Agenda

• Announcement's – Katrina Spencer

• Library Budget Overview – David Borycz

• Harris Budget Overview – Misho Ceko

• Delphi Updates – Kathleen Fabiny

• Shared Services – Ronn Kolbash
Spring & EOY College Tuition Allocation Timeline

• Spring Quarter
  • Distribution of preliminary Spring data: Wednesday, April 17th
  • Comments to Budget Office/Changes in Workday due: EOD Wednesday, May 1st
  • Reports distributed/allocation transaction submitted: EOD Monday, May 13th

• End-of-Year
  • Deadline for requests for true-ups: EOD Friday, June 7th
  • Deadline for documentation/changes in Workday due: EOD Friday, June 14th
  • Final reports distributed/allocation transaction submitted: EOD Friday, June 28th
Budget Manager’s presentation

David Borycz

April 16, 2019
Library Budget Overview

Total Annual Expenses
$50+ Million
Capital Projects

3 Major Expense Categories
• Staff
• Facilities
• Acquisitions

New Budget Model
• Limited opportunities to increase income
• High capitalization – low flexibility
• Large footprint
# Library Staffing

<table>
<thead>
<tr>
<th>Academic Appointees</th>
<th>Staff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approximately 70 Librarians</td>
<td>Approximately 60 exempt and 70 clerical staff members</td>
<td>Over 300 students representing 70 FTE</td>
</tr>
<tr>
<td></td>
<td>Staff working 24/7/365</td>
<td></td>
</tr>
</tbody>
</table>
Library Facilities

6 Libraries

- Over 500,000 sq. ft. of space
- Regenstein Library the 2nd largest single building on campus
  - 1.4 Million entries last years
  - More than 97% of undergraduates enter Regenstein within first 3 weeks of the quarter
- Currently 8.6 Million physical volumes across campus
- Costs are fixed (capitalized) or unpredictable (utilities)
University of California boycotts publishing giant Elsevier over journal costs and open access

By Alex Fox, Jeffrey Brainard | Feb. 28, 2019, 7:00 PM
New Budget Model

1. Limited opportunities to increase income without passing on costs

2. High Capitalization – low flexibility

3. Large Footprint
Thank You

David Borycz

dnborycz@uchicago.edu
Harris at 30 Years

1988
• 14 Faculty
• 42 Students
• 3 Degrees

2019
• 49+ Faculty
• 829 Graduate Students
• 310 Undergrads
• 9 Degrees + 8 Joint Degrees
• 3,404 Alumni
• 17 Centers
• Top 5 School
Mission

To develop leaders who put evidence first.

- Feeling Good ≠ Doing Good
  No shortcuts—policy is serious work.

- Status-Quo
  Question conventional wisdom—fearlessly.

- Local ↔ Global
  Harness the potential of our global city—and connect it to the world.

- Enthusiasm + Impact
  Nurture our students’ passions—and guide them toward impact.

- Learning + Doing
  Our students don’t wait for a license to practice—they seek impact from day one.
Enrollment Trajectory

FY19: 829 graduate students
• Full-time: 691
• Part-time: 107
• PhD: 31

FY20: >1,000 graduate students
• Full-time: 811
• Part-time: 157
• PhD: 30-35
Application Trends

INCOMING MASTERS TRENDS

MASTER ADMIT AND YIELD RATE
Incoming Student Profile

Fall 2018

474 Graduate Students*

MPP 266
Evening Program 55
MSCAPP 54
MACRM 24
MAIDP 26
MSESP 9
DEMHP 22
MA 11
PhD 7

310 Undergraduate Policy Majors**

Student Demographics

FEMALE 54% 46% MALE

INTERNATIONAL 52% 48% US

UNDER-REPRESENTED MINORITY (Domestic) 23%

40 Countries

(top including US)

Top 4 international countries

• China
• Mexico
• India
• Japan

Work Experience

• 17.9% advanced degree
• 34.9% 0-1 years
• 31.6% 2-4 years
• 33.6% 5+ years

MPP 266
Evening Program 55
MSCAPP 54
MACRM 24
MAIDP 26
MSESP 9
DEMHP 22
MA 11
PhD 7

*As of 10/3/18
**Declared as of Fall 2018; all undergraduates, not limited to incoming class
Career Outcomes

Class of 2017

96% of reporting 2017 graduates secured employment

91% of reporting 2017 graduates secured employment

4.4% pursued PhD after graduation

Sector Outcomes

- Public/Gov’t: 23%
- Nonprofit/NGO/IGO: 36%
- Private: 41%

Internships*

- Paid: 85%
- Unpaid: 15%

Top Policy Areas

- Economics and Fiscal Policy
- Education Policy
- Health Policy

Accepted Job Offers (within three months of graduation)

- 82%

Location

- United States: 72%
- International: 28%

*Class of 2018
Building Momentum

University Initiatives Housed at Harris
• Urban Labs
• Undergraduate Major
• Civic Leadership Academy

New Programs
• Obama Foundation Scholars/MAIDP
• LSE / Double Executive Master’s

Partnerships and Initiatives
• UChicago Harris/AP-NORC Poll
• Cyber Policy Initiative
Achieving Excellence

- Building a collaborative culture that advances **operational excellence**

- Fostering **diversity and inclusion** across the school

- Refining our operation to match our new scale and prominence at **Keller Center**
Questions?
### University Invoice Data

#### Step 1: Resolve Scanning Issues
- **SSO Manual Verification**
  - Step 1 - OCR: SSO verifies and corrects invoices with the following errors: PO pairing, missing PO #, and vendor mismatch.
  - Step 2 - BuySite: SSO verifies and corrects invoices with tax, miscellaneous fees, after the fact POs, and invoice import errors.
  - Step 3 - APS: SSO manually keys invoices into APS if PO has fished or PO has a drop flag.

#### Step 2: BuySite Workflow
- **Campus Manual Verification**
  - Campus approval required in BuySite if PO is over $5k or there is a discrepancy between the PO and invoice extended price.

#### Step 3: APS Voucher Created
- Note: Supplier portal and cXML invoices bypass Easy Access and inject directly into BuySite.
- Baseline calculated from Pilot performance 10/8 - 12/2

#### Step 4: Payment Sent to Vendor

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### AP Automation Pilot

**Invoices Completed Steps Dec 2018 - March 2019**

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Metric</th>
<th>Step 1: OCR Easy Access</th>
<th>Step 2: BuySite (c)</th>
<th>Step 3: APS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Processed</strong></td>
<td>SSO Manual Verification (a)</td>
<td>Volume (# of Invoices)</td>
<td>8,001</td>
<td>1244</td>
<td>1903</td>
</tr>
<tr>
<td></td>
<td></td>
<td>% of Total</td>
<td>35.5%</td>
<td>3.3%</td>
<td>5.1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Avg Cycle Time (Days)</td>
<td>3.1</td>
<td>6.9</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Campus Manual Verification (b)</td>
<td>Volume (# of Invoices)</td>
<td>-</td>
<td>2646</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>% of Total</td>
<td>-</td>
<td>7.0%</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Avg Cycle Time (Days)</td>
<td>-</td>
<td>4.8</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td><strong>Total Invoices Completed Step</strong></td>
<td>Volume (# of Invoices)</td>
<td><strong>22,562</strong></td>
<td><strong>37,858</strong></td>
<td><strong>37,455</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total Avg Cycle Time</strong></td>
<td>Avg Cycle Time (Days)</td>
<td><strong>1.5</strong></td>
<td><strong>1.3</strong></td>
<td>-</td>
</tr>
<tr>
<td></td>
<td><strong>Total &quot;Touchless&quot; Processing</strong></td>
<td>% of Total</td>
<td><strong>60.3%</strong></td>
<td><strong>90.2%</strong></td>
<td><strong>94.9%</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Pilot &quot;Touchless&quot; Processing (Baseline) (d)</strong></td>
<td>% of Pilot Total</td>
<td><strong>77.1%</strong></td>
<td><strong>90.1%</strong></td>
<td><strong>92.5%</strong></td>
</tr>
<tr>
<td></td>
<td><strong>OCR EA Invoices Processed &lt;= 2 Days</strong></td>
<td>% Cycle Time &lt;= 2 (Days)</td>
<td><strong>84.2%</strong></td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

(a) Campus Manual Verification - Campus approval required in BuySite if PO is over $5k or there is a discrepancy between the PO and invoice extended price.

(b) Note: Supplier portal and cXML invoices bypass Easy Access and inject directly into BuySite.

(c) Baseline calculated from Pilot performance 10/8 - 12/2

(d) SSO Manual Verification -
- Step 1 - OCR: SSO verifies and corrects invoices with the following errors: PO pairing, missing PO #, and vendor mismatch.
- Step 2 - BuySite: SSO verifies and corrects invoices with tax, miscellaneous fees, after the fact Pos, and invoice import errors.
- Step 3 - APS: SSO manually keys invoices into APS if PO has fished or PO has a drop flag.
Robotic Process Automation (RPA): Overview

RPA is configurable software that allows users to create “bots” to perform tasks that humans do. The tasks are assigned and controlled by staff. This “digital” workforce can interact with any system or application they same way staff do.

<table>
<thead>
<tr>
<th>What RPA Can Do...</th>
<th>What RPA Can Do...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open email and attachments</td>
<td>Scrape data from the web</td>
</tr>
<tr>
<td>Log into web/enterprise applications</td>
<td>Connect into system API’s</td>
</tr>
<tr>
<td>Move files and folders</td>
<td>Make calculations</td>
</tr>
<tr>
<td>Copy and paste</td>
<td>Extract structured data from documents</td>
</tr>
<tr>
<td>Fill in forms</td>
<td>Follow “if/then” decisions/rules</td>
</tr>
<tr>
<td>Read and write into applications</td>
<td></td>
</tr>
</tbody>
</table>
Suitable Processes: Common Characteristics

<table>
<thead>
<tr>
<th>Access to Multiple Systems</th>
<th>Core strength is the ability to work across multiple systems. Can also handle processes within a single system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prone to Human Error</td>
<td>Ability to be mistake free, attention never wavers. Works without interruption</td>
</tr>
<tr>
<td>Logical Rules</td>
<td>Robots are very good at following rules (If ‘A’ Then ‘B’)</td>
</tr>
<tr>
<td>Little Human Involvement Required</td>
<td>Excel where process can be completed from start to finish without human involvement (unattended bot) but can be used in processes that require human interaction as well (attended bot)</td>
</tr>
<tr>
<td>Limited Exceptions</td>
<td>Best fit where exceptions are limited though exception handling can be programmed to divert to staff</td>
</tr>
</tbody>
</table>
## Basics of RPA

<table>
<thead>
<tr>
<th>Developer Tools: Used to define &amp; create jobs</th>
<th>• The sequence of step-by-step instructions a robot can follow to perform the business task/process</th>
</tr>
</thead>
</table>
| **Robot Controller:** Stores defined jobs and assigns jobs to software robots | • Provides a master repository of defined jobs  
• Supports operational governance with the ability to manage appropriate roles and permissions  
• Assigns jobs to single or grouped robots to execute: Monitors and reports their activities |
| **Software Robot (Bot):** executes defined jobs | • Interacts directly with business applications to complete defined tasks/processes |
### RPA: Mitigates Operational Risk and Improves Service Levels

<table>
<thead>
<tr>
<th>Key Benefits</th>
<th>Non-invasive technology: overlaid on existing systems with existing data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Accuracy and Control</td>
<td>Programmed to follow rules. Bots will not deviate from assigned steps</td>
</tr>
<tr>
<td>Increased Availability</td>
<td>Can operate 24/7/365 with no/minimal additional cost</td>
</tr>
<tr>
<td>Audit Trail</td>
<td>Full record of steps/actions taken</td>
</tr>
<tr>
<td>Traceability and Succession Planning</td>
<td>In-scope processes are documented and automated through RPA technology</td>
</tr>
<tr>
<td>Scalable</td>
<td>Easy to ramp up and down to match workflow and needs</td>
</tr>
<tr>
<td>Increased Process Speed</td>
<td>Bots can perform tasks at the fastest possible pace</td>
</tr>
<tr>
<td>Improved Employee Morale</td>
<td>Relieves staff of burden of performing manual/repetitive tasks and focus on higher level work</td>
</tr>
</tbody>
</table>