Budget Office

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

THE UNIVERSITY OF CHICAGO | THE UNIVERSITY OF CHICAGO Library

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

Academic Appointees	Staff	Students
Approximately 70 Librarians	Approximately 60 exempt and 70 clerical staff members Staff working 24/7/365	Over 300 students representing 70 FTE

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)

Acquisitions

Patrons of the library at the University of California, Berkeley, will no longer have easy access to journals from the publisher Elsevier. CHUCKSTOCK/SHUTTERSTOCK.COM

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

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Harris School of Public Policy

Misho Ceko

Senior Associate Dean | Chief Operating Officer

THE UNIVERSITY OF CHICAGO
Harris Public Policy

Budget Meeting
April 16, 2019


THE KELLER CENTER
HARRIS SCHOOL OF PUBLIC POLICY
& THE PEARSON INSTITUTE

Harris at 30 Years

1988

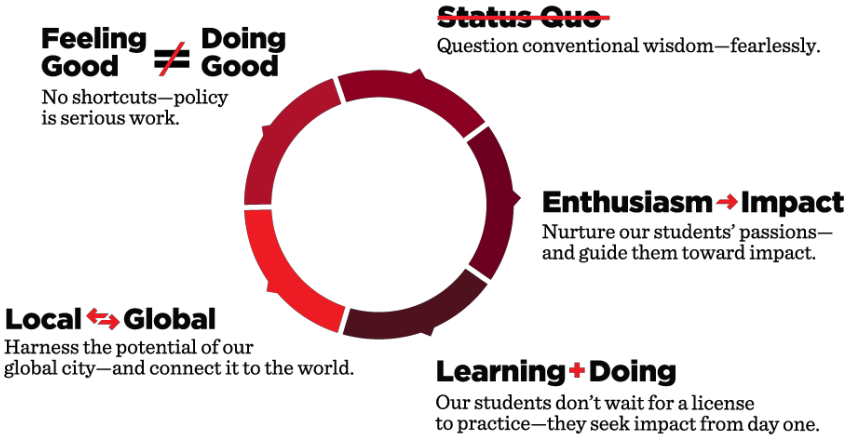
- 14 Faculty
- 42 Students
- 3 Degrees

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.



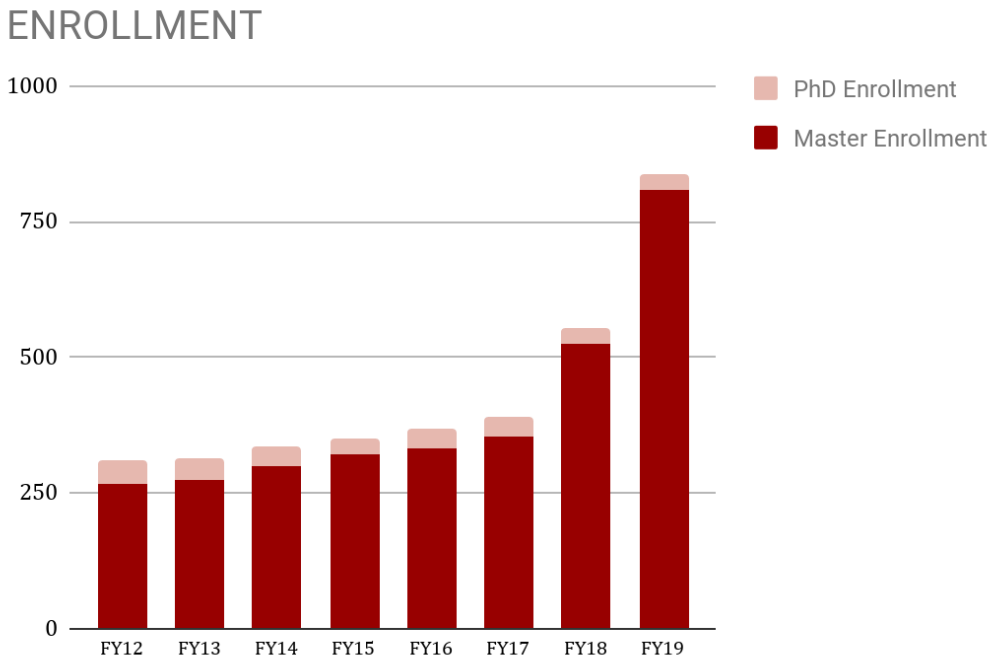
Enrollment Trajectory

FY19: **829** graduate students

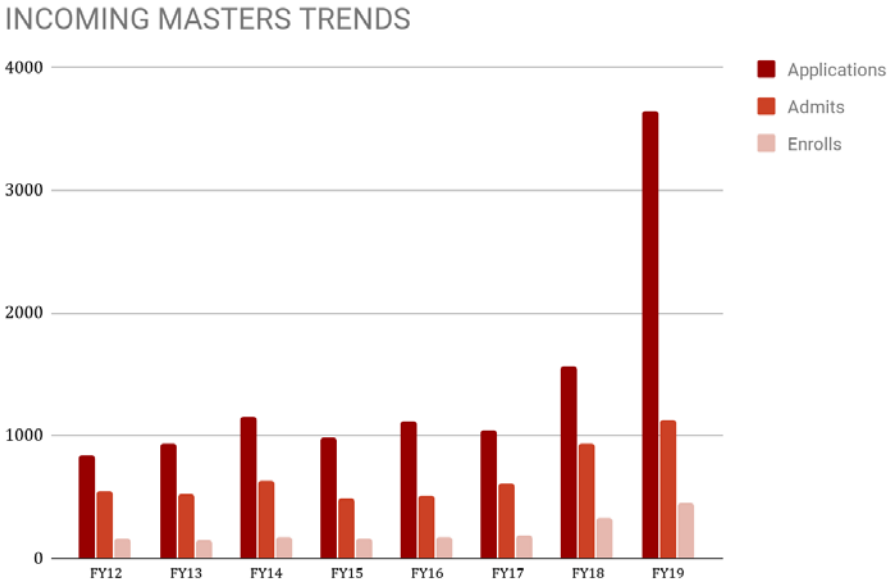
- Full-time: 691
- Part-time: 107
- PhD: 31

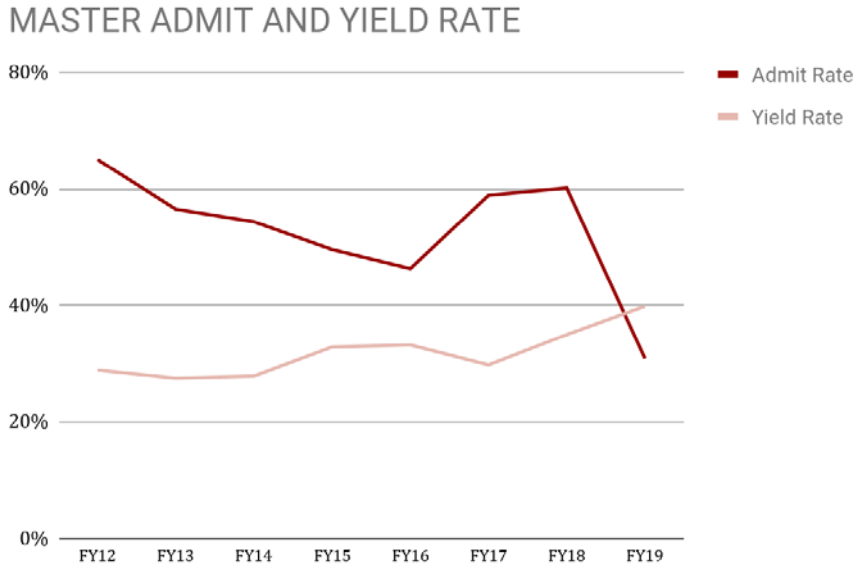
FY20: **>1,000 graduate students**

- Full-time: 811
- Part-time: 157
- PhD: 30-35



Application Trends





Incoming Student Profile

Fall 2018

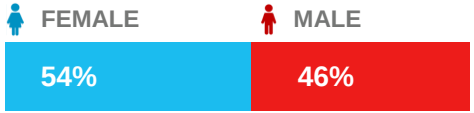
474

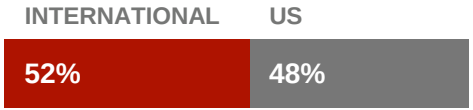
Graduate Students*

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





UNDER-REPRESENTED MINORITY (Domestic)

23%

40

Countries

(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

THE UNIVERSITY OF CHICAGO
Harris Public Policy

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

Career Outcomes

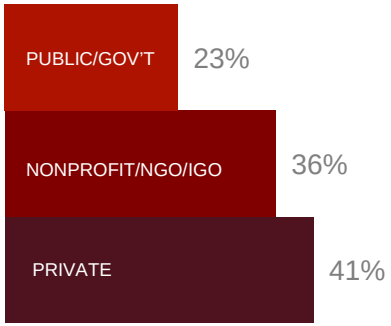
Class of 2017

96%
of reporting 2017 graduates secured employment

Accepted Job Offers
(within **three months** of graduation)
82%

4.4% **pursued PhD after graduation**

Sector Outcomes



91%
Job satisfaction
POSITIVE TO NEUTRAL

Top Policy Areas

- **Economics and Fiscal Policy**
- **Education Policy**
- **Health Policy**

Internships*

85% PAID
15% UNPAID

LOCATION

72% UNITED STATES
28% INTERNATIONAL

**Class of 2018*

Building Momentum

University Initiatives Housed at Harris	New Programs	Partnerships and Initiatives
• Urban Labs • Undergraduate Major • Civic Leadership Academy	• Obama Foundation Scholars/MAIDP • LSE / Double Executive Master's	• 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

AP Automation Pilot Invoices Completed Steps Dec 2018 - March 2019					
Status	**Description**	**Metric**	**Step1: OCR Easy Access**	**Step 2: BuySite (c)**	**Step 3: APS**
Processed	SSO Manual Verification (a)	Volume (# of Invoices)	8,001	1244	1903
		% of Total	35.5%	3.3%	5.1%
		Avg Cycle Time (Days)	3.1	6.9	-
	Campus Manual Verification (b)	Volume (# of Invoices)	-	2646	-
		% of Total	-	7.0%	-
		Avg Cycle Time (Days)	-	4.8	-
	Total Invoices Completed Step	**Volume (# of Invoices)**	**22,562**	**37,858**	**37,455**
	Total Avg Cycle Time	**Avg Cycle Time (Days)**	**1.5**	**1.3**	**-**
	Total "Touchless" Processing	**% of Total**	**60.3%**	**90.2%**	**94.9%**
	Pilot "Touchless" Processing (Baseline) (d)	**% of Pilot Total**	**77.1%**	**90.1%**	**92.5%**
	OCR EA Invoices Processed =< 2 Days	**% Cycle Time =< 2 (Days)**	**84.2%**	**-**	**-**

(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 fiched 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.

What RPA Can Do…	
• Open email and attachments • Log into web/enterprise applications • Move files and folders • Copy and paste • Fill in forms • Read and write into applications	• Scrape data from the web • Connect into system API’s • Make calculations • Extract structured data from documents • Follow “if/then” decisions/rules

Suitable Processes: Common Characteristics

Access to Multiple Systems	Core strength is the ability to work across multiple systems. Can also handle processes within a single system
Prone to Human Error	Ability to be mistake free, attention never wavers. Works without interruption
Logical Rules	Robots are very good at following rules (If ‘A’ Then ‘B’)
Little Human Involvement Required	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)
Limited Exceptions	Best fit where exceptions are limited though exception handling can be programmed to divert to staff

Basics of RPA

Developer Tools: Used to define & create jobs	• **The sequence of step-by-step instructions a robot can follow to perform the business task/process**
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

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