



## IUC Annual Shared Services Summit April 25, 2019

Ohio Farm Bureau 4-H Center (OSU)  
2201 Fred Taylor Drive  
Columbus, OH 43221

- 9:00 a.m.      **Registration, Coffee, Vendor Showcase (AB Graham Hall)**
- 10:00 a.m.      **Welcome and Opening (Bob Evans Memorial Auditorium)**
- *Bruce Johnson, President, Inter-University Council of Ohio*
  - *Chancellor Randy Gardner, Ohio Department of Higher Education*
- 10:30 a.m.      **IUC Purchasing Group and IUC Risk Management Insurance Consortium Updates**  
*Jennifer March-Wackers, Executive Director, IUC-PG*  
*Elizabeth Conlin, Director, IUC RMIC*
- 11:00 a.m.      **Featured Presentation**  
**Collaborating Across the Generational Divide**  
*Jean Demchak*  
*Managing Director, Leader, Education & Public Entity at Marsh, Inc.*
- Noon              **Lunch (Club Room, seating in Bob Evans Memorial Auditorium)**  
**Vendor Showcase and Networking (AB Graham Hall)**
- 1:15 p.m.      **Breakout Sessions**
- Breakout 1 (Gehres Room 214):**  
**Shared Services Highlight: IUC Records Retention Tool**  
*Pari J. Swift, MLIS, CRM, University Records Manager, The Ohio State University*  
The IUC Records Retention schedule, a standardized records management tool that has been adopted and adapted by all IUC-member universities, has been housed at OSU Archives since 1992. However, big changes, which will revolutionize the way in which institutions develop, manage and produce retention schedules, are coming! Pari Swift, OSU University Records Manager, will give an overview of the new Zasio Versatile Retention Software program that OSU and IUC members will implement this year, which will greatly enhance the current retention schedule. Many value-add features will be available to address institutional compliance needs such as public records management, privacy, e-discovery, and cyber security all of which will serve to increase operational efficiencies.

**Breakout 2 (Eastman Room 100):**

**Shared Services Highlight: Cammack 403(b)**

*Moderators: Joey Payne, Cammack Retirement*

*Jeffrey Levy, Cammack Retirement*

*Panelists: Elizabeth Aumann, University of Cincinnati*

*Sandy Heck, Bowling Green State University*

*Malonda Johnson, Shawnee State University*

*Karen Wilson, Miami University*

In this breakout session, a moderator will lead a panel of member institution experts who will describe their experience in the review of current practices related to employee retirement plans. Members will share efforts to date, recommendations and practices being considered, and how challenges encountered might be addressed.

**Breakout 3 (International Room 110):**

**Shared Services Highlight: Kent State University and Youngstown State University**

**Database Partnership**

*John Rathje, CIO, Kent State University*

*James Yukech, CIO, Youngstown State University*

Kent State University and Youngstown State University IT leadership will share their story of collaboration, which led to a shared services agreement for Database services.

2:00 p.m.

**BREAK**

2:15 pm.

**Breakout Sessions**

**Breakout 1 (Gehres Room 214):**

**Digital Flagship – A Student Success Initiative**

*Jessica Phillips, Associate Director of Student Experience for Digital Flagship, The Ohio State University*

Digital Flagship is a comprehensive, university-wide digital learning initiative to support educational innovation for students and economic development opportunities for the community. Digital Flagship isn't a technology or device initiative, it is a student success initiative to blend learning technology throughout the university experience and increase student engagement and learning transformation — both inside and outside the classroom. This session will focus on why and how the university is implementing this initiative to drive student academic success while at Ohio State and preparing students for career success after graduation.

**Breakout 2 (Eastman Room 100):**

**Cyber Security and Breaches**

*Moderator: Martin Leicht, Marsh Cyber Center of Excellence*

*Panelists: Mark Beadles, OARnet*

*John Ellinger, Bowling Green State University*

*Bogdan Vykhovanyuk, University of Cincinnati*

*Chuck Warner, Shawnee State University*

In this breakout session, a moderator will share examples of industry losses and lessons learned and then lead a panel of member institution IT security leaders who will share their experiences.

**Breakout 3 (International Room 110):**

**Shared Services Highlight: Travel Management Services with IUC-PG**

*Phil Worley, Director of Business Operations, Bowling Green State University*

*Diana McGrew, Director of Purchasing, Ohio University*

In this breakout session, a panel of member institution experts will describe their success with the IUC-PG Travel Management Services price agreement. Participants will be provided with examples of process efficiencies and savings generated by engaging with a travel management company contracted with the IUC Purchasing Group.

**3:00 p.m. BREAK**

**3:15 p.m. Summit Wrap-Up and Next Steps (Bob Evans Memorial Auditorium)**

**Stronger Together – Doing More with Less through Collaboration**

*Moderator: Chuck Warner, CIO, Shawnee State University*

Panel Discussion:

IUC Business and Finance Officer Committee

IUC Chief Information Officer Committee

IUC Human Resources Committee

IUC Purchasing Group

IUC Risk Management Insurance Consortium

**4:00 p.m. Adjourn**

**Thank you for attending the 2019 IUC Shared Services Summit!  
Please remember to turn in your Summit surveys at the Registration Desk!**