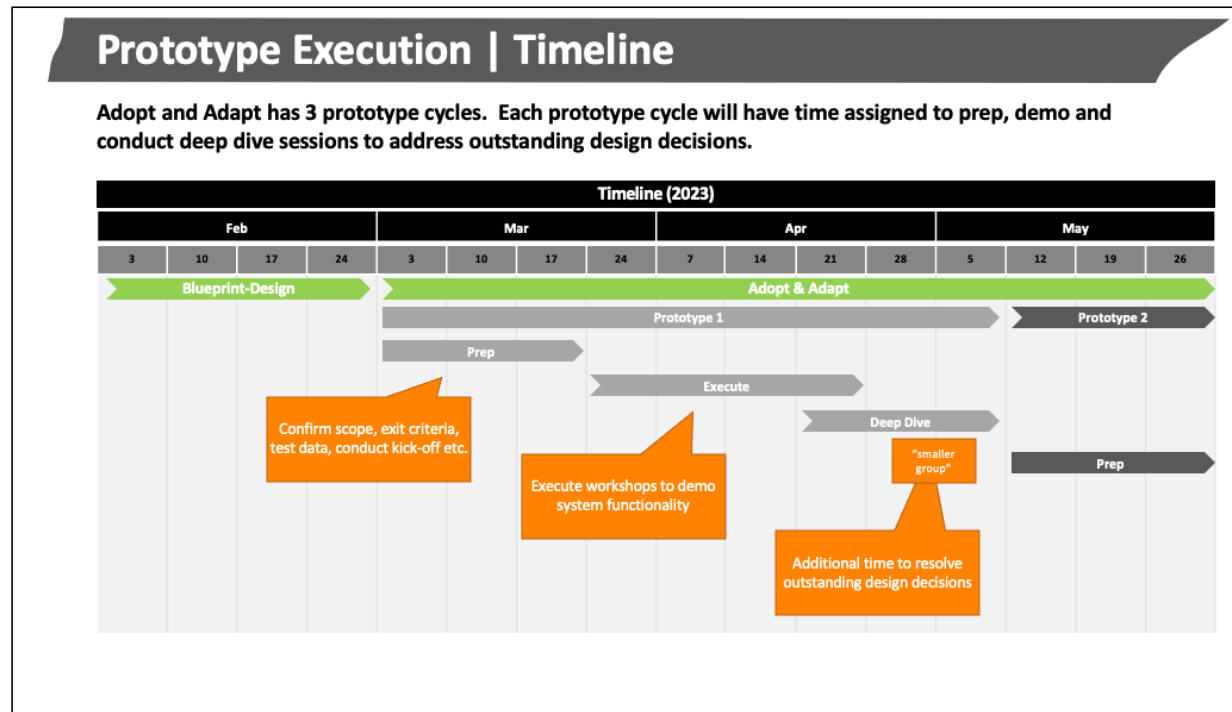
When will prototypes take place?

Between March and July this year. The team has intentionally included 3 prototype cycles. These are three opportunities to review all business processes across all applications to fully validate the design before we move into testing.

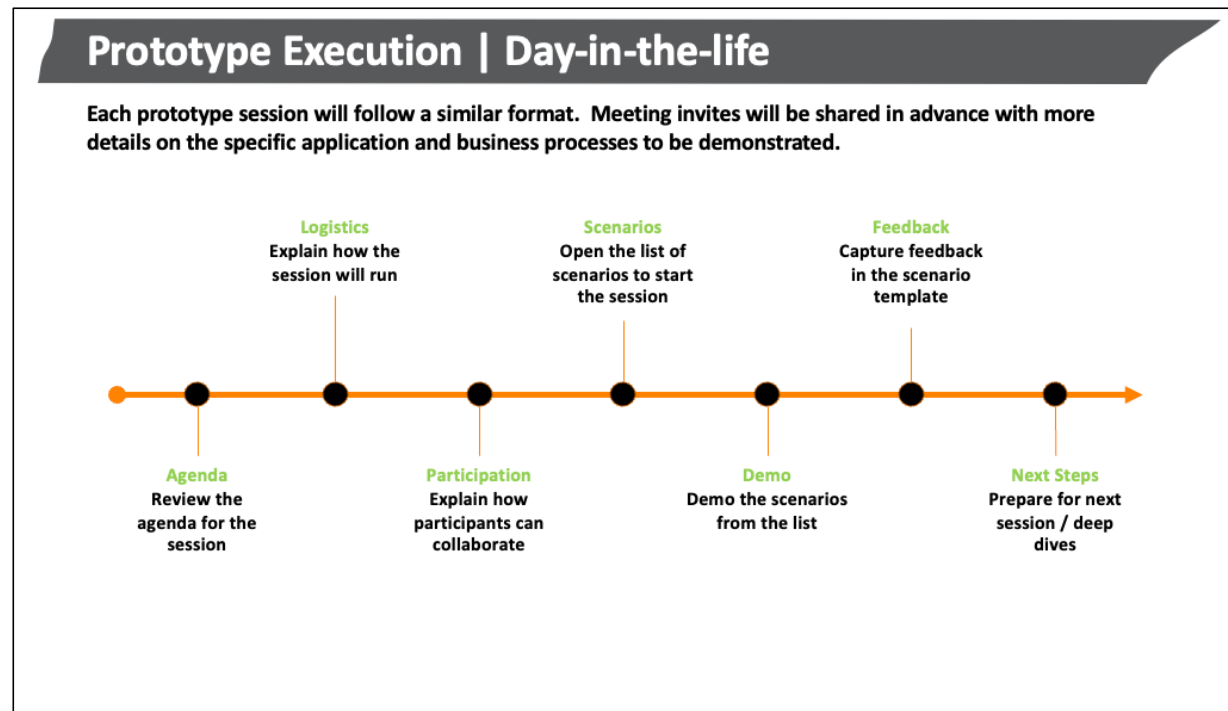
What is the desired outcome?

Alignment to business requirements. Prototype sessions help us validate configuration and that business processes align back to our requirements before moving into testing.

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Prototype Execution | Getting the most of your time

- Remember that **our approach is fit-to-standard best practices** (out-of-the-box) Oracle processes. This means that you may see process flows or sequences that differ from what you and/or your teams do now. Think about whether these differences can be addressed with additional configuration or whether we need to adjust our business processes.
- Keep in mind that **success in Prototype 1 is not strictly a measure of pass/fail**. Everything will not work perfectly so focus on identifying the problem correctly so that the best solutions can be defined.
- The **Prototype sessions are not testing or training**. They give us our first opportunity to see the system and how our data moves through selected processes. This is a bridge between design and the configuration that needs to take place for us to be successful in future phases.
- Each session agenda is full. **Questions and comments are important**, but the agendas may not permit off-topic discussions. Such discussions may be parked to maintain the schedule.
- **Take note of any incomplete process flows or missing business requirements**. Concerns and requests for process improvements captured during Prototype 1 will be actioned by the project team during deep dive sessions (as shown on slide 15 – Prototype Execution Timeline).

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Prototype Execution | Capturing change impacts

Measuring Change Impacts across modules & processes will inform communications, training and other change management activities that will best equip end users to adopt DASH.

- Change impacts will help the University of Tennessee identify **what is changing, who is impacted by the change, and how the change is occurring** across all modules and stakeholder groups as a result of the transition to Oracle.
- During prototype UT and Accenture change analysts and functional SME's will help to identify and capture **information and decisions** that will **inform the level of change impact associated with the design of DASH**. In some cases deep-dive sessions will be required to confirm level of change with more detail from other stakeholders.
- Change impacts will be measured across **People, Process, and Technology** (see the following slide for more details).
- Impacts that assist in measuring DASH benefits, such as **reduction in workflow, improved reporting** and **internal controls**, will also be captured. This may include identifying processes with reduced steps or processing time and meeting reporting needs through real-time dashboards.
- Identifying and defining impacts brings the change into focus at the **individual level** which helps support users through the change.
- Defining impacts helps identify areas of resistance and **determine the specific support** needed for the change and **informs plans for communications, training and other change management activities**.
- The **Prototype sessions are not testing or training**. Training is planned by the OCM team and will occur near end of the Testing phase.

DASH Updates

The slide features a central graphic of a map of Tennessee, outlined in orange with a white fill. The text "Prototype 1 Schedule" is centered within the map. In the top right corner, the University of Tennessee System logo is displayed. In the bottom right corner, the DASH logo and the University of Tennessee System logo are shown. A horizontal line is positioned below the map graphic.

DASH Updates

Calendar View (Proposed)

Sessions will be scheduled on Tue / Wed / Thu where possible. Each session will be either a half or full day, with breaks in the morning / afternoon as well as a 1-hour lunch.

March 2023

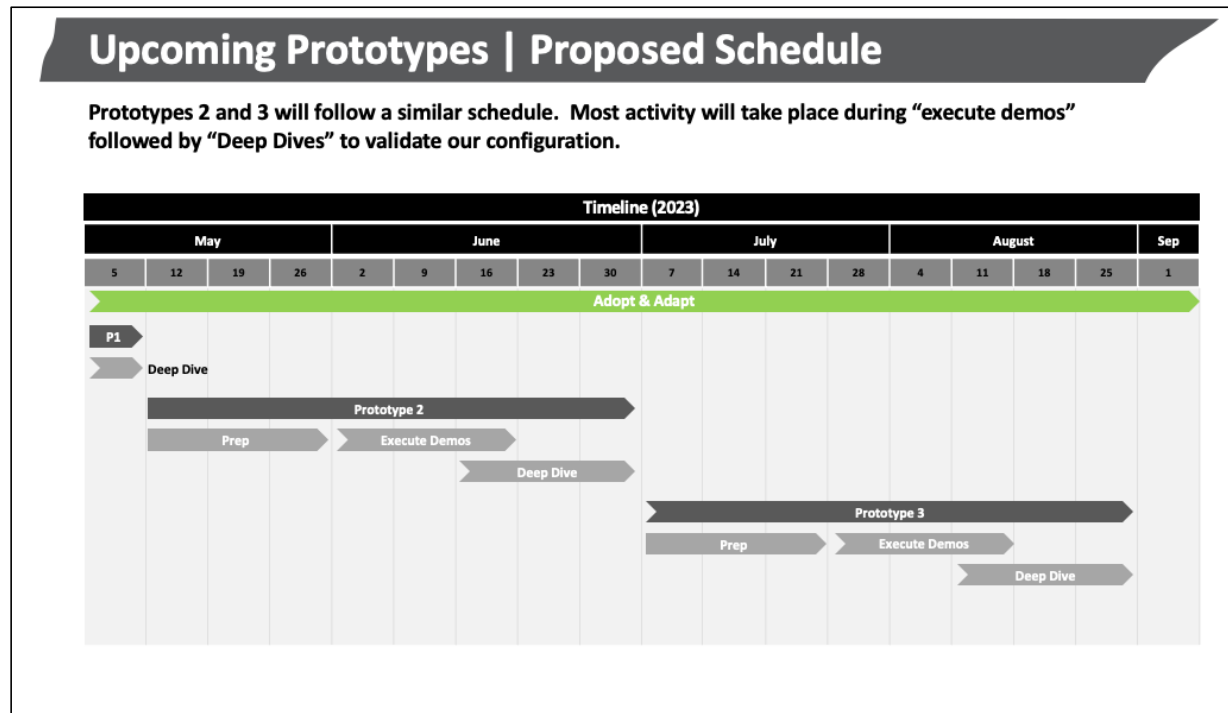
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
26-Feb	27-Feb	28-Feb	1	2	3	4
			P1 Prep (Configuration)			
5	6	7	8	9	10	11
			P1 Prep (Smoke Testing)			
				Kick-Off		
12	13	14	15	16	17	18
	Spring Break					
19	20	21	22	23	24	25
	P1 Execution					
	Proc / Contracts Requisitions	Travel & Exp Core HR I	Projects (Capital) Recruiting	Asset Mgmt. Core HR II	Access Control Accounts Payable	
26	27	28	29	30	31	1-Apr
	P1 Execution					
	Grants / Projects Financial Control	Grants / Projects Talent	Grants / Projects Compensation	Grants / Projects Benefits		

ERP EPM MTN HCM RMC

April 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
26-Mar	27-Mar	28-Mar	29-Mar	30-Mar	31-Mar	1
2	3	4	5	6	7	8
	P1 Execution					
	Accounts Rec. Revenue	Cash Mgmt. T&L / Absence	Expenses T&L / Absence	General Ledger Payroll I	UT Holiday	
9	10	11	12	13	14	15
	P1 Execution					
	Asset Creation Payroll II	Plan & Sch. Budget Request	Maint. Exec. I EDM Demo			
16	17	18	19	20	21	22
	P1 Execution					
	Maint. Exec. II	Inventory	Cost Mgmt. Period Close			
23	24	25	26	27	28	29
	Deep Dives					

DASH Updates



Proposed Budget Calendar

FY 2024 Proposed Budget Schedule

- Base Budget will be copied into X01 on April 03, 2024. Please run reports after this date
- Reminders
 - A Schedule 3 is needed only for accounts have changes
 - Please use only whole numbers on the schedule 03s. NO FORMULAS OR DECIMALS
 - Even with no changes, please submit a filled in FY 2024 Budget control worksheet.
- Due Dates
 - April 14, 2023 – Payroll changes for FY 2024 due at payroll office
 - April 14, 2023 – Position changes for FY 2024 due in budget office. Remember those faculty rank promotions!!
 - April 21, 2023 – **ALL Schedule 3s and Income Worksheets due for FY24 Budget to Budget office!!**

Strategic Plan Presentation



THE UNIVERSITY OF
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Strategic Planning Session:
Engaging YOU for YOUR Feedback

March 2023 Rollout

Where We Are
and
How We Got Here

Timeline of Phases in the Process

Phase 1: Environmental Assessment	January – September 2022	
Phase II: Mission, Vision, Values	July – October 2022	
Phase III: Work Groups: Goals	September – October 2022	
Phase IVa: Work Groups: Strategy and Metric Development	October – December 2022	
Phase IVb: Systematic Review across Work Group Products	December 2022 – February 2023	
Phase V: Draft Plan and Implementation and Operating Plan	February – March 2023	
Phase VI: Broad Review and Comments	March 2023	
Phase VII: Finalize Plan	April 2023	
Phase VIII: Presentation for Approval	Advisory Board	May 2023
	Board of Trustees	June 2023

Phase I: Considerations in Conducting Our Environmental Assessment

- Internal Assessment

- SWOT analyses
- Current campus and college plans
- Surveys of students, faculty, and staff
- Consultant reports
- Internal trends in education, research, and clinical care

- External Assessment

- Accreditation and regulatory requirements
- Key competitors – peer and other institutions
- Demographic trends
- External trends in education, research, and clinical care

Strategic Planning Snapshot to Date

- 1 steering committee
- 10 workgroups
- 120 individuals across colleges, campuses, and administrative units, representing faculty, staff, students, plus external stakeholders

Qualities of Workgroup Members

- Big picture perspective – able to look outside their own unit
- Emotional intelligence to view information from various perspectives and points of view
- Sensitivity to campus culture and political sensibilities
- Understand the interrelationships between units
- Insight to identify common elements or trends
- Congenial, committed, and engaged
- Critical thinking skills
- Forward thinkers

Timeline of Meetings in the Process	2022							2023						
	May	June	July	August	September	October	November	December	January	February	March	April	May	June
Mission, Vision, Values Work Group					X									
Work Group Meetings						X	X	X						
Strategic Plan Session with Co-Chairs					X									
Strategic Plan Town Hall					X						X			
Steering Committee Meeting										X				
Broad Rollout across Campus and State											X			
Health Science Center Advisory Board	X			X			X		X				X	
UT Board of Trustees														X

Now: March 2023

- Campus engagement to provide feedback
- All constituent groups:
 - Internal groups including faculty, staff, students, and more
 - External individuals and groups including community partners
 - Across the state
 - Representing all mission areas
- Strategic Planning Townhall on March 31

Our Starting Point and Foundation:

Mission • Vision • Values

Updated Mission, Vision, and Values

- **Mission**

Transforming lives through collaborative and inclusive education, research/scholarship, clinical care, and public service.

- **Vision**

Healthy Tennesseans. Thriving Communities.

- **Values**



B Bold and impactful



E Embrace diversity



O Optimistic and visionary



N Nimble and innovative



E Excel in all we do



U United and connected



T Transparent and trusted



H Health focused



S Science driven



C Caring and professional

UT HEALTH SCIENCE CENTER. **STRATEGIC PILLARS**

PILLAR #1

**Enhancing
Educational
Excellence**

PILLAR #2

**Expanding
Research and
Scholarship**

PILLAR #3

**Advancing
the Health of
Tennesseans**

PILLAR #4

**Engaging
Tennessee
Communities**

PILLAR #5

**Developing
Talent and
Resources**

Campus Culture and Work Environment • Communications • Data and Data Governance
Diversity, Equity, and Inclusion • Philanthropy

Mission, Vision, and Values

Discussion of Each Pillar

Pillar #1

Enhancing Educational Excellence

Co-chairs:

Tom Laughner, Director, Teaching and Learning Center

Allen Dupont, Director, Institutional Effectiveness

Key Themes, Issues, and Ideas

- Innovative pedagogy and learning spaces
- Interprofessional education
- Preparing students for diverse client/patient populations
- Consistency and communication across colleges
- Recognize faculty work in teaching innovation and accreditation

Indicators of Success – 3 to 5 Years

- Integrated, strongly supported interprofessional education
- More active learning, fewer traditional lectures across programs
- High quality, modern learning spaces which support active learning
- Larger, better qualified, more diverse applicant pools for all programs
- All programs accredited and in good standing

Discussion Prompts

- What additional goals/objectives/tactics should be included in Pillar #1: Enhancing Educational Excellence?
- Where do we (UTHSC) want to be in 5 years with respect to “Enhancing Educational Excellence”?
- What does success look like?

Pillar #2

Expanding Research and Scholarship

Co-chairs:

Kenneth Ataga, Plough Foundation Endowed Chair in Sickle Cell Disease;
Professor, College of Medicine

Monica Jablonski, Associate Dean of Postdoctoral Affairs;
Hamilton Endowed Professor, College of Medicine

Key Themes, Issues, and Ideas

- Recruit and onboard a new Vice Chancellor for Research
- Support faculty development
- Enhance the drug and device discovery, development, design, and licensing pipeline
- Support and develop entrepreneurship among researchers
- Facilitate recruitment and retention of early career investigators

Indicators of Success – 3 to 5 Years

- Expanded state-wide networks for clinical trials and population health
- A biotech incubator that supports innovation and entrepreneurship is well established
- Expanded partnerships with other research entities and clinical facilities

Discussion Prompts

- What additional goals/objectives/tactics should be included in Pillar #2: Expanding Research and Scholarship?
- Where do we (UTHSC) want to be in 5 years with respect to “Expanding Research and Scholarship”?
- What does success look like?

Pillar #3

Advancing the Health of Tennesseans

From External Review of UTHSC's Vital Partnerships

May – June 2022

Oliver Wyman Consultant Group

Key Themes, Issues, and Ideas

- Recruit and onboard Vice Chancellor for Strategic Partnerships
- Develop a framework for vital health care partnerships
- Establish quality and growth focus with all partners

Indicators of Success – 3 to 5 Years

- Expanded mutually beneficial health care partnerships
- Strong, vibrant relationships with partners
- All strategic partnerships are mutually beneficial

Discussion Prompts

- What additional goals/objectives/tactics should be included in Pillar #3: Advancing the Health of Tennesseans?
- Where do we (UTHSC) want to be in 5 years with respect to “Advancing the Health of Tennesseans”?
- What does success look like?

Pillar #4

Engaging Tennessee Communities

Co-chairs:

Sarah Rhoads, Professor and Department Chair, College of Nursing

Charlie Snyder, Associate Vice Chancellor of Student Success

Key Themes, Issues, and Ideas

- Support faculty (training and recognition) who engage with communities and partners
- Engage with communities across Tennessee
- Community advisory boards with broad representation
- Capture and publicize what we do

Indicators of Success – 3 to 5 Years

- Advisory Boards are engaged and provide relevant input
- Carnegie Classification (as a Community Engaged Campus) achieved
- Broad recognition in rural and urban communities of the impact of UTHSC
- Public service and community engagement firmly embedded in curricula across the institution

Discussion Prompts

- What additional goals/objectives/tactics should be included in Pillar #4: Engaging Tennessee Communities?
- Where do we (UTHSC) want to be in 5 years with respect to “Engaging Tennessee Communities”?
- What does success look like?

Pillar #5

Developing Talent and Resources

Inclusive of content from across several
of the cross-cutting workgroups

Key Themes, Issues, and Ideas

- Engage and advocate philanthropically with varied constituencies
- Implement best practices in faculty and staff recruitment, development, and retention
- Promote UTHSC's accomplishments in education, research, and clinical care to internal and external audiences
- Identify measures, regularly monitor, and track and share reports that demonstrate the commitment to DEI

Indicators of Success – 3 to 5 Years

- UTHSC is in the top half of our peers in philanthropy
- Resources, access to data, and data analytics are centralized to better serve the UTHSC community (data-based decision making)
- Increased retention of faculty and staff across the institution
- Consistent and coordinated messaging is established across all UTHSC locations and units

Discussion Prompts

- What additional goals/objectives/tactics should be included in Pillar #5: Developing Talent and Resources?
- Where do we (UTHSC) want to be in 5 years with respect to “Developing Talent and Resources”?
- What does success look like?

Next Steps

Next Steps After March

- Solicit feedback from across UTHSC: no later than April 5
- Feedback is integrated into Strategic Plan: April 5 – 11
- Updated Strategic Plan is presented to Steering Committee: by April 12; feedback due by April 21
- Final revision of Strategic Plan: week of April 24
- Materials to UTHSC Advisory Board: by May 1
- Final version presented to UTHSC Advisory Board: May 12
- Assuming UTHSC Advisory Board approval, Strategic Plan is presented to the UT Board of Trustees for final approval: June 29-30



Our Co-Chairs and Steering Committee thank YOU for your engagement in our strategic planning process!

Next Meeting:
May 23rd @ 1:30PM
GEB A104

