"Together we have much to be proud of. Let us therefore be proud of this great culture, let us nurture it, and above all, let us open it up to as many people as possible. That is a process with which this college has been closely involved for three centuries."

His Royal Highness Prince Charles
Today’s Agenda

- Welcome
- History of William & Mary
- Training Resources for Employees
- Student Affairs
- Workplace Resources
- BREAK
- Information Technology
- Financial Operations
- Procurement Department
- Police Department
- Tour
Chartered on February 8, 1693, by King William III and Queen Mary II of England

The second oldest college in America

Severed formal ties with Britain in 1776

Became state-supported in 1906 and coeducational in 1918

Phi Beta Kappa, the nation's first academic Greek society, was founded here in 1776
Our History – The Highlights

- The nation's first Honor Code

- Three Presidents of the United States benefited from educational programs offered by the College: Thomas Jefferson, James Monroe and John Tyler.

- William & Mary is the fifth-highest producer of Peace Corps volunteers among medium-sized colleges and universities having one Peace Corps volunteer for every 126 students in the undergraduate body.
While the history of W&M has shaped our present... the best way to be up to date with who we are now include...

Twamptannica

You Tube

Thriller

Williamsburg – A State of Mind
WHERE is W&M?
WHERE is W&M?
Who are we? By the Numbers

- Over 5550* employees
  - W&M (includes Ash Lawn & DC) = 5,000+
  - VIMS (includes Eastern Shore & Aqua center) = 550+

- *Hourly 3,000
  - Many hourly are students
HOW are we structured?

Board of Visitors

President

VP Student Affairs
VP Office of Finance
VP Athletics
VP Office of Admin
VP Public Affairs
VP University Development

Provost

Dean VIMS
Dean Arts & Science
Dean University Library
Dean School of Business
Dean School of Law
Dean School of Education
Where are We Going? Vision - 2015

William & Mary will continue to be one of the world's great liberal arts universities.

Already a university of compelling academic distinction, the College will expand its interdisciplinary study, global relevance, and faculty-student research, as well as lifelong ties with alumni.

Our students come wanting to change the world and will leave with the tools to do it.
Where are We Going?
Strategic Plan - 2015

- Be a leader among liberal arts universities.
- Build and support a more fully diverse W&M community.
- Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.
- Implement a new financial model that can fund our aspirations.
- Provide the administrative resources and infrastructure required for a university in the 21st century.
- Explain and promote W&M through a more effective communications structure and strategy.
How Do YOU Get Involved?

<table>
<thead>
<tr>
<th>Governance Assemblies</th>
<th>Affinity Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Staff Assembly</td>
<td>• Women’s Network</td>
</tr>
<tr>
<td>• Professional/Professional Faculty Assembly</td>
<td>• WMEquality</td>
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<tr>
<td>• Faculty Assembly</td>
<td>• Librarians Assembly</td>
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Policies

- **Code of Ethics**
  - Integrity is a core value
  - Treat other people with dignity and respect

- **Discrimination and Harassment**
  - W&M and VIMS = a safe working environment
  - Workplace Resources panel available to answer questions
Training Resources for Employees

- Office of Training and Development
  - Needs Assessment
  - Course Catalog (and under development)
  - Employee Training Calendar
  - Learning Center

http://www.wm.edu/offices/hr/training/index.php
Students at W&M

COLLEGE ORIENTATION
Who are our students?

**Undergraduate** (~5,900)
- From all 50 states and 40+ countries
- 26% students of color
- Best and brightest—79% of freshmen graduated in top 10% of their high school class
- Motivated to succeed

**Graduate** (~2,000)
- Arts & Sciences
- Business
- Education
- Law
- Marine Science
Fun Facts

• 75% of undergraduate students live on campus
• Most popular majors: Government, English, and Psychology
• 45% of undergrads worked for pay in 2009-2010.
• Approximately 700 students study abroad each year.
• 91% say they would recommend W&M to others like them.
What makes the W&M experience unique?

- **Liberal Arts curriculum**
  - 40+ undergrad majors in A&S, Business, and Education, or students can design their own
  - General education and major requirements ensure both breadth and depth
  - Freshman seminars

- **Three pillars of a W&M undergraduate education:**
  - Community engagement
  - Global education
  - Undergraduate research
Tradition & Innovation

- Culture of service (75% of students volunteer)
- Self-determination in the residence halls
- Honor code
- Student involvement in College-wide decision-making
  - Student Assembly, College committees
- Events and celebrations
  - Convocation, Yule Log, Charter Day, Commencement, others
**Tradition & Innovation**

- Learning extends far beyond the traditional classroom:
  - Student-faculty research
  - Living-learning communities
  - Leadership programs
  - International study & service trips
  - W&M in Washington Program
  - ROTC
Individuals Matter

- Students are not just “a number” here
- Individual attention in matters of academics, personal growth, career preparation, counseling
- Commitment to diversity
- Student-to-student support
Involvement is Embraced

- Over **400** recognized student organizations!
- Athletics & recreational sports
- Leadership experiences
- Close relationships with faculty, staff and peers
Student Resources

Academic
- Dean of Undergraduate Studies
- Academic Advising
- Registrar
- Department chairs & program directors
- Reves Center for International Studies
- Charles Center (honors & undergraduate research)

Student Affairs
- Dean of Students
- Career Center
- Counseling Center
- Health Center
- Recreational Sports
- Center for Student Diversity
- Residence Life
- Student Activities
- Community Engagement
- Sadler & Campus Centers
YOUR Impact on Students

- No matter where you work, you are part of an educational community. By observing and interacting with staff, students can learn:
  - Courtesy
  - Responsibility
  - Respect
  - Integrity
  - “Real-world” skills

- Staff are a valuable part of the learning environment!
  - Mentors
  - Role models
  - Supervisors
  - Caring, friendly faces
  - Resources
Where do you fit in?

- Know that **what you do makes a difference** in the lives and the educational experiences of students.
- If you are concerned about a student or have questions about the student experience at W&M, contact us!
  - Academic issues: Dean of Undergraduate Studies
  - Non-academic issues: Vice President for Student Affairs
- Take advantage of campus-wide programming and events!
- Ask us about facility use and technology services for departmental events.
- We aim to build a strong sense of community on campus for students, faculty, and staff.

Welcome to William and Mary!
Working with you!

- Know that what you do makes a difference in the lives and the educational experiences of students
- We can provide advice and counsel on student matters
- Campus-wide programming and event opportunities – take advantage!
- Facility use and technology assistance for departmental events
- Student Affairs helps support a strong sense of community on campus for students, faculty, and staff.

Welcome to William and Mary!
Welcome – Financial Operations

- **Financial Operations includes**
  - **Mission**
    - Responsible for providing comprehensive Accounting, Bursar and Payroll services in support of the College's primary mission of education, research and public service.
  - **Departments**
    - ARMICS
    - Accounts Payable
    - Cashiering
    - Data Control
    - Disbursements
    - Financial Reporting
    - Payroll
    - Receivables and Collections
    - Student Accounts
    - Tax Accounting

Our website
http://www.wm.edu/offices/financialoperations
Financial Operations – Accounts Payable

- Accounts Payable
  - Responsible for ensuring that vendors supplying goods and services to the College are paid in a manner consistent with the Commonwealth of Virginia's Accounting Policies and Procedures.
    - Travel planner - a Step by step guide
    - Moving & Relocation – copy of the regulations
  - Accounts Payable Forms – Forms and Instructions

Our website
http://www.wm.edu/offices/financialoperations
Financial Operations – ARMICS & Cashiering

• Cashiering
  ○ The Cashiering department is responsible for receipting and depositing funds for the College and VIMS in a manner consistent with the guidelines established by the State Treasurer's Office and the Code of Virginia.
    ▪ Forms – Deposit Transmittal, Petty Cash Forms

• Disbursement
  ○ The Disbursement department is responsible for the printing of vendor checks, payroll checks, direct deposit statements, manual checks and tax forms. Disbursement is also responsible for processing stop payments, void checks, sales tax, and salary and travel advances.

Our website
http://www.wm.edu/offices/financialoperations
• Payroll
  ○ The Payroll department is responsible for processing salary and wage payments for all College employees, ensuring that payroll taxes are reported and deposited in a manner consistent with state and federal policies and procedures.
  ○ Non-Resident Alien Payment Processing
    ▪ Forms and Instructions

• Student Accounts
  ○ Responsible for the issuance of student billings for tuition, fees, meal plans, rent and other associated charges. The department is also responsible for the processing of student refunds.
    ▪ Forms
    ▪ Tuition and Fees

Our website
http://www.wm.edu/offices/financialoperations
Financial Operations – Accounts Receivable and Student Accounts

Accounts Receivable & Collections Department

- Responsible for the disbursement and collection of Perkins Loans, and Student Emergency Loans; the collection of delinquent Library Fines, Health Center Bills, Sorority/Fraternity charges, and Tuition charges; approving employee Travel Advances; and reconciling the College's bank accounts.

Our website
http://www.wm.edu/offices/financialoperations
Financial Operations - Training

• Communications from Financial Operations
  ○ Digest Announcement
  ○ List Serv
  ○ Direct e-mailing
  ○ Staff emails
  ○ Website
  ○ Policy Updates

• One-on-One Training
  ○ If you hold a Fiscal position within your department – you need to make an appointment with Ruth Gilliam for an expanded overview of services and one-on-one training regarding the financial operations requirements.

Our website
http://www.wm.edu/offices/financialoperations
Financial Operations – Contact Us

Financial Operations

- Director: Bert Brummer 1-1218
  - Ruth Gilliam: Asst Director Operations 1-4573
  - Sherree Walker: Asst Director of Financial Reporting 1-2834
  - Cindi Fellows: ARMICS Officer and Tax Accountant 1-2497
  - Pam Johnston: BURSAR 1-1219

- Cheryl K Jenkins: AP Mgr 1-2838
- VACANT: Payroll Mgr 1-2844
- Jackie Carter: Disbursements 1-2829
- Sharon Mikanowicz: AR Mgr 1-7697
- Linda Nicely: Cashier Mgr 1-1228
- Sherry Berry-Foster: Data Control Mgr 1-2835
- Janet Balentine: ERP Analyst 1-2827

For additional team members please see our website.
Welcome to Procurement

PRESENTED BY
THE OFFICE OF PROCUREMENT
COLLEGE OF WILLIAM & MARY

http://www.wm.edu/offices/procurement/index.php
What is Procurement?

- All functions that pertain to obtaining goods, services, or construction... including contract administration and payment

- Purchasing
  - Buying goods or services
  - Manage purchasing process
  - Manage Central Copy

- Property Control
  - Inventory control
  - Surplus Property
WHO? The Procurement Staff

- Nan Rowe – Acting Director, SWAM
- Sherrene Moore - Senior Procurement Officer
- Sandra Eatmon - Senior Procurement Officer
- Kathy Mabe – Senior Procurement Officer
- Gary Hundley - Senior Procurement Officer
- Lynnette Jenkins – eVA Trainer
- Nina Earle – Receptionist
Role of Procurement Office

• Ensure that procurements are conducted in accordance with Code of Virginia & Rules Governing Procurement for Restructured Institutions

• Provide electronic Virginia Training (eVA), Procurement 101 and Small Purchase Charge Card Training for all applicable users
Role of Procurement Office

Monitor procurement transactions to ensure that:

- Internal procedures are followed (example: no order splitting, end users do not exceed their delegated authority, mandatory contracts are utilized, and only the Procurement office signs agreements and contracts)

- Procurement transactions are properly documented through Procurement Reviews of department files
YOU – The End User’s Role

• Identify needs – WHAT do you need to buy?

• Purchase goods and services using:
  • Procurement method that is within your delegation up to $5,000.
  • Or through Bids issued by the Office of Procurement
Procurement Regulatory Requirements
Policies & Procedures

- eVA - Electronic VIRGINIA
  - One stop shopping for Virginia government
  - Most purchase orders must be processed in eVA
  - All vendors who accept purchase orders must register in eVA.
    - The College will pay a penalty for each order with a non-eVA registered vendor.
  - eVA training - Lynnette Jenkins (All VIMS employees required to attend eVA)
### Sources of Supply

- Contracts
- Furniture
- Writing Instruments
- Cleaning Supplies
- Printing
- Technology Products/Telecommunications
- State/VASCUPP
- Virginia Correctional Enterprises (VCE)
- Department for the Blind and Vision Impaired (VIB)
- Virginia Distribution Center
- W&M Copy Center or Virginia Correctional Enterprise (VCE)
- VA Information Technology Agency-Information (VITA)
Sources of Supply

Waivers

- A waiver must be obtained to purchase items from another source other than the mandatory/preferred source.

- Contact Office of Procurement for direction on waivers.
Property Control

- All purchased tangible items that cost $2,000 or more must be reported to Property Control Office

- Property Control will send an agent to tag all tangible items

- Disposal of any property must go through Property Control Office
WHO? Property Control Staff

- Scott Polk, Property Control Manager
- Annette Washington, Property Control Supervisor
- Debbie Acheson, Property Control Analyst
- Faith Smith, Property Control Analyst
Standards of Conduct

When **YOU**
- select the vendor on your requisition
- use your Small Purchasing Card to purchase

**YOU** become the **BUYER**

Which means **YOU** must **NOT**
- Solicit
- Demand
- Accept
- Agree to accept
  - from a bidder, offeror, contractor or subcontractor a payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value unless consideration of substantially equal or greater value is exchanged...
Standards of Conduct

- The willful violation of any portion of the Ethics Section of the Code of VA constitutes a Class 1 misdemeanor.

- Upon conviction, any public employee shall forfeit his/her employment.

**For additional information concerning the Standards of Conduct, please contact the Office of Procurement.**