

# URIC

## Administrative Meeting

October 16, 2019

# Agenda

## October 16, 2019

TIME	TOPIC	PRESENTER
9:00 – 9:15	Introduction & Updates	Joe Boes
9:15 – 9:30	Facilities Connect	Scott Reiter
9:30 – 10:00	COI Overview	Kate Booth
10:00-10:15	HR Updates	Beth Abbott
10:15-10:30	Staff Engagement: Psychological Safety	Esrea Perez-Bill Jen Zhou
10:30	Closing & Questions	Joe Boes

# Updates

- Vice President for Research transition
  - Jay Walsh named as Sr. Advisor to President
  - Milan Mrksich named as Interim VPR
- Website Updates: <https://urica.northwestern.edu>
  - Look and feel (slight) differences due to move from Drupal platform for all
  - [Staff Contacts](#)
    - SmartSheets list, webform to request updates for your area
  - [Proposals: URIC or Department](#)
  - Coming soon: HR SOP & Onboarding template
  - Please provide input – What would be most helpful to you/your URIC: What functions? What topics/resources? How best to present?
- Events Registration and E-Commerce (credit cards)
  - [Link](#); Use and need amongst the group, show of hands:
    - Currently use event registration or merchant services?
    - Have an immediate need? Foresee a need down the road?

# Updates, continued

- Fiscal Year Close and Beginning
  - Projections and Accuracy at 3<sup>rd</sup> Quarter
  - Projections for 1<sup>st</sup> Quarter - 12/12/19
  - Budget Packets: distributed, reach out for questions to Alexandra
- Department Tree / Department Naming
  - Reconfigured Department Tree
  - Cross-naming alignment (NUFs, myHR, InfoEd)
- FY19 Sponsored Activity
  - Proposals: 42% (\$82.2M) growth in submitted dollars; \$279.9M Total; Average \$1.15M/proposal
  - Awards: 24% (\$13.7M) growth in awarded dollars; \$70.4M Total; Average \$285k/awards
  - Largest average proposal/award & largest growth rates of major research areas

# Facilities Connect

Scott Reiter

[Link to Test Environment](#)

## FACILITIES CONNECT OVERVIEW

Facilities Connect contributes to the delivery of a safe, sustainable, and reliable operating environment. Facilities Connect supports Facilities' operating tenets:

### Be One Team

Centralized and integrated platform that tracks and manages workplace information at every stage of the facilities lifecycle



### Focus on Customers

Single desktop to view facilities information, perform self-service and validation activities, and access revamped, customer-centric Facilities services for request



### Always Improve

Highly-scalable platform that allows for expanded use of capabilities and future integrations with more data sources



### Know The Business

Real-time metrics and data updates through integrations with NU Enterprise systems



### Be Transparent and Open

Up-to-date financial information for projects and work tasks and direct ownership of non-building charge approvals



### Meet Commitments

More reliable and timely services to maintain University assets with improved data capture to perform analysis of metrics and business operations.






### Facilities Operating Tenets

## FACILITIES CONNECT RELEASE PLAN


Facilities Connect will launch new Operations & Maintenance (O&M) functionality to replace the existing FAMIS work order management system.


2018

- ✓  **Space Information**
- ✓  **Space Validation**
- ✓  **Project Management (Facilities Only)**

✓ = Released

2019

- ✓  **Operations & Maintenance (Building Blocks)**
  - Building Assets
  - Vehicles, Tools, Test Equipment
  - Lock Out Tag Out Procedures

-  **Operations & Maintenance (Core)**
  - Corrective Maintenance
  - Preventive Maintenance
  - Inventory Management
  - Key Requests
  - Time Tracking
  - Job Costing
  - Mobile Tools

Expected  
Winter  
Quarter



## FACILITIES CONNECT O&M CUSTOMER FEATURES

Facilities Connect O&M module will deliver impactful improvements to the NU Facilities customer experience, including:



**A centralized, one-stop shop** to access and interact with NU Facilities services and information



**Improved service request management** with new progress-based notifications and integrated service request history



**Automated dispatch** of service request types that do not require approvals, allowing customer approvals to focus where controls are needed



**Automated prioritization of work tasks** for greater consistency in service delivery, governed by new, transparent service level expectations



**Allow for multiple requestors** within each department / unit with accurate request routing for any required service approvals

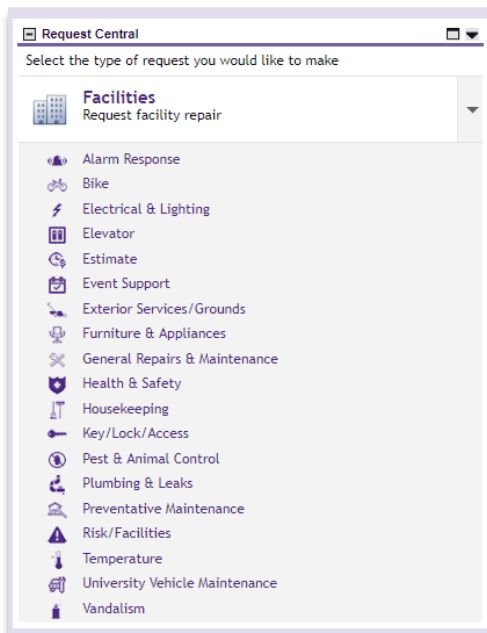


**Track and trace service requests**, encouraging responsiveness and accountability





## REQUESTER EXPERIENCE



Revamped Request Classes,  
Improved Terminology, More  
Intuitive

**My Active Requests**

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requester
SR-1000837	Estimate Request	178: Create an Estimate for a Work Task	08/22/2019 15:47:24	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000833	Fix/Replace Window Blinds	12: Work Task Rejected	08/22/2019 11:16:55	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000829	Furniture & Appliances Other	test	08/21/2019 17:50:34	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000828	Recycling Bin	test	08/21/2019 17:45:46	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000827	Fix/Replace Window Blinds	75: Completes Work (Work Task has multiple Workgroups)	08/21/2019 13:26:14	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000826	Fix/Replace Window Blinds	10: Add Resources (In same workgroup)	08/21/2019 11:49:24	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000825	Fix/Replace Window Blinds	178: Create an Estimate for a Work Task	08/21/2019 10:12:28	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000824	Fix/Replace Window Blinds	178: Create an Estimate for a Work Task	08/21/2019 10:04:30	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000821	Fix/Replace Window Blinds	15: Add Comment/Photo/Document	08/16/2019 11:38:18	cstGeneralRequestor, cstGeneralRequestor	cstGer
SR-1000818	Room Lockout	The door is locked to my office and I do not have a key	08/16/2019 09:56:53	cstGeneralRequestor, cstGeneralRequestor	cstGer

More >

**Requests For Someone Else**

**My Request History**

Summary views with up to date status and  
important notifications.



## APPROVER EXPERIENCE

Reminders - Request Central

1 - Action Items
10 - Notifications
0 - My Pending Surveys

Dashboard of 'Action Items' awaiting approval.

Home > Requests > Action Items
Open In New Window
Add to Bookmarks
My Bookmarks

Action Items

Accept

Action	Record Name	Type	Due	Status	From
Required Review	1295816 - Service Request-SR-1000615-0-1295816	Approval	09/25/2019 15:45:18	ASSIGNED	GeneralRequestor, Training - 5004520

**From:** wasadmin@x00192.cds.tririga.com <wasadmin@x00192.cds.tririga.com>  
**Sent:** Wednesday, September 25, 2019 3:45 PM  
**To:** Gail R L Renfrow <g.renfrow@northwestern.edu>  
**Subject:** Facilities Connect Action Item - Required Review (1295816 - Service Request-SR-1000615-0-1295816)

You have been assigned an Action Item in Facilities Connect.

Action Item: Required Review  
 Record: 1295816 - Service Request-SR-1000615-0-1295816 (triApproval)  
 Assigned at: 09/25/2019 15:45:18  
 Assigned By: GeneralRequestor, Training - 5004520

[Approve](#)
[Return](#)

### Links


- [Record for Approval](#)

eMail Push Notification for Items Awaiting Approval



## APPROVALS

### What needs approving?

- Requests for discretionary services funded by customers/departments  
 *Facilities Connect calls these 'Non Building Charges'*
- Facilities Connect automatically knows which charges are Non Building based on the request type.
- Non Building charges will require a chart string to be entered.

### Why are there approvals?

- Facilities Connect enables any staff/ faculty to directly submit Facilities requests
- Provides departments the ability to self-control discretionary spending

### What is the role of an approver?

- To approve or deny the work/ expenditure
- All non building work must be approved before the system sends it to Facilities
- Single-step approval only (no multiple-step approval steps)

### Examples of Items Requiring Approval



Requests for Furniture & Appliances  
Hanging Bulletins/ Whiteboards/ TVs  
Painting  
Shelving & Pictures Hanging  
Additional Housekeeping Services  
Flooring Replacement  
Interior Signage  
Portable Lamp Maintenance  
Key Requests  
Bike Removal/ Bike Lock Cutting  
Bike Repair Station Maintenance  
Etc.



## APPROVALS



### Who is the approver?

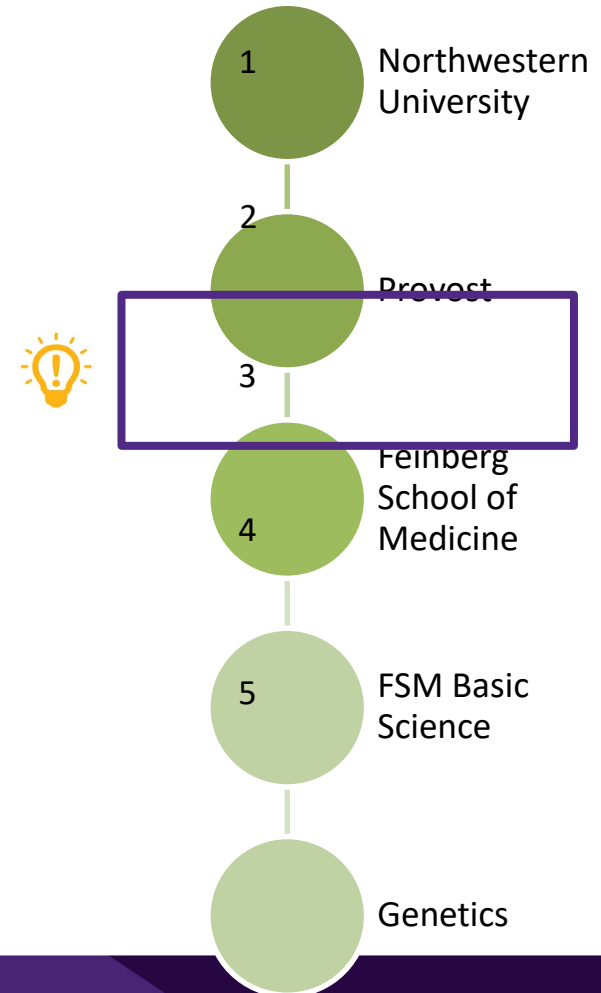
- Approver is derived from the chart string entered in the service request
- Departments determine (ahead of time) which level in their chart string department hierarchy to use for approvals for service requests (school, department, etc)
  -  *To reduce the amount of maintenance, Facilities recommends the highest level of the hierarchy (least granular) that is appropriate (e.g. school level)*
- Departments (ahead of time) identify people to be the approvers for the selected level
  -  *To cover absences, multiple people should be identified; first to take action will move the request thru the process*

**TO DO:** Verify/name your approvers for each area

**SEND TO:** FacilitiesConnect@northwestern.edu

**DUE BY:** 10/18

### Sample Chart String Hierarchy



## Q&A



Questions or Feedback? Please email the Facilities Connect team at:

[FacilitiesConnect@northwestern.edu](mailto:FacilitiesConnect@northwestern.edu)

For the latest information, visit the Facilities Connect website (news, training, FAQ, Team List):

[www.northwestern.edu/fm/connect](http://www.northwestern.edu/fm/connect)

# COL Overview

Kate Booth

# HR Updates

Beth Abbott

# HR Updates

## Salary History Ban

- Effective 9/29/19 prohibits employers from:
  - Soliciting information regarding wage, salary and benefit history from job applicants, or their previous employers
  - Considering wage, salary or benefit history in compensation and hiring decisions, if voluntarily provided by an applicant
  - Requiring employees to sign a contract or waiver prohibiting them from discussing compensation with other employees
- Employers Can:
  - Share information with an applicant about the wage, salary or benefits being offered for a position
  - Discuss an applicant's expectations with respect to wage, salary or benefit information



# Updates, continued

- Don't ask:
  - What were you earning in your last position?
  - What is included in your current benefit package?
- Do ask:
  - What are your salary expectations for this role? Or, at this point in your career, what are your salary expectations?
  - What compensation and benefits are you seeking?

# Updates, continued

## Temp Hiring Update

- Request process is moving to OnBase for sourced and direct temps. Will roll this out slowly with Institutes and Centers.
- Direct Temps:
  - I-9 sections 1 and 2 must be completed by candidate prior to submitting request
  - Personal Data form information must be complete and correct
  - Non-student direct temp checklist:  
<https://www.northwestern.edu/hr/documents/for-managers/temphirechecklist-nonstudent.pdf>

# Staff Engagement: Psychological Safety

Esrea Perez-Bill  
Jen Zhou

# Office for Research Proposed Values

*Psychological Safety, Autonomy, and Empowerment OR Implementation Team (PSAE)*

# Psychological Safety, Autonomy, and Empowerment

## Implementation Team

- Beth Irwin
- Claire Landis
- Esrea Perez-Bill
- Jen Zhou
- Julie Cowan
- Matthew Herrera
- Nathalia Henry
- Sean Perry
- Theo Downs

## Leadership Champions

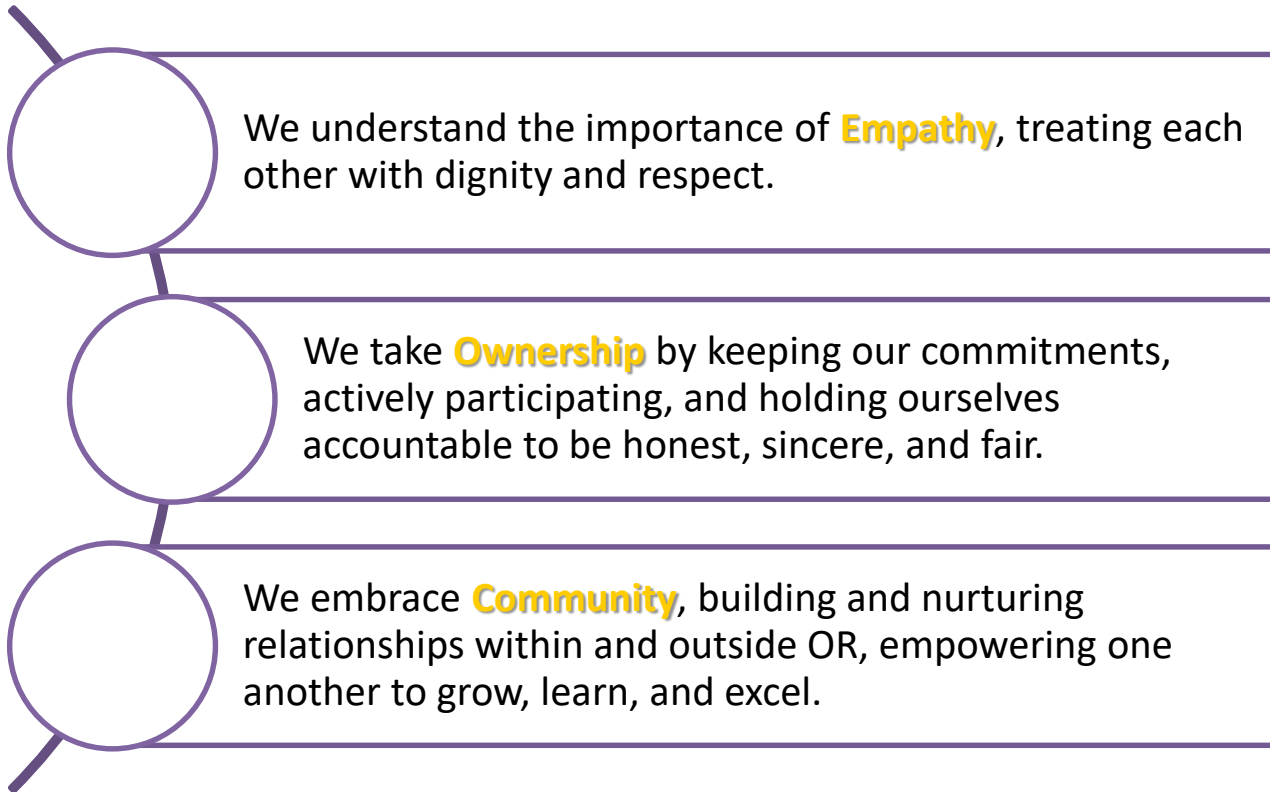
- Ann Adams
- Rex Chisholm
- Rich D'Aquila
- Fruma Yehiely

# Background

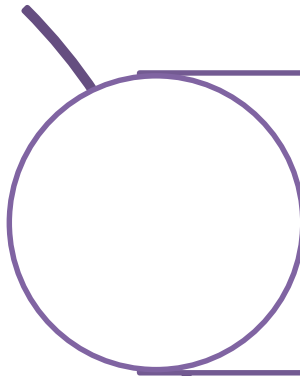
The Implementation team was formed to establish values to address the Action Team's  
**Key Findings**

1. High Tolerance for Poor Behaviors and Lack of **Accountability**
2. Lack of System or Requirements to Ensure **Training** of Management and Staff
3. Issues with the **Hierarchical Structure** of Office for Research

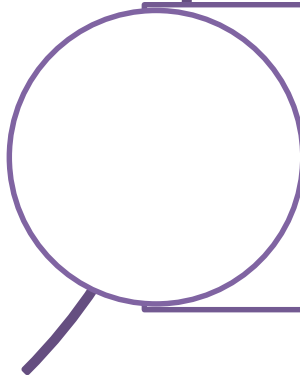
# Proposed Values



# Proposed Values



We work to ensure **Fairness**, building processes and systems that are transparent and equitable, embracing the highest ethical standards.

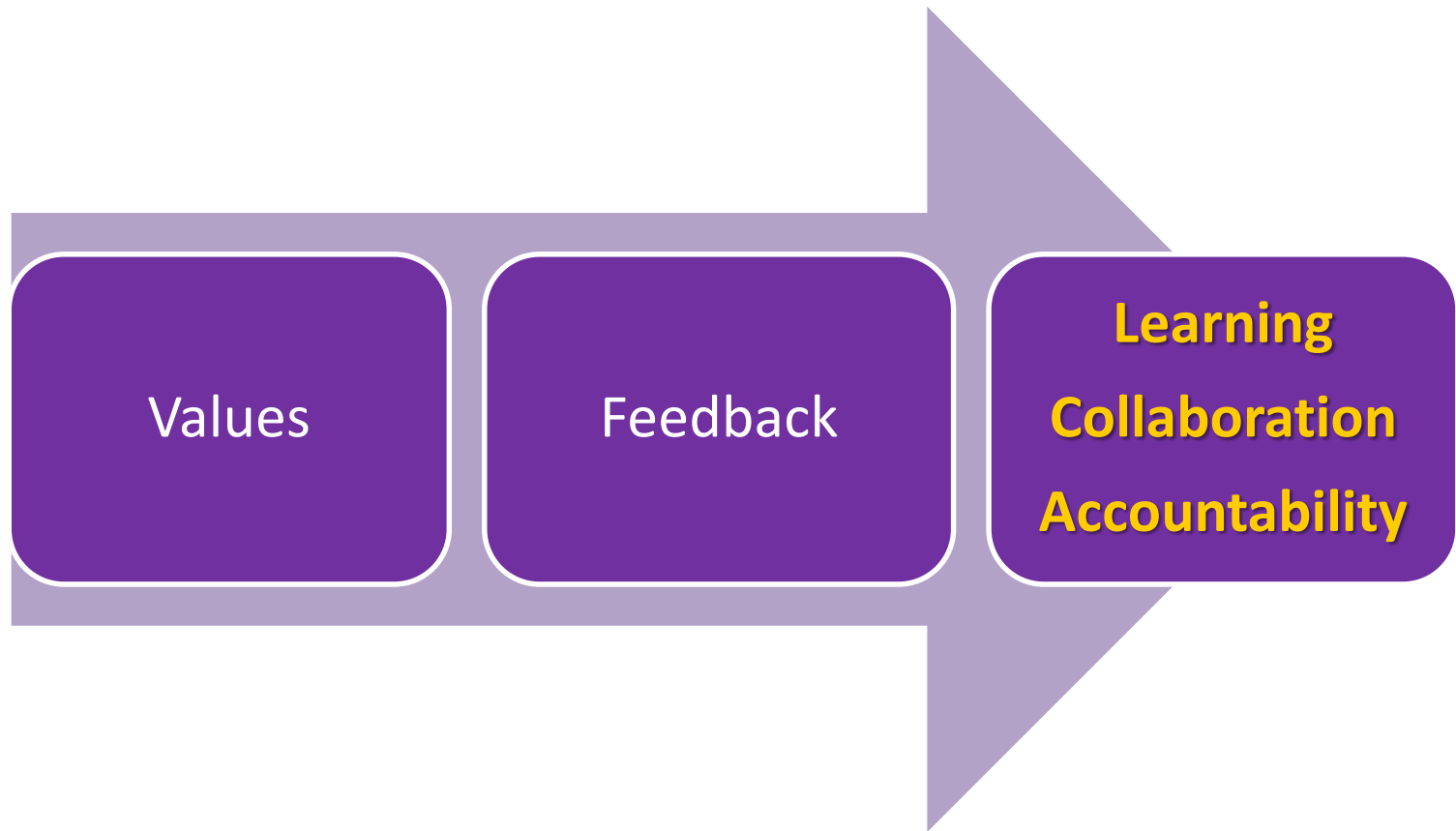


We encourage **Creativity**, empowering innovative solutions, and promoting responsible risk-taking and autonomy.



The image features a solid purple background. In the center, there is a white speech bubble with a thin yellow outline. Inside the bubble, the text "What's Next?" is written in a bold, white, sans-serif font. The speech bubble has a pointed bottom, suggesting it is a callout or a question. The overall design is clean and modern.

**What's Next?**



## Psychological Safety, Empowerment, and Autonomy Implementation Team

Our Implementation Team is excited to announce the creation of  
**Five Proposed OR Values.**

Please help us navigate this important initiative by providing your feedback below.

### FIVE PROPOSED OR VALUES

- We understand the importance of **Empathy**, treating each other with dignity and respect.
- We take **Ownership** by keeping our commitments, actively participating, and holding ourselves accountable to be honest, sincere, and fair.
- We embrace **Community**, building and nurturing relationships within and outside OR, empowering one another to grow, learn, and excel.
- We work to ensure **Fairness**, building processes and systems that are transparent and equitable, embracing the highest ethical standards.
- We encourage **Creativity**, seeking innovative solutions and methods in all we do, encouraging responsible risk-taking and autonomy, and supporting each other in the quest for continuous improvement.

GIVE YOUR FEEDBACK  
HERE >

Responses will  
be completely  
anonymous.

We will use your feedback to establish robust, universally applicable  
training and learning curricula in support of these OR values.

Please Provide Your Feedback!

- [Visit Our Website](#)

Access the Short Survey:

- <https://bit.ly/336kV9E>

# Closing & Questions

**THANK YOU!!!**