0:0:0.0 --> 0:0:25.340
Janet Strader
Good morning. Thanks for joining us today for the business manager meeting. The next one will be in September. We have a full agenda today. I'm Janet, Director of the Budget Department.   My team: Jessica, our newest member Etta and Brian. Our team works under Tara. We appreciate all of you being here: those who are here physically and those who are listening in. Can you hear us?

0:0:27.730 --> 0:0:28.780
Michelle LeMatty
We can hear you, Janet.

0:0:27.970 --> 0:0:28.990
Kirsten Miller
Yes, perfect.

0:0:29.400 --> 0:1:21.429
Janet Strader
Great. We will get started. We're working on the FY24 budget right now. The budget bases are updated and ready to go for FY24. We're working to get the budget approved. We hope to have the scheduled budget bases, budget workbooks, all the supporting documentation to you in the next couple of weeks. We appreciate your patience as we get all of that wrapped up and ready to go.

0:1:21.430 --> 0:2:34.930
Tara Thomason
I'm up next. We're going to start with some really strong financial news. We're going through our fiscal year 2023 results. This is our net tuition revenue growth. You can see from where we were showing fiscal year 19, 20, 21, (which have dips) and 22. If I put more years out here, you would see that our net tuition revenue is around $270,000,000. Our budget for fiscal year 2023 and our projection for fiscal year 24. The budget is the original one that went to the board a year ago. The projection has been updated since December and where we think we really will land for 23. You can see that our net tuition revenue is at about 290 million. So, we've increased that tuition revenue the first time in years. This is really good news for SLU. You can see by the color coding, the orange is related to the global grad initiative. So anybody who's been working on global grad, which are primarily students coming in from India, that is the reason for our increase in net tuition revenue this year, in fiscal year 23, compared to prior year. That is a really strong result. We expect, as we're working on the 24 budget, we expect a similar increase in net tuition revenue there. This is really good news for SLU to start off with that.

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Tara Thomason
And we'll go to the next slide.

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Tara Thomason
OK, so this slide shows our original budget that we would have gone to the board with last year and where we are now based on December results and where we think we'll lay out in fiscal year 23. The original budget, every year when we go to the board, we have to show them at least the breakeven budget, which is why there's a zero over there to the right, because we had to break even. Then we had

a lot of changes this year to the budget. We sold SLUCare, so there's a lot of changes in the fiscal year 23 numbers and that's what the slide is showing. The first is the gain on the sale of SLUCare. As you know, on July 1st, we sold SLUCare and we also sold a couple buildings. We sold the DOB (Doctors Office Building), SAP (SLU Academic Pavilion) and Drummond. From that transaction, we recorded a $250 million gain. So that's in our financial statements this year, in fiscal year 23, and that cash primarily was invested in the endowment, which brings us down to the next line, additional endowment income. SLU Endowment sits at about 1.6 to $1.7 billion right now. Then we spin off interest income from the endowment into our operations to help support SLUs operations. So because of the sale of SLUCare, additional money went into the endowment, and now we have additional interest income supporting the organization, which is this line here of about 11 million. So that's all positive. So that's one reason why the sale looks really good. A really good item for Saint Louis University. The second item, along with the sale of SLUCare, the team negotiated from SSM, they are paying us $15 million a year from now through the next 30 years to help with SLU Mission and Research. So we have additional $15 million that comes from SSM every year to help our bottom line. Moving down to this line, SSM TSA revenue and rent revenue. This is one-time additional revenue from SSM. If anybody was part of the SLUCare transaction, you know we had TSA. That stands for "transition services agreement" with us where they were using our IT, they used our Workday, different items like that. They are paying us. They are paying us for those items and then they also pay to use some of our space. PMO and the Call Center were in Wool Center for a while, so they were paying for it. That's one time revenue that we're recording in fiscal year 23 that we won't have in 24. But it's a result of the transition. Next item: we sold Top Golf for 4.7. We had a gain of 4.7 million on that. So we'll recognize that in our fiscal year 23 financial statements. This next one: savings from SLUCare overhead costs. That's 1.7 million. When we sold SLUCare, we sold all the people, everyone that worked under SLUCare. But then we also have some savings that an organizational like SLU, corporate level where some of that. We had savings in HR, compliance and legal. Because we are 40% smaller now, without SLUCare, we now have certain organizational structures that are smaller. That was $1.7 million of savings. This next item is Global Grad Initiative. This kind of relates back to the prior slide, where we said the orange part of the bar was the increase in global grad revenue. We have additional expense because we need to continue to grow that program. So that's $1,500,000 that we are using to grow our Global Grad Initiative. We have a downside of $2,000,000 because of our 403B. In fiscal year 23, back in January, we went back up to the 10% match. That costed the university $2,000,000, which was not included in the original budget. As related to the sale of SLUCare, we have some stranded costs for SLUCare. We still had open AR, out of patients, that we're now buying back time from SSM and we're using their individuals to run down AR. So we still have operating costs as we run down the SLUCare operations prior to 6/30. So that's what that 4,100,000 is. The next item is geospatial funding. If you recall in fiscal year 22, we received 75 million in from the Taylor Gift to support geospatial and we recorded all of that revenue in fiscal year 22. Then we spend it every year. This is the additional spend (that was not included in the budget). The revenue was recorded last year. Now, every year going forward, will have spend on that gift as we complete the items needed under the original agreement for the 75 million. This is just all other items coming together: the budget last year removal of SLUCare profit. So in the budget last year we had profit from SLUCare of 7.4 million. Now that SLUCare does not exist, we no longer have that. So that is a downside in our projections for fiscal year 23 and then School of Medicine, as they have revamped their structure, they are using this additional 15 million that they are receiving every year from SSM to revamp their organizational structure. In summary, it was a lot of detail. Basically, we went from a balanced budget of zero that went to the board. Since then we've sold SLUCare and have had a lot of other operational changes. But we're expecting to end this year with a $248 million gain. The gain is almost equal to the 249,000,000 that we got. It might be way too much information for people who are not in accounting.

0:8:34.70 --> 0:8:35.140
Tara Thomason
Alright, this is me again.

0:8:37.0 --> 0:9:33.430
Tara Thomason
All right, fixed assets. This topic is near and dear to my heart because we have audit findings. This item is under the controller’s office and under accounting with Karen Wamhoff. Her and her team handle all of our fixed assets. We are going to be tightening up some of our controls around that because of audit findings that we've had. Right now, what is happening is if you buy capital equipment, you tag it to a trackable spend category. Karen's team will review it if it's over $5,000, it's able to be capitalized, and it has a useful life of more than two years. That's our current process. It sounds like in the past, we had a form that went out for departments to complete. Since implementing Workday, we have not been diligent about that. So beginning in January, this form came back. If you spend something, if you had something in one of the expendable categories, Karen Wamhoffs team will be sending you this form to complete so we can have better tracking. This is where we're getting a lot of trouble. We have audit findings from fiscal year 21 and also fiscal year 22 where we have assets, specifically research assets bought with federal dollars, which is why this is a very important topic. We absolutely have to track where it is at SLU, the serial numbers. This is all part of federal regulation. If you take federal dollars from the federal government, you have to track it and we have not been good at that. We're bringing in an accounting firm and we're going to do a full physical inventory of all research equipment and ensure that we have serial numbers, users, locations, etc. All of this information will be updated in Workday, which is currently not the case. So that is a high priority item.

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Tara Thomason
We'll go to the next one: this is just a screenshot of the form. If you buy a piece of equipment, this is what Karen’s team will be sending to you to fill out.

0:10:55.980 --> 0:11:49.970
Tara Thomason
OK, so I kind of touched on this, but we have a policy where every two years (and this is required by the federal government) if you take federal dollars, every two years, all of your fixed assets, you have to do a physical inventory. This is where we've had issues. KPMG went to go find assets. It was not an easy process because we don't have all of the information in Workday tracking. This is something where we will be having, as I mentioned, an accounting firm that's going to come in before June and do a complete, 100% fixed asset verification so that we don’t have these audit findings for the fiscal year 23 audit. Currently, the process is (and I think Myesha just went through): You guys should have received a listing of your assets, asking to sign off. What departments did we do this year?

0:11:50.620 --> 0:11:58.510
Karen Wamhoff
We did medical school.

0:11:58.512 --> 0:12:33.670
Tara Thomason
If you're in the medical school, you should have done that. However, if you're not in the medical school and you have research equipment, there's a good chance to do it before June anyways, because we're going to go through and do it all. And so those forms, the normal process of these forms would go out to each department. We would do Frost campus one year, we would do medical school and then we would return it and we would update Workday. And that is the piece that has not been working properly. So were doing improvements on that. But that's very, very important that when you get these forms, they are completed. We are also looking at (IT is helping us) at automating this process too. So we're hoping to, in the future, be able to, instead of using forms that go through PDF, he's working on some kind of tool that will help automate verifying this.

0:12:34.410 --> 0:12:39.970
Audience Member
So there's a form to fill out if we get a new one. Is there form to fill out if you transfer one?

0:12:44.410 --> 0:13:28.630
Tara Thomason
Yes. Let's go to the next slide. OK, we created a new form for when we dispose of our transfer because this is also something that we haven't updated. KPMG went to go find the piece of equipment, it was no longer in that spot or had to be disposed of and our Workday records were not updated. So we now have a new disposal and transfer form. We are requesting that after you dispose of an asset or you move it within 30 days, you contact Karen Wamhoffs team and let them know of that change so we can get Workday updated ASAP. Again, all of these items, we are looking for better ways to handle it and more automated ways, as opposed to forms. This is where we're at right now. This one is really important because this is also a finding from our audit.

0:13:31.770 --> 0:13:36.230
Lesley Smith
Can I ask a question? This is Leslie Smith.

0:13:37.0 --> 0:13:38.880
Tara Thomason
Thank you for helping on the audit. Thank you.

0:13:39.450 --> 0:14:21.0
Lesley Smith
Oh, sure. So, we had, as an example, a piece of equipment, a drone, so I would imagine as an item that's being more like, IT related. The depreciation schedule would have been like a five-year depreciation. So when you're doing these equipment audits, are you looking at it like, OK, if this item should have been on a 5 year depreciation schedule, are you going to try and find those items too or do we do we need to be…Umm...Obviously, we still had our piece of equipment, but do we need to be filling out forms for items that are sort of past their useful life?

0:14:22.840 --> 0:14:29.590
Tara Thomason

One thing I'll say real quickly is that's not part of what the federal government cares about, so it's not on our radar.

0:14:29.320 --> 0:14:32.200
Lesley Smith
OK.

0:14:32.530 --> 0:14:33.690
Tara Thomason
to fix before June, but for financial purposes, we do put it all in there.

0:14:34.970 --> 0:14:36.770
Lesley Smith
Got it. Thank you.

0:14:37.180 --> 0:14:58.510
Karen Wamhoff
Basically, as long as we still have the asset and it's still being used, we need to verify it and track it. It doesn't matter if it's fully depreciated or not. We have assets that are 30 years old that are still being used. Of course, they're fully depreciated, but we still need to track them because they were bought with federal dollars. So, they need to be tracked still.

0:14:59.810 --> 0:15:0.540
Lesley Smith
OK. Thank you.

0:15:2.510 --> 0:15:6.240
Karen Baxter
I have a question. This is Karen Baxter.

0:15:8.650 --> 0:15:32.130
Karen Baxter
What about equipment? You're talking about federal dollars. What about equipment that is transferred to another institution or sold to another institution? Is there a form? I know for transferring to another institution, we have a relinquishing statement. But what about sold?

0:15:34.500 --> 0:15:44.30
Karen Wamhoff
You can use the new disposal transfer form that that we've created. That would be a disposal if it was sold to another institution or transferred with the researcher.

0:15:44.720 --> 0:15:45.350
Karen Baxter
OK.

0:15:44.890 --> 0:16:0.930
Tara Thomason

I was going to say I would like also the support of whatever the agreement is. You know: who we sold it to or whatever, because I hear that there's instances where researchers take the equipment with them, so I'd like to see where that was formally documented and agreed to.

0:16:1.710 --> 0:16:10.600
Karen Baxter
Right. And if it is sold, do we have a formalized agreement for the sale of equipment?

0:16:12.460 --> 0:16:19.800
Tara Thomason
We should. We should have something in writing. That would then go with the disposal form to Karen.

0:16:20.520 --> 0:16:37.830
Karen Baxter
OK. And are the auditors going to review that sale, that equipment sale form and ensure the steps are being followed, you know, so that everyone is aligned with how that is happening?

0:16:38.850 --> 0:16:48.990
Tara Thomason
Yes. So, any disposal, if the auditor picks it, they'll want the supporting documentation showing why it was disposed. Which, if it was sold, would be some kind of sales agreement.

0:16:50.890 --> 0:16:58.140
Karen Baxter
Alright, thank you. Is that going to be out there with these new forms so that people know where to access those?

0:17:1.150 --> 0:17:13.560
Tara Thomason
So the disposal form will be out there, but whatever departments agreeing to sell the equipment would be responsible for that document. I don't know. Am I helping you, Karen?

0:17:15.80 --> 0:17:30.310
Karen Wamhoff
So if there's an agreement, we don't have a standardized form for an agreement for a sale. That would be between the department and the buyer and it would need to be probably approved by the Dean or approved at some level other than just.

0:17:31.170 --> 0:17:32.420
Tara Thomason
And they phoned a friend. Ellen's going to help us.

0:17:32.421 --> 0:17:58.420
Ellen Borowiak
This is Ellen Borowiak. So, I know General Counsel's office has assisted in the past with sort of what that documentation and that contract would look like. I don't think it's often we just rely on the third party, whoever is buying the equipment, to provide their paper. But if that occurred, if you have that situation, I can see if I can dig up that form the general counsel provided and get that updated.

0:17:58.330 --> 0:18:1.450
Karen Baxter
OK. Would it need to go through Agiloft?

0:18:2.100 --> 0:18:3.350
Ellen Borowiak
I think so, yeah.

0:18:4.200 --> 0:18:18.270
Karen Baxter
OK. And I think what you said, Ellen, is that it doesn't happen very often. My concern is that it's happening more than we realize and there's just no documentation or proof that it occurred.

0:18:19.370 --> 0:18:22.700
Ellen Borowiak
I guess I should have said I'm not aware of it happening very often.

0:18:22.420 --> 0:18:24.270
Karen Baxter
I know, I know.

0:18:23.550 --> 0:18:40.570
Ellen Borowiak
But it sounds like there's going to be some more processes in place then. If it's helpful, I can work with whomever to sort of get that contract template, that, you know, added in a link or whatnot to whatever process is developed.

0:18:41.470 --> 0:18:43.220
Karen Baxter
Alright, thank you.

0:18:44.950 --> 0:18:55.490
Tara Thomason
And I failed to mention this: all of this lives out on our Intranet. We're going to put it into PolicyStat. It will be a new policy and PolicyStat, maybe run that by you, Ellen too.

0:18:58.310 --> 0:18:58.680
Ellen Borowiak
Alright.

0:19:3.120 --> 0:19:22.0
Tara Thomason
Any other questions? Otherwise, I'm done. Oh, here's the sample of the new form.
Thank you everyone.

0:19:23.110 --> 0:23:24.309
Andrea Hudgens
Hello, I'm Andrea Hudgens, facilities analyst with facility services. I was debating: my husband's like 'go ahead and say it.' It may be cheesy, but you can think of me as your friendly neighborhood space nerd.

Thank you. Thank you. That's kind of a gamble of: OK, if there's any Marvel fans? I'm here to talk about the facility services university space audit. I know I see some familiar faces. I know, kind of looking at the invite and roster list, I saw familiar names. If you've worked with me before your like uh, Andrea loves space. Yeah, I assure you, I'm not going to talk an hour and a half on space. Although most of you who've worked with me know I can. I basically proxy the facility services space audit. Tammy and Karen talked about audits before and I'm like, OK, there's another audit and it's going to tie in, so perfect timing. One of the questions I frequently get during the space audit is "what is it?" Well, here today, since business managers, I figured the more appropriate question that I'm going to at least introduce or hopefully is relevant to probably what you're thinking is, why should I care? Why should I do space audit if I'm one of your space admins? Or why should my department engage with the space audit? I know it's additional time, additional resources and again like I said, I'm the space nerd. I know probably no one else gets as excited about space as I do. So I have key reasons that I'm going to say that probably bring it into why it matters on your day-to-day or your business operation. First and foremost, we know one of the greatest resources we have here at the university is our personnel. That said, doing the audit helps keep the personnel locations up to date. 2020 Workday program rolled out prior to facility services being approached by HR, the Workday implementation team. Quick background on facility services: I'm sure if you put in a service ticket: i.e. the lights out, the door won't work, need a key, things like that. We manage the facilities for the university and it's going to understatement. It's in our name, but our database, FM Systems, is our central nervous system, if you will. That's where we run the service request. That's where we do reporting. Any of these work capital projects, they run through there. Similarly, all of that, happy to say, is based on space. So, talking, how does it tie into your persons? Well, with Workday, HR needs locations for all personnel. It goes for taxation purposes, any people accounting. One big thing would be any procurement, purchasing, buying. Again, fortunately, I don't have to personally worry about it. I don't have to do the building by process. But if you've had any of your people say I can't move my order forward, it either puts me in an obscure location or it's not going to the location I needed to. Yep, you probably guessed it, or at least I'm going to say it right here: Making sure your persons location is correct in the system. How do you update it? Well, it doesn't get updated in Workday, rather personal locations get updated in FM systems. Now every person who can go into FM, can do their own or one of the things since 2020 that our department has rolled out is access where space administrators can go in, get that 20,000 foot view and say here's where all my people are and they can update those locations. The other thing, and again, I'm going to probably be more biased from a facilities point of view, is mail and routing. So again, going back to buying it, but then also, how do you get it? Person locations need to be current, correct, and one quick asterisk you'll notice though again, I kind of indicate who I see as the target audience or kind of like these keys, but in honesty, I mean everybody at the university benefits from having current and correct spatial data. We can go to the next slide.

0:23:24.310 --> 0:23:54.340
Andrea Hudgens
OK, on here, again, like I said, a little bit biased with facility services, but how is this space actually being used from facilities? We want to know what is the space, is it a conference room? Is it a lecture hall? Is it a laboratory? Is it a student residence area? Basically, knowing how this space is used, and specifically by whom. Which department? Or I guess by whom we can better serve the different requests through the community. One thing that I always say is emergency response. Unfortunately for those of us have been here a minute or two, we can recall there was a fire at Macelwane. When we

have emergency responders knowing what the space is. Again, is it a laboratory that may have chemicals versus the library where there's books and combustibles. Knowing how to guide our emergency responders with accurate "This is how it's used" information can help. Secondly, and I know it's going to my first point up here is if you've ever engaged with facility services for construction, construction services, basically your capital monies, one part of the review that we do is how is your departmental space being used? So keeping it up to date and keeping it maintained well, I'm not going to say expedite the process, but it at least keeps us better informed and we can better serve. Oh, is it a consolidation? Are you expanding? Again, what is your overall space need and how does it match what's going on with your current space?

0:24:35.630 --> 0:24:42.70
Andrea Hudgens
OK. Go to the next slide. Lastly, this is where I was excited, hey, I hear research. So how does the activities use space relate to the universities research? So I have the target group of OVPR, but again, we know that we're embarking on a research focused endeavor for the university for the next what, 5-10 hopefully future years and two of the key things, so this is probably going to go back to when I started with the university, 2010, facility services engaged with research division and well, like I said, we managed the spatial data so we could be better stewards. We pretty much said how can we help research? How can we associate when the two points are functional use codes that they use for facilities and administrative cost reporting? Again, recovery research monies and research efforts. We can basically associate those functional use codes and secondly for any academic type department, if you have research, if you have your PIs, your principal investigators. You're probably familiar again. Fortunately, I don't. I only hear about it when it comes to grant reporting, but grant reporting, to my knowledge, you have to have that association of where are those spaces? What does the PI claim as part of your grant reporting? And I'm sure, especially with capitalized equipment, that that was just mentioned, that's also going to tie. Where does the equipment go? Where is it housed, etcetera? So that's just kind of, in a nutshell, what are the three biggies of? How does it matter in the operations? Currently, we are in the space audit. The deadline for the 2023 audit is March 21st, so less than two weeks. Very, very happy to answer any questions. I have my contact information (link in the PPT) or you can reach out to facilities data management directly (link in the PPT) for information or any questions.

0:26:38.70 --> 0:26:39.960
Sarah Hilgendorf
I have free pens, so please take one on your way out. Yeah, free pens. Hi, everybody. I'm Sarah Hilgendorf. I'm a marketing specialist in the University Central Marcom division, or division of Marketing and Communications. Some of you I know. Others I don't. But many of you might know Laura Geiser, who is my boss. You can go ahead and go to the first slide there.

0:26:59.650 --> 0:30:09.0
Sarah Hilgendorf
So the division of marketing and communications is here to help everybody with their marketing efforts and we were really excited to come and just share a few reminders especially today about the advertising policy at the university. While you might not be the person on your team who is creating or launching advertising campaigns or initiatives for your department, somebody on your team might be coming to you for budget approval, to find out if the resources exist for an initiative they want to do. So

we want to be partnering with you to be able to make sure your team has the information that they need to follow the universities ad policy and also access the support that Marcom provides. So, our team is charged with strategy and implementation of you know, delivering key messages to all of the universities audiences. So, of course, that's perspective students and their families, but that's also alumni, potential donors or current donors, often the community at large regionally and here in Saint Louis. And that goes for the campaigns that we are running specifically out of our division. But we're also here to support the work that all of your teams do. So you may have initiatives that you want to put your own budget and human resources behind, and we're here to support those as well. So just as a reminder, SLU does have a formal advertising policy. It was created in 2008 and revised in 2014 to reflect more of the digital advertising that we're now focusing on as an institution and just kind of the marketing industry at large. You can find that by just putting Saint Louis University advertising policy into a site search on slu.edu or into Google. The URL is up here too. I'm definitely not going to go through that policy line by line today, but I would encourage you, if you haven't read that, to familiarize yourself with that. So questions do come up in your division, you can help us communicate that out to your teams. So it does apply to all forms of paid and free advertising as well as promotional items. So if you're somebody on your team that wants to do a $200.00 print publication ad or a $50,000 marketing campaign, engaging the help of an outside vendor, this policy does apply. So just be aware of that. A couple of key takeaways that I do want to point out to you, one of the key things that a Marcom representative has to see and approve all advertising contracts and purchases across the university. So even if you have somebody in your division that has a marketing title, those contracts still come through MARCOM for that final stamp of approval. And when I say that, the spirit of the policy is really that we get engaged early in that process if strategy and planning because we're going to be able to have the most impact and influence to be able to support your teams through that process versus when a vendor is already engaged in a contract, is already signed. We don't have that same impact. We are kind of rubber stamping at that point and that isn't good for anybody because then we can't bring our expertise to bear through that process.

0:30:10.510 --> 0:30:40.200
Sarah Hilgendorf
We can go to this one, so a few benefits of getting us involved when somebody on your team says, “do we have budget for this marketing initiative?” We're able to as a routine part of what we do every day we review, add contracts. So we're able to look at those and note any red flags about, OK, because of the scope or the platform you want to advertise on or the audience you're advertising to, this is not a fair price. So we're able to kind of coach you through that process and save your division money and you know, larger Big Blue bucket money as well for the university as well. We're able to make vendor and tactical recommendations. So just like in Billiken buy, you can find preferred vendors for the universities, all sorts of things. We have preferred vendors when it comes to marketing tactics, platforms, publications you might advertise in and those that at any given time, SLU might not want to appear on or in when we're talking about publications for a whole host of reasons. So by engaging us early in that process, we're able to kind of help your team find the right fit. So, we're making sure that you're meeting your goals, you're in the place where the audience you're trying to reach is going to see your ads, you're going in a fair price. If you're working with an outside vendor, we're able to steer you towards somebody that someone else at SLU is, whether it's our team or another distributed team, has had a positive experience with and maybe prevent a repeat negative experience to somebody who's had with a vendor on the other side. The last thing up there, avoiding competition between multiple SLU

ads. Just as kind of a reminder from the consumers perspective, whether that's a prospective student, prospective students parents, alumni. When they see multiple SLU ads, whether that's in their social media feed or in their other media habits. They don't make a distinction between this is a Business School ad. This is coming from the Office of Alumni. This is coming from public health or wherever that might be coming from. It's all the Saint Louis University brand. So we need to be sure that what they're seeing is a cohesive brand message. It is really representing that strong visual brand identity of the university that we have a lot of 200 years of brand equity built up but behind that Saint Louis University name. And we want all of your divisions to be able to take advantage of that as well. We have, in our division, kind of that 30,000 foot view of all things marketing at SLU. At any given time, you know what's in the marketplace, so we can help prevent confusion on the part of the consumer and also maybe overlapping ad campaigns that might be spending additional SLU resources to reach the same audience more than once. It's not always the deal breaker, but we want to be aware of it and be able to make your teams aware of it. So if somebody on your team is considering some sort of marketing initiative, your first point of contact can be Laura Geiser. She's in people Finder, she's AVP for brand management for the university. She might not be the person who will be shepherding your team through this process, but she will filter you to the right people within the MARCOM team depending on what your project is.

0:33:57.630 --> 0:34:8.0
Sarah Hilgendorf

So, if you want to go just to the next one. While I've got you, I just wanted to share a few additional marcom resources that are available to all of the divisions that SLU. So if you go to slu.edu/MARCOM, you can find contact information and process information on how to engage any of the teams. So our CMS access team, which is our website team, also handles social media. So if you're division is thinking of starting a new social media account, we want to know that early in the process so we can kind of coach you through whether or not that's a strategic move for your division. Of course we have photo and video guidelines at SLU and we can provide guidance for those projects to our public relations team, which not only handles external media, communications and placement and local or national media, but also the NEWSLINK, internal audience communications, graphic design support, marketing support. We've already talked about. So all of that information can be found on the MARCOM website. So if somebody on your team is looking for support in one of those areas, you can find the right contact via that website. There are also quite a few practical tools and downloads you can take advantage of. So those are listed here. I'm not going to read all of those. But I do want to call special attention to the logos and font downloads. We have had kind of an uptick in departments requesting specialized logos for an initiative or a program. The university has a policy against that. So we do have a process by which you can request a logo lockup for your initiative or division, which is the universities approved fleur de lis shield logo with text that indicates your program or your initiative and that is how you can kind of denote that this is a special thing outside of just the Main St. Louis University brand. You can find all of the current logos in both downloadable versions for print and for web use on the MARCOM website. So, all of that is there. If somebody on your team wants to engage a vendor, work with a graphic designer to create a specialized logo, please know that we cannot use that either on the university website, in university publications. There's a policy against it. So if you can all kind of help us be a line of defense in holding that ground with the Saint Louis University brand and visual identity. We would really appreciate it and it's kind of to the benefit of everybody to keep that one cohesive brand. So I think that that is all I had for you. If there are questions, I'm happy to answer those. Feel free to reach out to me

Sarah.Hilgendorf@SLU.edu, reach out to Laura or anybody on any of the teams within MARCOM. We really do want to be a resource and a support system for all things marketing at the university and we're happy to provide that support whenever we can. So yeah, and free pens, take them as we go.

0:36:48.330 --> 0:36:50.310
Ted Stahl
Good to see some familiar faces here. I'm going to go ahead and do my best to do the driving here. Before I jump in, I'm going to go ahead and try to open separate section of teams. I think I'm going to… What browser are we using right now? Edge. I think I'll run in chrome. Yes. This should be very familiar to everybody, all sorts of stuff. I'll tell you right now, multi factor authentication as much as it might seem like a hassle sometimes. Before we roll this out, I was working with somebody who will remain anonymous. But that person actually had their account hacked. I'm going through the web version. And they actually, after they had hacked his account, they went in and changed his direct deposit information. So if you ever wonder the hassle of going through multi factor authentication. I don't know about you, but I can't afford to miss a paycheck, so it's worth it for that. If for no other reason, it's worth it for that. Teams OK. I'm running a separate instance of teams because I actually don't want to just go through a PowerPoint with you guys. I've got a PowerPoint and that's good, but I want you to kind of see this in action. Jessica and I were speaking about a refresher. I want to make sure that we cover some of what teams is really, really about, so I'm going to toggle back and forth between the PowerPoint and bring you back into ok. There we go. OK, so. Basically, teams can do a whole bunch of things, and most of us know teams as the thing other than zoom that we can do video conferencing in and we might use it for chat. But the actual name of the product teams is where its superpower comes. I I've read comics as a kid, so forgive me, but you know, I'm looking at what this tool does differently and how does it empower me to accomplish things that I want to and I see faces that I've known for years here, many of us have been here decades and we've worked with people outside of our departments, outside of our divisions, and teams allows you to create teams literally of people that aren't necessarily the people you work with every day or might include those people. But it could even include people outside the institution with whom you're collaborating. And the beauty of this, I don't know about you, I'm sure you probably have run them this before somebody shares a document with you, you have to go find it three years later. It was a quote for something that a vendor did or whatever. And you're searching through your e-mail trying to figure out where it was or you put on your hard drive. You don't know where. This is that magic superpower thing that allows you to keep that kind of stuff organized because you can create a team of those collaborating people. You can host files within this. You can have all of your conversations. You can create separate channels within the team that have; think of it like if you have a committee that can be a team and that committee of course is people from all over the place and then the subcommittees can be different channels, different conversations, and not everybody needs to see those if you don't want to, but you can make it so anybody can see those, you can make it so anybody on campus can see it, and in some cases, if you're working collaboratively with other institutions, you can even share it to other people outside the institution. So hopefully, if that hadn't crossed your mind before, you can see a little spark of that might be helpful for something that I'm doing. But the beauty in fact, is not just the collaboration, communication and the conversations that are kept and housed within teams, but the ability to create file structures and folders and subfolders within those teams. So if you have vendor quotes, proposals, if you have specific documents that you've used where you've actually created information about an initiative that you want to refer back to three or four years later, or as some of us have had a chance, like a decade later, saying we did

that once before and we should look at how we accomplished that the last time, we can go to that team and we can open that up. And if it's a committee or something, or if they're different people, we know some of us have outlasted others, others have moved on to other positions, but those committees, you can just remove a member, add a member, so new people that are joining you collaboratively have access to that institutional knowledge, that wealth of information that you've collected that is unique to that particular team. So that's my quick sales pitch that I'm going to go ahead and kind of give you a quick demo on some of this. Some of this, like I said, it's a refresher. So maybe you already know this. You're like yada yada. But whatever. But hopefully I'll touch on at least something that will make you say that could be useful. So that gives you an idea of what we're so and yeah. Basically I'm going to also talk about the file storage aspect of this like I mentioned. Because we're transitioning more and more away from local storage. We don't want people saving things on their own hard drives if at all possible. It's too easy for a hard drive to crash. That data will be lost. We've encourage people for years to use the U and T drive. But there are challenges with that as well, and it's not necessarily secure. Excuse me, secure for certain types of information. We will be covering that too in the presentation as well. So, like I mentioned before, we all know it can be as a zoom substitute if you will. You know you've got the ability to do audio calls, video calls, you have multiple people on those calls. And of course you can use it for chat. That's that, that back over, that's our version. OK. So if you look on the left side here of all the different tools that are available within teams, second one down is chat and then you've got at the top, you can pin anybody that you want to be part of your frequently communicated with people. All you do is go to the far right of some person that you have. The three dots. Click on that and it gives you the option to pin and that person will always be in the top group and then you can drag, you know, the order once you've put them up in that area. So if you've got people that you're always reaching out to. Obviously, if you've spoken with person, chatted with person recently, they will appear toward the top. I was talking to Jessica just earlier this week, so she's of course listed right there, but you've got everybody with whom you've had some form of communication and you go back and you know, we're going back to September at that point. If there's somebody with whom you haven't communicated, that's simple. You just go ahead and click the new chat and then you do a search for the person, bring that person up, and then you go ahead and communicate with them. One of the really useful things here is that you can see a little color dot beside different people, and if you hover over that, it will tell you what's going on, like in this case my colleague Sam is away. In this case, Jennifer, is available. She's great. Now technically, that doesn't mean that she isn't doing something. She is incredibly busy. It just means she's not currently engaged in something that's acknowledged and recognized within the Microsoft suite. So if you have, for example, put in that you're out of the office in your calendar, it'll know that in teams, and it'll say that you're out of the office and it'll know that if you're in a meeting based on what's programmed into your outlook calendar. So it's that cross communication thing that is very useful that makes teams again a collaborative tool to let you quickly know, if no this person might actually be able to respond. They're green right now. So let me chat that person up and see if I can get that information real quick. Usually a chat is maybe less intrusive than a phone call. I'm one of those people that I'm big on being polite, so I won't just call somebody if they're green. I'll go ahead and I'll chat them first and say "are you available for a quick call? If you're not, OK. You know, just wanted to see, and then maybe schedule something after that. The chat is really useful. And I'm sure whether you've been texting or whatever, it's a similar tool that allows you to do these quick communications that could be asynchronous and some people can even do it when they're in the middle of a meeting from their phone. The tool works. Teams can be installed on your phone, and it actually is quite useful to do that. I have disabled the notifications on this because we already would have had like 5 or 6 Dings in here from my phone if this was this was actually enabled to notify me. OK we can deal with that later. So that's chat of course. Like I said, the whole calls thing, whenever you've chosen somebody and go to the upper right, you'll see that you've got that video icon or the phone icon and start with an audio call and then escalate it just by activating your camera. If it turns out that you want to show somebody something physically, Oh my gosh, you wouldn't believe what I picked up. This thing is the most awesome thing. It's so helpful. It looks like this and hold it up to the camera. You don't need to have video enabled in order to do screen sharing. Screen sharing is incredibly useful as well, and it's definitely what I have leveraged historically when trying to do a presentation like this for a whole bunch of people. And we're certainly leveraging it right now for the remote people to see the screen. Hi remote people. Hope you're enjoying the screen. Ohh and of course you know nothing like a good reference to young Frankenstein anyway, so. Back over to creating teams, collaborate. Yep. Said that. And channels within. Yes, so. We talked about chats. Files. Oh yeah, real quick. One of the new things about your chat is that if you share files with somebody during chat and Greg, apologize, but I'm going to go ahead and bring you up here. That's my supervisor sitting in the back. Wave hi to Greg everybody. There we go. So if I knew that I shared something a file with Greg somewhere, you know, last September or something rather than scroll back through all of this and try to figure out where's that file I shared, I can go up to the top. Now, this is a smaller screen. Normally it appears they're right away beside chat, but it's currently compressed so it's hidden, but if you hit four more you see there's files and this is going to show every file that I've shared in our conversation. And you can sort by name or sort by type. I'm going to go ahead and sort by type because what I'm looking for is a PowerPoint file. And there we go. It's the new faculty orientation presentation. The PowerPoint from 2022. Bam, that is so much easier than scrolling back through to find that back in September or October of last year. So, whoever changed that aspect of files that have been shared back and forth, incredibly useful and it's that kind of stuff where the teams themselves become really, really a godsend. Like I said, that's superpower that's involved with that.

0:49:43.130 --> 0:50:7.890
Ted Stahl
Audio and video calls, yet we talked about that the little camera versus the audio phone. Of course, recording sessions like we're doing on this one right now, very useful to refer back to. We have an incredible amount of storage. So, we don't have to worry about those disappearing like we do with zoom. Zoom recording the same thing, but it's expires 90 days or something. So you want to make sure that if you record something in zoom that you offload that, maybe hosted in Panopto if you're going to need it later on. You don't have to worry about that from the team side and of course transcripts. Transcripts are incredibly useful, like there is a transcript of what I'm saying right now and what everyone has said so far because we recorded this, it's built into that teams recording. So when you look at it later, you can go ahead and say I knew somewhere in here and that can be a lot easier to go through and review then trying to scroll through the video. If you know the content that you're looking for, and if you want to quote somebody and then call them out and say, look, you set this up so, but again incredibly helpful and useful, especially also if you have people that are hearing impaired and at that point they'd be able to actually see much more recently what's going on. I would say it's about 95 to 98% accurate not including jargon. So for example Med school when they start spouting Latin things, it can get a little hairy sometimes. But it's getting better and better with that, so the transcript option is something that I don't think people highlight as much, but I think it's incredibly useful. So making a team, that's the fun part. If we come over here, again, our tools that we have on the side in teams,

there's something called teams. If you go up to the upper right corner, it says join or create a team. We click on that. There's an option to create a team. Now if you want to create a team just to play around with it, do it. It's easy. It's not a problem. When you're done with it, you can delete it. You're not going to break anything. So play around with it and see what you can do and enjoy yourself. It's fun stuff. I just do it Saturday night, nothing to do. I think, I'm just going to make a team! Everybody's like Ted, Ted, stop inviting me. It's 10:00 o'clock on a Saturday night. I don't want to be on your team. Oh, it's a board game team. Anyway, creating a team, you click on that. We obviously have an excellent learning management tool using canvas, so we're not really you leveraging this for classes, but there's something institutions that do. What you're probably looking for is staff. And at that point you just type in the name. I'm going to type in the classic delete me redirect because I'm not going to keep this team and I want to make sure that I know that this is the one that I want to delete. Once you have a name on that, you can put a description if you want people who discover exactly what it is. And then you've got your privacy settings like only team members can add members And then you've got public. Anyone in your organization can join. Like it's a committee and you want to keep it locked down to the people that are involved in that. Probably want to keep it only team owners can add members and at that point, you know exactly who's on the team. You can add people. You can take people away. You can make multiple owners, which is very important. So if you and you've got like two other colleagues that you all want to be owners, that all have the ability to manage the team. So if you're going to be out of the office for a week or two and somebody else needs to go ahead and update some information, share whatever you know, it's like, sorry, that person not here, can't do anything about that. Always great to have a backup or if you win the lottery and it's like, see you. You know, you want to make sure somebody else has the ability to take over the range of that particular team. So we say privately that like that. I'm going to say dismiss that, OK. At that point, let's see, it gives you option for a template. Or something from the university will just go ahead and leave it as is, and then it's going to ask you, who do you want to join your team. And I saw that Delia was here. So, Delia. And of course, knowing that. It's pulling all of our information for our site. It auto populates CC. The person that you're probably trying to add to that as you start typing their name and you hit add that person that actually are going to be part of the team. And at that point, if I wanted to escalate her to be an owner, I can go ahead and do it. Really complicated stuff. But Bam, there you go. Now she has full ownership rights in that team. You can go ahead and add more people and you can add and subtract people later on. No trouble at all. This is my delete me later team. I'm going to go ahead and back up and if you Scroll down for all the teams there, it is right there. You can go ahead and say ohh I want it to appear up there. OK, so it's there. I can come back to those three dots. I can manage the team. I can go ahead and say, you know, the team. I want to go ahead and add people. I can go ahead and add members at any point. Just add more people to it.
So that as far as the ability to generate, that's literally creating a Team. The team has been created.
Now in addition to that, you can have a channel. Let's say that this is a committee that we've got. Well like I said before, you've got the ability to upload files here. Again this would appear if we're running a 16 by 9 screen, but we're on a four by three. So it's actually compressing this, but you've got members, apps and then under more your thinking why we're not seeing what I was looking for. Oh, sorry, general. OK, files. And this is where you would put files for your team. You can go ahead and put other channels here. Like I said, maybe different subcommittees, different initiatives, and each of those can have their own file sections, and each of those files sections can have their own folder structures. So you say new, you can go and create a folder. I'm just going to say vendor quotes. So, at that point, that's what that is. And then you go under that and you may break it down by year. You could break it down by specific

initiatives that you've had, whatever. But the fact is two or three years down the road, you can go back, you know exactly where to find that and you've got all the information right there. You're not coming through all those emails or trying to look in your address for that stuff. And the conversations that you have under posts, the comments look at that, Delia said hi. Hi, Delia. So the conversations that you had would be recorded there as well. And since it's, you know in this kind of interface, you can go ahead and do a find command and try to find a reference to something back in your history so. That, in a hyper quick nutshell, is the concept of teams and that organization and that superpower of collecting that information and being able to cross communicate and collaborate with that tool. Yeah, that's what we did: making a channel. Yep.

0:57:17.570 --> 0:57:37.740
Ted Stahl
OK, now this is kind of the big thing that I wanted to talk about in file hosting. As I mentioned before, we kind of trying to get away from using the T and U drive. We certainly don't want to save things on the hard drive because they're vulnerable. How many of us at least work a day or two remotely? I am. I do. The fact that the t and u drive has always been somewhat problematic to access from home, that's well known, well documented. So, working with the cloud obviously makes that a lot easier. A lot of us have been around long enough to have used Google for stuff like that: Google Drive. We have a BA in place with Microsoft that allows us to store anything up there. I am not just talking about, you know, personal things. I'm talking patient data. We are legally allowed to put patient data because it is encrypted, protected and they will use their lawyers if something comes up. It's not saying Saint Louis Universities fault. Our agreement says we can put anything in that cloud. It's the only place that we can store anything. So if for no other reason. You don't have to worry. Can I put this here? Because that's not a conversation for all sorts of researchers. For clinicians over the years that we don't want to do something wrong and we certainly don't want to do something that would violate the trust of our patients or our colleagues or anyone. So that's a huge benefit to know that it is safe and that our agreement allows us to do that. You know about OneDrive; SharePoint is essentially the saving SharePoint literally is anything that you saved through Microsoft. If you get a OneDrive link, it says SharePoint in it. It is their cloud. But technically we refer to SharePoint as the stuff that goes through teams, whereas OneDrive is the stuff that you're personally saving. Now you save that in. We think of the OneDrive kind of as your u drive. And then SharePoint as your t drive. Anything that you're going to collaborate with, you're going to put in the team that you're sharing stuff with. You may create a team that's literally just a basic departmental team, and that's where you're going to be putting all your files from now on and where you communicate with your people. That's what my boss does. That's what a lot of the people within its do. We've already migrated to that kind of construct. But The thing is, in addition to that, there's so many other things that you can leverage them. But the file hosting can all be done straight through that, and then unlike certain things, you can easily open those files live, work with them, and everybody's seeing the same thing that's happening on that shared drive, those shared files. You can share anything on your OneDrive. You can choose who it's going to go to and whatever, but it's not by default, intended as a shared thing. It's meant to be what you're working on. Your personal stuff. Like I said, think of it as your u drive. And to clarify, you're going to be sharing a PDF of this with everybody. So for those of you that are taking screen captures and photos, you don't have to worry about that. You'll get that. And I've got links later in here that will be active through the PDFs. So, you've got a bonus there.

1:0:58.470 --> 1:1:8.60

Ted Stahl
The next two slides are particularly important for the for the storage we're talking about. Like I said, T drive is internal capable. You can't access it publicly. You can't. You can't share it with people or whatever. Same and you're not supposed to put anything confidential or anything restricted there. You can put more stuff on Google Drive. You can access it publicly to share it with other people and you technically can put confidential content, but you can't put restricted stuff. You can put restricted on OneDrive for business and the team SharePoint. So those tools, like I said, we can put anything there. This next slide is the golden slide. This actually shows you what is defined by public, internal, confidential, and restricted use data. And anything up there can actually be shared in Microsoft because of our agreement with them. So Social Security numbers, FERPA data, patient data. Anything can go up there and legally we're not in trouble and Microsoft doesn't want to be in trouble either, so they definitely have everything in place to properly protect that, so nobody gets in trouble. So it's good to have that kind of agreement with them. And they understand at that level what that agreement means. So, you'll be able to refer back to this because it's included within this documentation. How are we doing on time? Ok. As far as saving to OneDrive and SharePoint, they're different ways you can do it. Obviously if you're in teams, you can go ahead and just go to the files section and you can hit upload. And then you can grab files. Pick whatever file you can hit an entire folder, select a folder and then I'll upload the folder and everything within it. There are other ways that you can actually do that. If we were to go ahead. That's weird. We're not here. I'm going to run as many applications at the same time. Woohoo. Sorry.Uh. Wait, can you tell I'm in IT? OK, well, go ahead and open up. I'm just accepting this. It's on your behalf. You're logged in. OK, so. It's like, sure, whatever. From here, if you go up to save or save as. You will notice up at the top we can save directly into our OneDrive account. Jessica's OneDrive account. Let's fill it up with a bunch of garbage. No, I'm just kidding. Or you can save it to sites and if you go to sites, that's essentially that's teams. So she's got a workday collaboration and budget. We're not going to look into those things because that's your person. So, but OneDrive, you've got all these different folders that you can work with within that. You can create new folders, you can create folders under folders, but you can actually save your content directly into the cloud. You don't have to save it locally and then upload it separately. And then of course, when you open stuff from that, it automatically is if it opens into the application, it's in an auto save function, which is awesome. I mean, I don't know about you, but I've lost stuff. I don't like losing stuff. I mean, I've done things enough. I don't need to do a multiple times. You know, if you do something once, once is enough. But to be able to save something to cloud and then it automatically goes into other save after you've saved it and then you just keep typing and working on it. If somebody distracts you and your computer crashes. It was all saved. It's a godsend. And of course you know, Google gets credit for having done that first. So I give credit where credit is due. They, they, they did that really well. My kid, Oh, God bless him. He used Google in his primary year's: one through 8. His first year in high school, they moved to Microsoft, but they weren't using the cloud, and he wrote a paper in Word and then he turned off the computer. He had never saved in his entire life, and his paper was gone. So yeah, I had to be the IT consultant that had to tell him it's lost son. That was a. That was a fun time. And that was a long night because I stayed up with him to rewrite the paper. But we don't have to worry about that with the cloud. We go ahead and save it once into the cloud and then it just auto saves and we don't worry about it.

1:5:37.90 --> 1:5:37.10
Ted Stahl
So yeah, how to save OneDrive and SharePoint? Yep.

1:5:42.530 --> 1:5:44.230
Ted Stahl
Ohh, scheduling meetings in Outlook. If we jump back over to…I was here. Right? Oh no. That was weird. Too many applications open. There we go. So, from here, if I go back. So, here's outlook. If I go to Calendar. I want to go ahead and schedule something later today. I click on that meeting. And I want, as soon as I add somebody to this meeting, I want to put my bosses boss, no put my boss. So, he was like oh, you're putting another thing. As soon as I add somebody to this down here appears this little thing that says teams meeting and there's a toggle and I just click on that toggle and then when I save that this isn't a real meeting, Greg. I hope you know that. I'll delete it.   But you hit send and that meeting has appeared there and now if you clicked on that meeting, you will notice that it gives you the option to join. Pretty cool. Question?

1:06:53 --> 1:7:3.909
Krista Weik
Yeah. So I have noticed with that, that's just the link. Is there a way to get a phone in number like Zoom had?

1:7:3.910 --> 1:7.3.912
Ted Stahl
That's an awesome question.

1:7:3.913 --> 1:7:3.914
Krista Weik
So like if somebody's working from the car or somebody wants to join the meeting, they can do that.

1:7:3.915 --> 1:7:3.916
Ted Stahl
With that, if they have teams installed on their phone.

1:7:3.917 --> 1:7:8.870
Krista Weik
They don't.

1:7:9.917 --> 1:7:9.870
Ted Stahl
Then they should get it installed on their phone because I cannot tell you how many times that a meeting has been put on my calendar before I'm in the office and it connects Bluetooth to the car and it's running teams there and it actually the interface changes because it recognizes that you're in a vehicle and connected via Bluetooth and it's a very simple interface and it tries not to be distracting with big buttons so I cannot recommend that enough.   As far as the phones, let me… Follow up with me after. Did you have a point?

1:7:9.880 --> 1:7:10.59

Mary Lynn Thompson
No. I was going to ask a question.

1:7:52.0 --> 1:8:6.940
Ted Stahl
Oh, another question. Follow up with me immediately after, I'll get your information and I will follow up. Because I believe there's something in there. I just have never used it. But I want to follow up with you on that. Another question.

1:8:06.0 --> 1.8.7.75
Mary Lynn Thomson
Can you send instructions on how to get it on your phone? Teams.

1:8:7.760 --> 1:8:19.390
Ted Stahl
Yeah, actually, that's a great question. I may have a knowledge base article already and if I do, I can just send that. Should I provide that to you and then you'll share it with everybody. Is that the best way to do it?

1:8:19.710 --> 1:8:22.340
Jessica Winet-Fleer
That's fine.

1:8:23.140 --> 1:8:41.780
Ted Stahl
OK, cool. Excellent. Then, that way I don't have to get everybody's e-mail necessarily and that way if somebody else later on says Ohh I need that help. If for some reason I don't have a knowledge base article written for that, I'm the one who writes those, so I'll write it. It may take a little longer, but I'll definitely. Its an excellent idea and a good point.

1:8:42 --> 1:8:43.69
Janet Strader
Ted. We're down to about 5 minutes. We got one more presenter after you.

1:8:43.70 --> 1:8:47.700
Ted Stahl
OK. Then I probably that was the important stuff. Let me just go ahead and see. Yep, this page includes links, like I said, so when Jessica shares the PDF here. The top one here that says Workday learning, this actually is the full hour version of this where I pontificate ridiculously on all sorts of stuff, but you can actually watch the video there. And there are other resources that are available there. In addition to that, we have two articles in the knowledge base. These are links to those and those have links to additional support for teams, including links and work day for training on the top one and links directly to Microsoft for training on the other one. That's it.

1:9:34.290 --> 1:9:36.860
Ted Stahl
Yes, go ahead and close out of that. How can machine have too much? Thank you.

1:9:53.330 --> 1:9:54.800
Jeff Hovey
Thank you. Hopefully relatively quick here. What time are done here? 10:15 or 10:30? 10:30. OK. I won't use 19 minutes, I promise. Good morning. I'm going to take just a few minutes to talk about the copier program. And of course I have to reference the 1:00 o'clock game today. So go bills! Against George Mason there. If you were around 9-10 years ago, you remember we went through that big what we called management services change. And at the time that we started that, we did an assessment. This was back in 2013, late 2013. But we did an assessment of how much equipment, copier and printer equipment do we have around campus because we think there's a lot of waste out there and it turns out that we had about 3300 copiers and printers in 2013 when we did the assessment. We said, OK, we can we can have a better program than that. We entered a managed print contract with Xerox back in early 2014. So we've been under that contract now for a little over 9 years. But we took it from about 3300 copiers and printers down to about 1000 for everything. That includes SLUCare research, everywhere. So, we had a 2/3 reduction in our fleet. And we put it under what we call it a cost per click program and we'll talk about that in a little bit. But now we've been under this nine years, we're reaching the end of life with our Xerox contract and as many of you know, the stuff that you have is, is, is old, it's eight years old or more. There's been some stuff that's been changed out. So not everything, but in general our stuff is old. It needs to be replaced and what's important there is, you know, it's never, you know, a fun process necessarily, to have to see all of your copier and printers come out and have new stuff in and, you know, having to learn that new equipment. But I think a point that's important here is, even if we had stayed with Xerox, we would still have to replace our whole fleet because it was just old. So this was going to happen one way or the other. I mentioned that there. So, last year as SLUCare was winding down, we took the SLUCare volume off the contract and then we issued an RFP to five copier companies and we'll get to that RFP in just a minute here.

1:12:21.940 --> 1:12:30.710
Jeff Hovey
So this is gives you an idea of the bottom that we had prior to the pandemic. So, we were doing about 34 million copies a year when you combine our black & white and color. In FY19, you see it was pretty consistent, about 34 million again. Then COVID hit and our numbers dropped drastically. I didn't even put FY20 and 21 up here because the numbers were so low. Everybody was mostly off campus at that time. But then as we started to ramp back up, come back on campus, our black & white and color, we were just under 20 million for this most recent fiscal year.

1:13:6.300 --> 1:13:15.60
Jeff Hovey
Then, next slide, if you factor in the SLUCare transition, even though SLUCare had about 300 copiers and printers out of our thousand. They actually represented almost 50% of our volume because medical entities tend to do a lot of printing. So what's happening is because our volume is now down to 1/3 of what it was four or five years ago, a cost per click program is not the cost effective way to go anymore. So we're going to enter into a university lease program with a new provider. Xerox and the other vendors vetted it both ways and we'll get into some of those specifics here in just a minute.

1:13:52.240 --> 1:14:16.340
Jeff Hovey
Let's go ahead and go to the next slide. I'll talk about that. So here are the vendors, the suppliers that we bid this out to last year: to Xerox, to Marco. Each of these have corporate and higher Ed experience. Marco, SumnerOne, which if you remember if you were here 10 years ago, some of us, some of our divisions had leases with the company called Copying Concepts. So that that SumnerOne is Copying Concepts. It's just under a new name now. They kind of took their parent name. We bid it out to Canon. We bid it out to IDEX. I want to thank Andrew (Chism) for a lot of his work on the RFP and doing a lot of the legwork on this. But after we reviewed it and we asked the vendors, we said we want you to bid this here's our volume going forward. Bid it as a per click and bid it as a lease and let's do an evaluation. So at the end of the day, because our volume was now going to be down to closer to 11 million or so annually, the per click rate was just too expensive, so next slide.

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Jeff Hovey
So we did choose SumnerOne. They had the best overall proposal. They offered us the lowest lease rate, monthly lease rate. They do the underwriting on their own equipment. So, the benefit to that is, you know, if you've worked with leases, equipment leases in the past, oftentimes the distributor has an agreement with the manufacturer, like GE or someone like that, and you end up working with these third party leases and there's all kinds of sometimes challenges. They underwrite their own equipment. So if there's problems on the back end that they have with a manufacturer, they deal with that. So, they underwrite their equipment. So that's a good thing for us. Our prior history with Copying Concepts and Data Max, what they were known at the time. They did have good strong customer support that those of you that remember them, that that was something they were strong in and then they are a locally owned business, they're right near Manchester and Hampton, you make a right on Manchester, they're just a maybe about 1/2 a month down at that intersection. So, they're not far from campus at all.

1:16:5.690 --> 1:17:57
Jeff Hovey
Next slide. So, what's going to happen next? So, we put together a questionnaire that we're going to send out next Monday, and the questionnaire is going to just help us gather some information on where? What's, what's out there right now, the current state. And then once we get that questionnaire compiled by area, we're going to send that over to SumnerOne and then they'll develop kind of a recommendation for each area. And we ask that you return the questionnaire back to us by March 31st. We hope to have umm, you know the contr… we're working through the contract now with SumnerOne. We hope by the end of the month, we should have it finalized just some language that we're working through. And then once SumnerOne has prepared that recommendation for your area, they'll actually come out and meet with you and go over like, OK, you have a 7855 and a 50 and 55 now. We recommend this. And then here's the cost associated with that. Here's your lease cost that you can see. So, we'll coordinate those meetings. And then once you've had a chance to review it and vet it to whoever you need to like within your areas and have given approval, then the order will be placed. And then we'll schedule the installation of the new stuff and remove the old. In the meantime, you know this, so we'll have probably six, 650 devices that will have to eventually get other Xerox stuff that will get moved off campus and bring in the KiaSera. KiaSera is the new name of the manufacturer we will be using. But project itself is a many many months project.

1:17:58.260 --> 1:19:20
Jeff Hovey
So go to the next slide.   We've tried to and this again is a ballpark of that estimate up here, but we want to start right after school. We want to do a part of Wool first, over in our building. Kind of the test pilot it there. And then once we've kind of learned some few processes there, we want to get out to the North campus schools and colleges right away, right after commencements over is our is our goal. And then get through as many of the colleges and schools on the North campus as we can over the summer. I don't know. You know, by the end of July how far we'll get into that, we just we have to see how the cadence goes. But then if we if we can get through most of that, then ideally, in August, we would move to School of Medicine and research areas. Then eventually get to the remaining admin areas in the law school in phase three. But I will say, this is a this is kind of a floating target right now, because you know when we did this Years ago, in 2013 and 14, it took longer just because there was a lot more involved, a lot of equipment being removed. And so we hope that we can get this done in eight to nine months, but it may take a little bit longer than that, but we'll see. So that's pretty much where things stand right now. Questions on that this? Delia?

1:19:21 -->1:19:24
Delia King
Who are questionnaires going out to? Just business managers or key device contacts?

1:19:25 --> 1:19:55.25
Jeff Hovey
Yeah, good question. So, I'm actually working through that right now. I've been contacting a lot of divisions to ask who do you want to receive this and so I'm kind of building that list and then I'll be sending that out by end of day tomorrow. I hoped it pretty much be there. So OK, other questions? good questions. Alright. Good deal. Well, thank you, everybody. All right. Thank you.

1:19:55.260 --> 1:20:01
Jessica Winet-Fleer
Do we have any other questions before we conclude? Do we have anything in chat? OK, thank you all for your time.