

FBO/BAO Partnership Retreat

March 6, 2019



Welcome

Bill Decatur, VP FBO

FBO & BAO Partnership Goal:

Develop & strengthen the FBO & BAO partnership to improve operational efficiency and effectiveness and achieve excellence in business processes across the University.

Objectives: Communication - - Process Improvement - - Training



Objectives for Today

Foster a collaborative learning environment

Communicate: Share updates and ask questions

Process Improvements: RCM, COA work

Train: Adaptive Insights software



Agenda

Morning

- Program Kick-off
- Mix & Mingle – Communication Update
- Break
- RCM Update – Panel Discussion and Q&A
- Afternoon
 - Adaptive Insights – Training
 - Break
 - Chart of Accounts – Account Code Review
 - Break
 - February BAO Meeting - in March
 - Wrap-up and Close



Proposed Session Guidelines

- Be Present
- Contribute your ideas
- Respect for ideas of others
- Listen to understand
- Step Up / Step Back



Mix & Mingle – Communication Update



Instructions: Mix & Mingle – Communication Update

- FBO/Central member(s) provides update information to the table (3-4 minutes)
- Table proposes one question to FBO/Central member for response (2-3 minutes)
- FBO/Central member(s) rotates to next table



RCM Update – Panel Discussion and Q&A



RCM Update – Panel Members

- **Keith Whitfield** – Provost & Vice President Academic Affairs
- **Bill Decatur** – Vice President, Finance and Business Operations
- **Laurie Clabo** – Dean, College of Nursing
- **Rebecca Cooke** – Assoc. Vice President for Health Affairs



Lunch



Adaptive Insights – Training

Jeff Bolton – Asst. Vice President, Budgets

Alan Jacobson – Lead Budget & Planning Analyst



Chart of Accounts – Account Code Review

Tamaka Butler – Asst. Vice President & Controller

Marlene Erno – Sr. Director Research Support Services



February BAO Meeting - in March

Adeeb Mozip – Director Business Affairs



Wrap-up and Close

