



TOWN HALL

August 7, 2024

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BUCKEYE OLYMPIANS
PARIS 2024

Town Hall Agenda

I	Welcome & Updates	Mike Papadakis
II	DEI Committee Update	Kai Peters
III	Wellness Committee Update	Kelly Des Roches
IV	Wellness Presentation	Stefanie Morrow
V	B&F Staff Appreciation & <i>ShoutOuts</i>	B&F Leadership
VI	Announcements & Final Remarks	Mike Papadakis



Updates & News

- Congratulations Team Buckeye – B&F Rollers
- B&F Lunch & Learns [Archived Presentations & Recordings](#)
- September Sessions Survey Deadlines *(event formerly known as Summer Sessions)*

UNIT AREA	SURVEY LINK
Accounts Payable, Service Centers/OpEx, Controller, Investments, FP&A, Internal Audit and Bursar	Survey August 12 Deadline
Risk, OFS, Treasury and Energy Management	Survey August 19 Deadline
Payroll, PRSM/Central Receiving, Purchasing	Survey August 26 Deadline

- Board of Trustees Finance & Investment Committee Meeting
 - Next Meeting: August 22, 2024
 - Annual Financial Overview, FY25 OSEP & Capital Investment Plan

FY25 Financial Plan



THE OHIO STATE UNIVERSITY

FY2025 Financial Plan

Office of Business and Finance
Financial Planning and Analysis

Plan Highlights:

- Plan builds on the university's strengths and provides an operating margin to be reinvested into strategic initiatives and capital projects at the university.
- The consolidated FY25 budget projects:
 - \$10.4B in revenues
 - \$9.9B in spending
- The university achieved a new institutional record of almost \$1.45B in research and development expenditures last year.
- We expect to distribute a total of \$486.5M of financial aid, excluding graduate fee authorizations, to students in FY25.

[LINK TO REPORT](#)

Pelotonia 2024

16th Annual Ride Weekend Event: Thanks for a great ride!

- Saturday, August 2nd & Sunday August 3rd
- 6,844 Total Riders (as of 8/1)
- Routes ranging from 20 to 190+ mile

B&F Rollers 2024 Peloton:

- 31 Peloton Members
 - 15 Riders
 - 7 Challengers
 - 8 Volunteers
- Fundraising Progress: \$61,158 (as of 8/1)

2nd Annual Gravel Day Event:

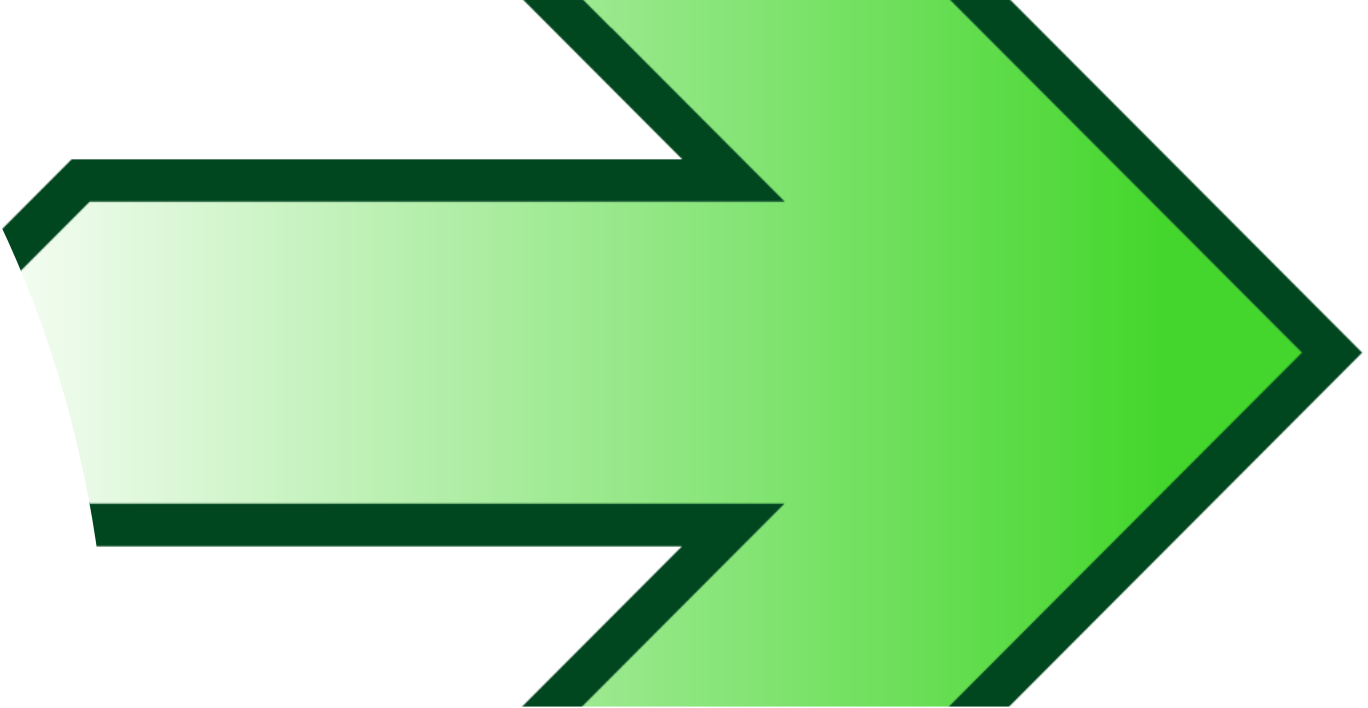
- Saturday, September 21st – still time to register
- Routes ranging from 22 to 52 miles
- Camp sites available \$25 per night (Friday & Saturday)
- Camping equipment rentals available

Captain: Jake Wozniak Wozniak.20@osu.edu
Administrator: Erin Barniak Barniak.1@osu.edu



B&F Rollers 2024 Participants

Name	Participation	Name	Participation
Bill Alexander	Rider	Colin Moore	Volunteer
<u>Erin Barniak (Admin.)</u>	Rider, Volunteer	Tony Newland	Challenger
Larissa Batche	Volunteer	Michael Papadakis	Rider
Mark Benotti	Rider	Teri Parsell	Rider
Anita Bratcher	Volunteer	Scott Potter	Challenger
Brian Conway	Rider	Lisa Poturalski	Rider
Erica Conway	Rider	Keira Rife	Volunteer
Thomas Ewing	Challenger	Jim Roberts	Rider
Kyle Gephart	Volunteer	Kelly Roches	Challenger
Frank Grubb	Challenger	Adam Sharp	Challenger
David Hanks	Rider	David Tiggett	Rider
Steve Hronek	Rider	Jeff Ulrich	Rider
Eugene Killeen	Rider	Sean Whalen	Challenger
Amy McMahon	Volunteer	<u>Jake Wozniak (Captain)</u>	Rider
Rob Messinger	Rider	Megan Wozniak	Volunteer
Matthew Moore	Volunteer		





DEI Committee Updates

Kai Peters, Senior Commodity Manager

DEI Committee – FY24 Accomplishments

- **Internship Program:** All B&F units have plans for at least one intern from Summer 2024 through Spring 2025.
 - Expanded partnership with B&F leadership and Office of Human Resources (OHR) Business Partners to create sustainable processes to drive the Internship program.
- **Training & Development:** Maintained DEI Guide through reviews of links and updated content.
 - Provided several optional DEI training options and encouraged staff to explore topics that were of interest.
- **Supplier Diversity:** Became formal sponsors of the Ohio Minority Supplier Development Council and Women Business Enterprise Council – Ohio River Valley.
 - Met quarterly with colleges/units that volunteered to participate in Supplier Diversity spending goals
 - Administration and Planning/ FDC
 - Business and Finance
 - Student Life
 - Dining Services
 - OTDI (Office of Technology Digital Innovation)

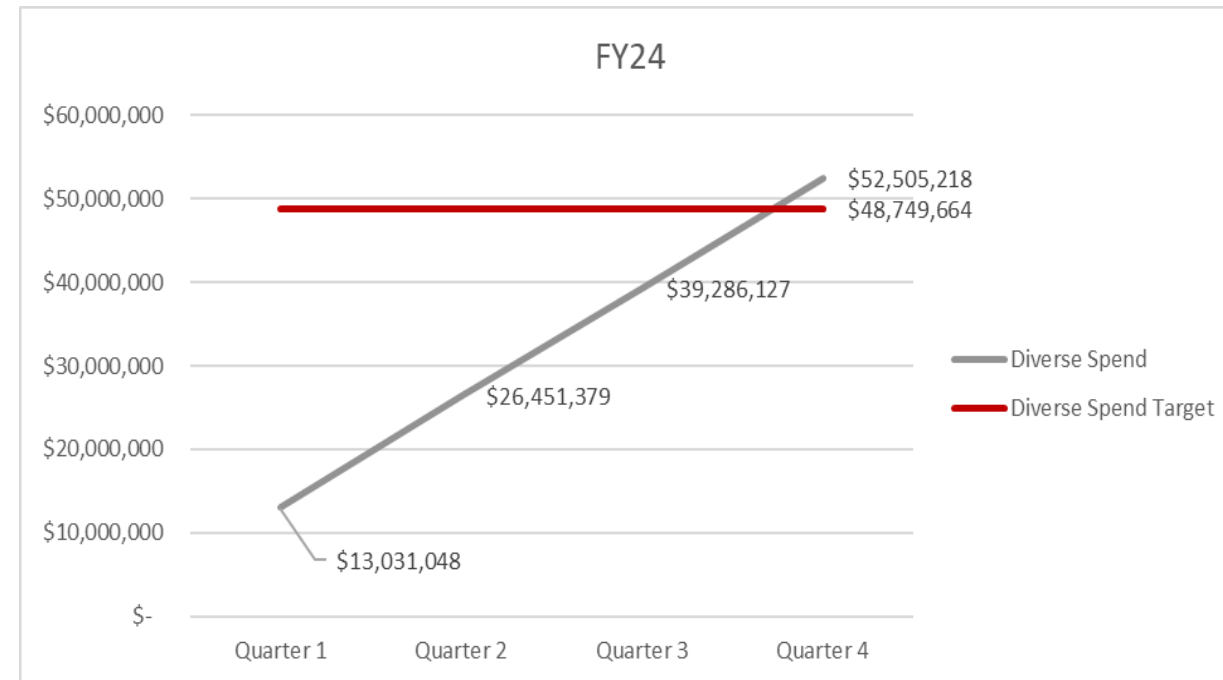
Supplier Diversity Update

■ FY24:

- Spending with Diverse-owned Companies target: **\$48M**
- Spending with Diverse-owned Companies achieved: **\$52M**
- Two new sponsorships established with Minority and Women-owned business councils

■ FY25:

- Spending with Diverse-owned Companies target: **\$42M**
 - Construction is significantly lower than previous years impacts the target
 - Construction is less than 20% of total spend but 50% of Diverse-business spend
- Establish a new sponsorship with Vet-Ohio



DEI Committee FY25 Goals

GROWTH & INCLUSION GOAL: Foster an inclusive and equitable culture within the Office of Business and Finance by prioritizing staff engagement, individual growth and enabling positive staff-directed change.

- Coordinate with B&F leadership to expand staff engagement through *September Sessions*, new employee feedback sessions and other events that engage B&F staff.
- Evaluate surveys and determine opportunities to continuously improve staff engagement.
- Coordinate with B&F leadership and HR Business partners to continue the growth of the B&F internship program.

BUSINESS DIVERSITY GOAL: To increase the awareness and usage of diverse businesses throughout the university by providing spend data to assist areas in setting attainable and achievable goals.

- Work with identified units/colleges, that established spend targets, by providing information, quarterly progress checks and communications on progress toward achieved goals.
- Continue to grow sponsorship and engagement with Ohio Minority Supplier Development Council, Women Business Enterprise Council-Ohio River Valley, Ohio Vet Expo, and other groups as identified.

2024 DEI Committee Members

Jasmine Anderson	Associate Director	Bursar
Wayne Cartwright	Commodity Manager	Purchasing Administration
Vella Garrett	Business Continuity Manager	Risk Management
Alexandria Goolsby	AP Interim Manager	Accounts Payable
Monique Lumpkin	Financial Services Special	Bursar
Teri Parsell	Manager	Payroll Accounting
Garrett Patterson	Debt Management Senior Analyst	Treasury
Kai Peters	Senior Commodity Manager	Purchasing
Renee Schlade	Director of Investment Operations	Investments
Tracy Shrimplin	Sourcing Analyst	Purchasing
John Snedeker	Audit Manager	Internal Audit
Mindy Swanner	Technology Training Developer	Financial Training



Wellness Committee Updates

Kelly Des Roches

Wellness Committee – FY24 Accomplishments

GOAL 1 -- Improve Mental Health & Wellbeing

Provide education, resources, and activities in support of staff and their overall mental health and wellbeing.

- ✓ **The Wellness Committee sponsored a two-part Lunch & Learn on Mindful Communication and Connection.**
 - Part One: Mindful Communication and Connection with Self (Jan. 11, 2024) (60 attendees)
 - Part Two: Mindful Communication and Connection with Others (Feb. 15, 2024) (80 attendees)

- ✓ **The Wellness Committee sponsored two speakers at each B&F town Hall this fiscal year:**
 1. Office of the Chief Wellness Officer (August 2023) presented the 10 dimensions of wellness. Discussed the University's Health and Wellness Strategic Plan goals and reviewed our B&F specific wellness results identifying areas of opportunity to improve wellness.
 2. The OSU Health Plan (August 24) presented Managing Stress and Creating Resilience which focused on self-care. Reviewed the YP4H Incentive Programs, employee wellness benefits and upcoming wellness activities.

GOAL 2 -- Increase Physical Activity

Provide education, resources, and activities in support of staff increasing their daily physical activity.

- ✓ The Wellness Committee planned and held the inaugural B&F Wellness Committee FitFest, on May 1st at the OSU Recreation and Physical Activity Center. Many activities were offered including pickleball, Zumba, Yoga, cornhole ping-pong, Resistance Band demonstrations, a walking track, and a volleyball tournament. 140 staff members in attendance.

Wellness Committee FY25 Goal

The Wellness Committee goal for FY25 will center around the Ten Dimensions of Well-Being.

The Committee will coordinate activities, events and educational opportunities encompassing a holistic approach by incorporating as many of the ten dimensions as appropriate.



2024 Wellness Committee Members

Erin Barniak	Office of Financial Services
Karina Brown	B&F Administration
Kelly Des Roches	B&F Administration
Jan Giangardella	Procurement Shared Service Center
Frank Grubb	Procurement Shared Service Center
Steven Hronek	Purchasing
Christopher Illes	Office of Financial Services
Shikera Kennedy	Stores and Receiving
Ruth McCollum	Controller
Teri Parsell	Payroll
Terry Rodeman	Risk Management
Renee Schlade	Investments
Katie Seay	Controller
Mindy Swanner	Financial Training
Erica Thompson	Bursar
Faye Wintering	Internal Audit
Gloria Wood	Operations Administration



Wellness Presentation

Stefanie Morrow, RN
Director, Wellness & Health Coaching



2024 YP4H Incentive Program

Activity	Incentive	Amount for Enrolled Faculty/Staff and Spouse	Amount for Faculty/Staff Not Enrolled*
Complete PHA and Biometric Health Screening	Premium Credit	Employee: \$25/month Spouse: \$15/month	N/A
Level 1 (2,500)	Quarterly Reward	\$10 HRA	\$5 PulseCash
Level 2 (5,000)	Quarterly Reward	\$20 HRA	\$5 PulseCash
Level 3 (10,000)	Quarterly Reward	\$30 HRA	\$5 PulseCash
Level 4 (25,000)	Quarterly Reward	\$40 HRA	\$10 PulseCash
Complete 2 qualifying activities	Bonus	\$100 HRA	\$20 PulseCash

**Must be eligible for medical benefits*

Please Note: The rewards you earn are dependent upon your medical benefit enrollment status reflected in the YP4H portal at the time you reach each incentive level.





2024 YP4H Bonus Activities

Complete 2 Qualifying Activities For The Bonus Reward

My Care Checklist

- Keep up with preventive care by receiving friendly reminders that let you know when you're due to see your healthcare provider.
 - *Activity for bonus:* Complete 3 preventive activities in the My Care Checklist | [learn more](#)

RethinkCare

- Enjoy on-demand access to nearly 1,500 mini-courses with audio and video sessions, tips, articles, and exercises that will enable you to build easy-to-learn skills.
 - *Activity for bonus:* Complete 1 RethinkCare session per week for 16 weeks | [learn more](#)

VP Transform

- A free year-long program that offers weekly education and accountability to help meet people where they are and support lowering their risk for developing chronic disease. Must meet certain qualifications to be eligible to participate.
 - *Activity for bonus:* Complete 9 VP Transform consecutive weeks of active engagement | [learn more](#)
 - Must complete at least 2 of the following activities each week: lesson with quiz, connect with coach, group chat, food log, or weigh in.



Upcoming Health Habit Challenge Themes

Plan Ahead To Participate Each Month

- Q3
 - July → Every Day Is Earth Day - COMPLETED
 - August → Bit Of Everything
 - September → Get Outside & Move
- Q4
 - October → Stress Less
 - November → Practice Gratitude
 - December → Stay Connected



Other Wellness Benefits

Lifestyle Spending Account (LSA)

Funded by the university, this personalized benefit provides eligible employees flexibility to pay for a variety of eligible expenses that support overall well-being. A quarterly contribution of \$125 will be allocated to eligible employees on January 1, April 1, July 1, and October 1 to be used during that quarter. No enrollment is needed to receive the funds or participate in the LSA. Sample expenses that can be reimbursed, but are not limited to:

HEALTH AND FITNESS

- Gym memberships and equipment
- Produce buy club / CSA
- Athletic apparel and shoes
- Race registration fees

EMOTIONAL WELLNESS

- Books
- Massage services not prescribed by a doctor
- Meditation or mindfulness classes
- Sleep products, like blackout curtains and lumbar pillows

HOME, WORK AND FAMILY

- Child's jogging stroller
- Shut-off avoidance utility payment
- Credit counseling
- Emergency car repair (not fuel or routine maintenance)

SOCIAL AND PERSONAL

- Club Memberships (e.g., Faculty Club)
- Botanical garden, museum, zoo membership
- Photography lessons
- Board games and puzzles

Visit hr.osu.edu/benefits/lisa for a complete list of eligible expenses, to review eligibility requirements and learn how to obtain LSA funds. Employees with specific LSA eligible item questions should contact Health Equity.



Other Wellness Benefits

Caregiving Back-Up Support

Ohio State offers a back-up care benefit and family concierge to assist eligible individuals in balancing the competing demands of life and work.

Bright Horizons Family Concierge™

Family Concierge provides time-saving personalized guidance and creates a customized plan for family care based on what's available to you through your Bright Horizons benefits. Care for young children, school-agers, and elder loved ones — both temporary and long-term. Plus, access tutoring and help with household responsibilities. And as your family's needs change, we'll adjust your care plan accordingly.

Here's what this benefit includes:

- **Expert support** — 1:1 assistance via chat, phone, email, text, or video to find the right care for your family
- **Proactive guidance** — personalized outreach, coaching, and reminders to help lighten the load of care and enrichment planning
- **Personalized resources** — curated content, care plans, and webinars that provide the information you need, every step of the way

Bright Horizons Back-Up Care™

Eligible employees have access to a network of high-quality childcare centers and in-home care providers, which provide temporary care when you have a disruption in your regular care. To help ease the cost of paying for back-up care, employees will only pay a co-pay while Ohio State pays for the rest of back-up care utilization. Co-pays paid for back-up care can be reimbursed through the [Lifestyle Spending Account \(LSA\)](#).

Back-Up Care copay details (balances reset January 1)

- Eligible employees can access up to **10 back-up care days per employee per year**
- Center-based care is **\$25 per child/day** or **\$40 per family/day**
- In-home care for children and adults is **\$10 per hour**
- If network care is unavailable, employees will be **reimbursed \$100 per day** if they secure a personal caregiver.



THE OHIO STATE UNIVERSITY

HEALTH PLAN

Healthy Snacking



Purpose of Snacks

- Provides a boost of energy if several hours pass between meals and blood glucose levels drop.
- Helps curb your appetite to prevent overeating at the next meal.
- Provides extra nutrients when choosing certain snacks like fresh fruit or nuts.





THE HUNGER SCALE





Snacks VS Treats



SNACK

A small portion of nutritious food eaten between meals when we feel hungry. Snacks choices have more nutrition for our bodies and brains.

TREAT

A less nutritious food, often highly palatable because of higher salt, fat, and sugar amounts. Meant to be enjoyed only on special occasions.





Emotional Hunger **VS** Physical Hunger

Occurs suddenly and instantaneously

Builds gradually over time

Craves specific foods

When we're experiencing physical hunger, we'd be happy to eat anything

Leads to eating to satisfy a craving

Leads to eating for physical satisfaction





Healthy Snack Ideas

Snacking and Protein – Prioritize 2 Proteins to 1 Carb

- **Greek Yogurt with Fruit:** Greek yogurt is high in protein and pairs well with fresh fruit for added vitamins and fiber.
- **Cottage Cheese with Berries:** Cottage cheese is rich in protein and can be topped with berries for a tasty and healthy snack.
- **Hard-Boiled Eggs:** Hard-boiled eggs are a convenient and protein-packed snack that can be prepared in advance.
- **Nut Butter with Apple Slices:** Pairing apple slices with almond or peanut butter provides a good balance of protein, healthy fats, and fiber.
- **Edamame:** These young soybeans are high in protein and can be enjoyed steamed and lightly salted.
- **Hummus with Veggie Sticks:** Hummus is made from chickpeas and provides protein and fiber. Pair it with carrot sticks, celery, or bell pepper strips.
- **Tuna Salad on Whole Grain Crackers:** Mix canned tuna with a bit of Greek yogurt or avocado and serve on whole grain crackers.



Healthy Snack Ideas

Snacking and Protein – Prioritize 2 Proteins to 1 Carb

- **Jerky:** Beef, turkey, or chicken jerky are high-protein snacks. Opt for varieties with low sodium and minimal additives.
- **Protein Smoothie:** Blend protein powder with a banana, spinach, and almond milk for a quick and nutritious snack.
- **Almonds or Mixed Nuts:** Nuts are a good source of protein and healthy fats. A small handful can be very satisfying.
- **Cheese and Whole Grain Crackers:** Cheese provides protein and calcium, and pairing it with whole grain crackers adds fiber.
- **Chia Pudding:** Chia seeds are high in protein and omega-3 fatty acids. Mix them with almond milk and let it sit to form a pudding, adding a touch of honey and berries.
- **Boiled Shrimp:** Shrimp are low in calories and high in protein. Boil and chill them for a quick snack.
- **Roasted Chickpeas:** Chickpeas can be roasted with spices for a crunchy and protein-rich snack.



Healthy Protein & Fiber Snack

Chickpeas

verywell

35g CARBS

210 CALORIES

3.8g FAT

10.7g PROTEIN

9.6g FIBER

(per cup, canned)

- ✓ Cholesterol-Free
- ✓ High-Fiber
- ✓ Low-Sodium
- ✓ High-Protein

Chickpeas are an excellent source of vitamin B6, folate, vitamin C, and soluble fiber

Roasted Chickpeas

Ingredients:

- 1 1/2 cups cooked chickpeas, drained and rinsed
- Extra-virgin olive oil, for drizzling
- Sea salt
- Paprika, curry powder, or other spices (optional)



Directions:

1. Preheat the oven to 425°F and line a large baking sheet with parchment paper.
2. Spread the chickpeas on a kitchen towel and pat them dry. Remove any loose skins.
3. Transfer the dried chickpeas to the baking sheet and toss them with a drizzle of olive oil and generous pinches of salt.
4. Roast the chickpeas for 20 to 30 minutes, or until golden brown and crisp. Ovens can vary, if your chickpeas are not crispy enough, keep going until they are!
5. Remove from the oven and, while the chickpeas are still warm, toss with pinches of your favorite spices, if using.
6. Store roasted chickpeas in a loosely-covered container at room temperature. They are best used within two days.



<https://www.thisgrandmaisfun.com/roasted-chickpeas-recipe/>



Serving: ½ cup **Nutrition:** 420 calories; 58g carbs, 11g fiber, 19g protein; 14g fat



Top Reasons to Work with a Health Coach

1. Time set aside just for you.
2. A partner who's invested in your progress.
3. Help setting realistic goals and action plans.
4. Encouragement when sticking to the plan is hard.
5. Healthy changes! Feel better. Do better - on your terms.



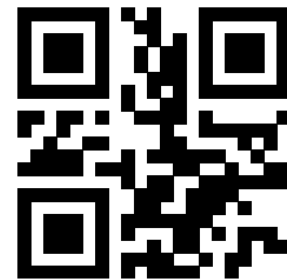
Health Coaching is available to benefits-eligible OSU and OSUMC employees.

Free. Done by phone. Calls are 30 min or less!

To schedule a call, email us your availability.

HealthCoach.OSUHealthPlan@osumc.edu

Or submit a request via our website.





THE OHIO STATE UNIVERSITY

HEALTH PLAN

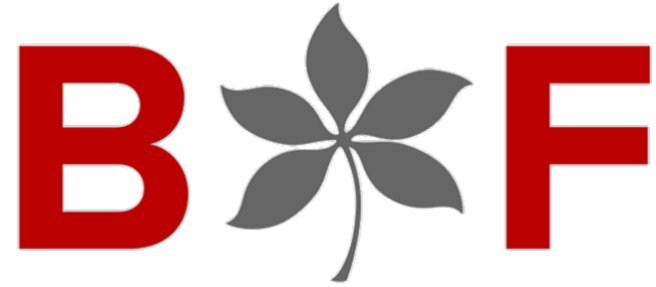
Questions?

Thank you!



UPDATES & ANNOUNCEMENTS

WELCOME TO



Clayton Barbier, Senior Information Systems Auditor

Pranav Kelker, Debt Management Consultant

Ben Rau, Logistics Coordinator



PROMOTIONS

Jackie Anderson, Payroll Senior Analyst

Jennifer Arend, Associate Director, Medical Center Audit

MD Hussain, Accounts Receivable Specialist

Amy McMahon, Treasury Senior Consultant

Brian Newell, Chief Audit Executive

John Snedeker, Associate Director, Information Systems Audit

Stephanie Wittpenn, Marketing Operations Coordinator

Marji Yenne Business Transactions and Services Coordinator



Thank You

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B



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**BIG
SHOUT
OUT!**

Gloria Wood, Executive Assistant, Operations, in recognition of coordinating the recent B&F Admin Group Employee Appreciation Dinner at Rusty Bucket

This event was so appreciated, and it was wonderful having everyone together to enjoy a meal and lots of laughter. Gloria has been an amazing resource since I started in B&F and it has been a pleasure working with her. Thank you, Gloria!

-- Anita Bratcher, Executive Assistant to CFO

Jessica Mingus, Chaunce Thomas and David Hanks, Supplier Maintenance, in recognition of proactive collaboration

I wanted to give a huge shout-out to the entire Supplier Maintenance (UNIV) Team of Jessica, Chaunce, and David. This last year of working alongside them has been a wonderful journey. All 3 of them consistently showed kindness, camaraderie, and leadership throughout the year training me on tasks so that I could assist with SM tasks. Every single day with the SM Team includes positive energy, having each others' backs, pride of work, opportunities of learning, and most importantly; the 'thank you' 'you rock' and 'we got this' mantras that are the glue to the Team. Thank you Jessica, Chaunce and David for being such great People, Mentors, and TEAMmates. -- Penny Lykins, Accounts Payable Coordinator



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**BIG
SHOUT
OUT!**

Ashley Wilson, Supervisor, Accounts Payable, **in recognition of great customer service**

I want to acknowledge Ashley for her professional and proactive assistance on 7/31/24. At the end of a long day, I rushed an invoice through submission before noticing the PO referenced was incorrect. In my haste to correct, I resubmitted another correct invoice. I decided that I might need to call AP to clarify some details to ensure that there would not be a duplicate payment. Mind you this is very late in the day (nearly 5 p.m.). Ashley responded immediately and remedied my mistake with manual intervention from the automated process. Much appreciation for her responsive professionalism! -- Marie Peterson, Associate Director, Business Transactions and Services

Kelly Hays, Lead Coordinator, Accounts Payable, **in recognition of proactive collaboration**

Kelly always goes above and beyond to help Teammates with questions/problem-solving. She is highly knowledgeable and will go to great lengths to explain the 'why' behind the 'what' when giving context to training, etc. Kelly is gracious with her time and knowledge, always willing to help me with random questions covering multiple categories, etc. Most recently, Kelly took time to work with me on some additional training to improve my skills in OnBase. Never rushing, explaining her ideas and patient with my questions. The results were immediate and my metrics in OnBase have improved. Kelly is the example of a compassionate, knowledgeable and engaging Leader. We are truly lucky to have her in AP. Thank you Kelly for all you do each day for OSU, our Customers, and most importantly, our Teammates. -- Penny Lykins, Accounts Payable Coordinator



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**BIG
SHOUT
OUT!**

Susan Saffell, Lead Coordinator, Business Transactions & Services, Accounts Payable, **in recognition of great customer service**

*Susan is one of the most conscientious, hardworking, and pleasant staff at The Ohio State University to work with. She has been working with my section and me for the last fifteen years to make sure our orders are ordered correctly and in a timely manner. She goes out of her way to always correct my ordering mistakes and to show me and my staff more efficient ways to make the finance team's jobs more efficient. I can't express enough on how pleasant Susan is each and every time I work with her on ordering questions or concerns. Thanks for Everything! -- **Bryan Kessler, Lab Supervisor, Veterinary Medicine***

Chrissy Sprouse, Senior Analyst, Business Processes, **in recognition of exceeding expectations**

*Chrissy worked tirelessly (sometimes around the clock!) to help ensure a successful year-end close for FY24. This included closing 45k old purchase orders and rolling another 45k purchase orders into the new fiscal year. She also closed almost 220k old requisitions, which will help speed up reporting. Unfortunately, this work is much more manual than we would like due to Workday limitations. I truly appreciate her tenacity and efforts and I am so thankful to have her on my team! – **Juliette Lonsert, Associate Director, Internal Controls***



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**BIG
SHOUT
OUT!**

Kathy Cubert, Senior Coordinator, Business Transactions & Services, in recognition of great customer service

Our team has been short staffed with a heavy case load for about 2 months now. Kathy has been more than carrying her share of the workload. She is a very hard worker and always has a minute if you need to ask a question. Thank you Kathy!
– **Shawn Parsell, Business Transactions Coordinator**

The Blackwell Sales Team, in recognition of great customer service

The Blackwell Sales Team has and continues to do an outstanding job in booking and detailing our events and conferences to ensure their success! Contracts to a wonderful team! – **Melodie Reed, Director Sales, Business Advancement**





Thank You

A B F BIG SHOUT OUT!



Lisa Poturalski, Senior Risk Analyst, **in recognition of the dedication** and work done to accelerate the finalization and closing one of the largest property, research and income losses in OSU history.

-- *Josh Tabler, Associate Director, Insurance Risk*

Greg Christian, Business Continuity Program Manager, **in recognition of mastering** a new business continuity software system and co-leading the in-person Business Continuity workshops for our units and colleges.

-- *Vella Garrett, Associate Director, Business Continuity Management*

Daniela Olson, Executive Assistant, **in recognition of the “lift”** she has provided to the entire department. She is the oil that makes the machine run and the glue that keeps us together.

-- *Terry Rodeman, Insurance Administrator*



Financial Operations comprises of
244 employees.

In lieu of individual shout outs, I wanted to express
appreciation for all the teams' efforts

Payroll Services

Total Gross Payroll	\$3,668,617,147.⁴⁸
Employees Paid W2's Issued, total number	77,780
Payroll Cycles, total number	38 On cycles Minimum 104 Off cycles
Retro Calculations, total number	266,631
Off Cycles Processed, total number	6,759
Overpayments, total number: 513	117 collected through paychecks 396 in accounts receivable, \$1,178,202.⁰⁰
Payroll Accounting Adjustments (PAA'S), total number	25,890



Office of the Controller and Shared Services



Continuous improvement culture:

- Improved monthly financial and transactional/KPI reporting
- Continuous process reengineering
- Special projects (e.g. data for senate presentation, earnings operations, HRSD model, SOD conflicts)
- On time delivery for all external deadlines (external audit, tax filings)



University-wide Assistance & Transaction Support

- 110,000 procurement and expense transactions processed
- 23,000 airfare transactions analyzed
- 900 new PCards and 1,500 maintenance requests
- 270 FDM requests processed
- 11,000 inquiries for assistance
- 120 reports created or enhanced
- 10 business processes enhanced
- 35 new training materials
- 56 Office hours hosted
- 20 PSSC and 9 FSSC customers



Operations

Central Receiving - FY24 saw another year of record volume (~400,000 received/delivered packages). This is the third year in a row of increased annual volume (higher than Pre-Covid era)

Accounts Payable/Supplier Maintenance – For extra support during the last few months in processing as many transactions as possible for fiscal year-end close.

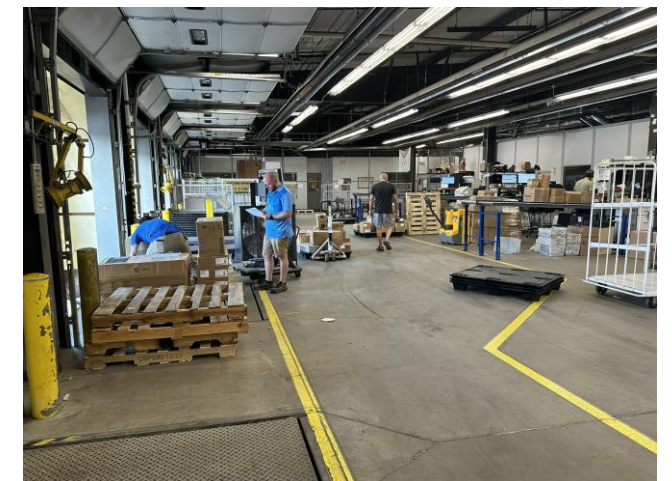
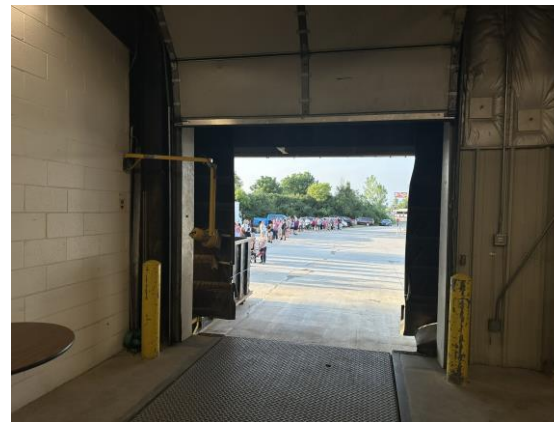
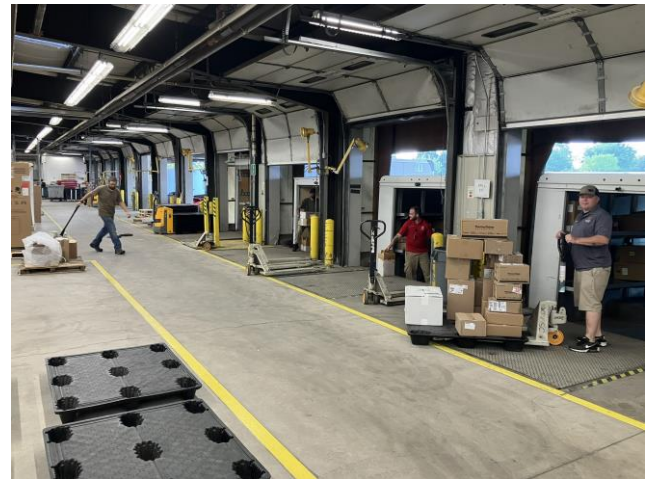
Purchasing – For exceeding our Cost Savings Objective of \$50 Mils. (\$59.9 Mils. Actually achieved)



Operations

STORES , TECH HUB, SURPLUS, GAS WAREHOUSE, MAIL ROOM

All areas have seen increased volumes and/or improved financial performance in fiscal 2024
Thank you for continuing to re- envision the work we do!



Financial Planning & Analysis

Continuous improvements include but not limited to:

New and improved LRFP, tuition model, college and unit scorecards, improvements to adaptive, better discipline in the bottom-up budgets from colleges and units

In collaboration with University Advancement, developed a new funding model that allows for long-range strategic planning.

OE@OSU

Completion of significant data-based assessment of outcomes of University Safety programs



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**BIG
SHOUT
OUT!**

Faye Wintering, Senior Auditor, Department of Internal Audit, **in recognition for developing great partnerships**

Faye is an experienced auditor on our Medical Center Audit Team and is highly regarded by her Internal Audit peers and by colleagues throughout the Medical Center. Faye is routinely recognized by Medical Center managers for her audit efficiency, thoughtful audit approach, and valuable suggestions and advice. In a recent audit of a significant business operation at the Medical Center, the director of the unit went out of her way to repeatedly recognize and praise Faye (i.e., emails, audit survey, multiple meetings) for fantastic audit service. The director was particularly impressed with the compassionate way that Faye conveyed audit concerns and for the speed of the audit.

Department of Internal Audit, **in recognition for ensuring a seamless leadership transition**

Kevin Patton retired effective August 1st after 29.5 years at OSU, including 23 years as the leader of the Department of Internal Audit. Recognizing that Kevin's departure would require some changes and reorganization within the Department, the entire Internal Audit team stepped up and embraced the changes and willingly took on or supported additional responsibilities. The efforts of the entire team was instrumental for ensuring a smooth and seamless transition.



A

B



F

**BIG
SHOUT
OUT!**

Erin Karzmer, Sr. Assoc. General Counsel

Gloria Wood, Bus. Ops Sr. Specialist

Julie Grubb, Director, Financial Operations

Kelly Des Roches, Chief of Staff

Kyong Wahl, Sr. Assoc. General Counsel

Lisa Plaga, Controller

Our office responds to market conditions and contractual issues. This often requires us to act very quickly. These play makers are essential to our work. They always responds positively to our interruptions with rapid action and exemplary service – making it possible for us to do our best for the university. We could not be successful without their contributions to our team!

-- The Comprehensive Energy Management team



A

B



F

**BIG
SHOUT
OUT!**

Office of Investments Team in recognition of working collaboratively, generating strong returns and building a great team culture.

Renee Schade, Jo’Vanna Zanders and Ryan Sprayberry in recognition of advancing our best-in-class operational due diligence and checklists, managing IWG reports and meeting coordination and onboarding new team members.

Tim Reading, Drake Sims and Christina Paliyannis in recognition of great strides made in building the **LTIP liquid portfolio** including an alternate to large cap passive exposure, a new emerging markets manager and capitalizing on attractive yields in liquid credit.

Samir Sidani, Aaron Estrel and Shanelle Aranha in recognition of continuing to build on an excellent **illiquid portfolio** including a new venture capital manager, a new India growth manager, co-investments in the digital infrastructure space and a two new illiquid credit managers.





Office of Financial Services



Thank You



Leadership & Innovation

Completing comprehensive banking services RFP & improving payment acceptance across the university

Amy McMahon, Treasury Senior Consultant

Matthew Moore, Treasury Consultant

Mentorship of Bucks Go Pro intern.

Larissa Batche, Senior Investment Analyst

Efficient integration and seamless transition of job responsibilities after the retirement of a key treasury debt role

Garrett Patterson, Director of Debt Management & Internal Bank

Sean Hassler, Debt Management Senior Analyst

Keira Rife, Treasury Analyst



Improving the Customer Service and Student Experience

Implementation of PeopleSoft Campus Solutions direct deposit for student refunds.

Kim Wortkoetter – Sr. Business Analyst Lead

Nidhi Kak – Sr. Systems/Business Analyst

Jasmine Anderson – Associate Bursar

Tami Spells – Finance Business Process and Systems Consultant,

Rayne Bateson – Finance Business Process and Systems Analyst,

Collaboration with Workday product development on generative artificial intelligence for Customer Accounts.

Carinna Butters – Assistant Bursar Collections

Todd Lambert – Collection Manager

Wendy Moore – Collections Specialist

Karen Neese – Collection Specialist



2024 OFS Service Event





Thank You



SAVE THE DATE

Annual Tailgate: October 2, 2024

Holiday Gathering: December 11, 2024