

2016

University of Wisconsin-Madison

# Financial Forum

February 10, 2016

12:30 p.m. - 4:00 p.m.

Gordon Dining and Event Center

Concerto and Sonata Rooms

A Progress Report  
of the Financial Internal Controls Initiative



*Contributing to the Wisconsin Idea through Financial Responsibility*

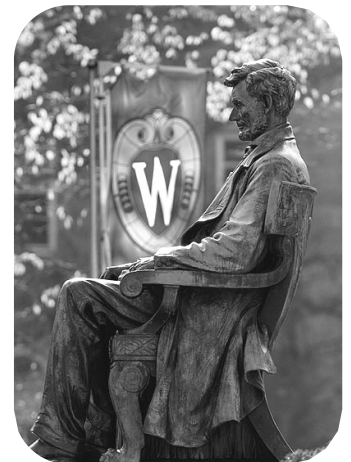
# 2016 UW-Madison Financial Forum

## Agenda

- |                        |  |
|------------------------|--|
| 12:30 p.m. - 1:00 p.m. | <b>Registration and Networking</b>   |
| 1:00 p.m. - 1:15 p.m.  | <b>Welcome and Opening Remarks</b><br>Darrell Bazzell, Vice Chancellor for Finance and Administration  |
| 1:15 p.m. - 2:00 p.m.  | <b>Initiative Overview and Update</b><br>Martha Kerner, CPA, Assistant Vice Chancellor for Business Services   |
| 2:00 p.m. - 2:15 p.m.  | <b>Preview of Team Posters</b> <ul style="list-style-type: none"><li>◆ Financial Information Management &amp; Financial Reporting Team</li><li>◆ Cash Handling, Receipts &amp; Deposits Team</li><li>◆ Revenue Team</li><li>◆ Internal Billing Team</li><li>◆ Procure to Pay Team</li><li>◆ Inventory Team</li><li>◆ Capital Equipment Implementation Team</li></ul> |
| 2:15 p.m. - 2:30 p.m.  | <b>Break</b>   |
| 2:30 p.m. - 4:00 p.m.  | <b>Gallery Walk</b>  |

## Note

This event qualifies certified public accountants for CPE credits (one credit per hour). If you would like a certificate of attendance, please complete the form in your program and drop it off at the registration table when you leave.



# Process & Implementation Teams

## Financial Information Management & Financial Reporting Team

Natalie Feggstad, SoHE  
 Matt Griffith, Business Services  
 Donna Halleran, Auxiliary Oper. Analysis  
 Tammie Hodgson, DoIT  
 Arnie Jennerman, UHS  
 Martha Kerner,\* Business Services  
 Steve Kuhn,\* Business Services  
 Dan Langer, Business Services  
 Mari Ann Ménager, APR  
 Ken Mount, SMPH  
 Tim Norris, Madison Budget Office  
 Ed Rodriguez, SVM  
 Amy Wilson, Business Services

## Internal Billing Team

Mary Bauer, SMPH  
 Katie Chase, DoIT  
 Sally Hansen, FP&M  
 Steve Kuhn, Business Services  
 Susie Maloney, Business Services  
 Randy Marnocha,\* Business Services  
 Bridget Montour, RSP  
 Jane Oberdorf, Wiscsonsin Union  
 Gerry Pelanek, APR  
 Jeanne Rotter, SMPH  
 Toby Schellhase, School of Education  
 Andy Taylor, DoIT

## Capital Equipment Implementation Team

Janet DesChenes, APR  
 Sandy Fowler, CALS  
 Matt Griffith, Business Services  
 Tammie Hodgson, DoIT  
 Carl Johnson, SMPH  
 Janel Oster, FP&M  
 Carla Parker, Business Services  
 Gerry Pelanek,\* APR  
 Colleen Reilly, DoIT  
 Mehdi Rezai, L&S  
 Melissa Steinl, SSEC  
 Matt Thies, Business Services

## Cash Handling, Receipts & Deposits Team

Tim Delaney, Wisconsin Union  
 Brian Diebling, SMPH  
 Matt Griffith, Business Services  
 Mike Halton, Business Services  
 John Harvey, University Housing  
 Camille Hogan, SMPH  
 Mario Morris, Athletics  
 Angie Seitler,\* CALS  
 Colleen Sims, DoIT  
 Jim Thompson, APR

## Procure to Pay Team

Dave Brinkmeier, Business Services  
 Angie Erickson, University Housing  
 Kevin Galles, SMPH  
 Liv Goff, Business Services  
 Matt Griffith, Business Services  
 Chris Gunter, WSLH  
 Alice Gustafson, APR  
 Rusty Haines, Business Services  
 Meredith Luschen, SMPH  
 Mari Ann Ménager, APR  
 Kerry Morgan, Business Services  
 Dave Nelson,\* Business Services  
 Don Schwoerer, FP&M

## Capital Equipment Phase I Team (DMAIC and Recommendations)

Kris Ackerbauer, FP&M  
 Sandy Fowler, CALS  
 Matt Griffith, Business Services  
 Brenden Hedberg, Business Services  
 Tammie Hodgson, DoIT  
 Carl Johnson, SMPH  
 Steve Kuhn,\* Business Services  
 Dennis Manthey, College of Engineering  
 Karen Mier, SVM  
 Hartley Murray, Business Services  
 Nick Novak, VCRGE  
 Janel Oster, FP&M  
 Gerry Pelanek, APR  
 Colleen Reilly, DoIT  
 Mehdi Rezai, L&S  
 Kathleen Sielaff (Wernigg), RSP  
 Matt Thies, Business Services  
 Jim Thompson, APR  
 Jim Walker,\* School of Business

## Revenue Team

Bob Bolles, University Housing  
 Ann Bourque, Madison Budget Office  
 Jose Carus, Business Services  
 Katie Chase, DoIT  
 Susan Dahmen, SVM  
 Jim Franzone, University Housing  
 Cristi Fusch, RSP  
 Alice Gustafson, APR  
 Amy Johnson,\* SMPH  
 Fariba Kiani, Business Services  
 Steve Kuhn, Business Services  
 Randy Marnocha, Business Services  
 Debi Morgan, L&S  
 Ron Ravel,\* SMPH  
 Jonathan Wolf, School of Business

## Inventory Team

Nick Gullick, FP&M  
 Brian Hutchinson,\* Business Services  
 Steve Kuhn, Business Services  
 Dan Purcell, Business Services  
 Mary Beth Roberts, L&S  
 Troy Suski, Wisconsin Union  
 Diane TeBeau, DoIT  
 Jim Thompson, APR  
 Holly Yan, University Housing  
 Jeff Zebrowski, FP&M

\* = Team Leader

# 2016 UW-Madison Financial Forum

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The Vice Chancellor for Finance and Administration  
Division of Business Services

**UW-Madison Financial Internal Controls Initiative**

For news and updates, visit:

[bussvc.wisc.edu/internalcontrols](http://bussvc.wisc.edu/internalcontrols)