Ethical Principles and Code of Conduct Opinion

Opinion Number: 1001-2016

Issued: September 15, 2016

Issue

Whether or not a staff employee, who presented at an Information Technology-related Conference hosted by the University of Louisville and sponsored by a vendor which does business with the University of Kentucky, may keep for his personal use a \$500 gift card that he received for making the "Outstanding Presentation" at the Conference. Whether or not the staff employee's acceptance and use of the \$500 gift card for personal use would be a violation of the Ethical Principles and Code of Conduct (Governing Regulation XIV.B.IO., 14., or 18.)? See Attachment A.

Facts

UK staff employee Brett McDaniel, Manager in Information Technology, specifically in Academic Technology Group, attended the Blue Americas Conference at the University of Louisville and won a \$500 Amazon gift card for the "Best Presentation" award.

Details for the trip are as follows:

- Attended the conference Tuesday August 2nd and Friday August 5th, 2016.
- UKAT paid for \$179.00 on registration fees for the conference.
- UKAT paid \$518.85 for hotel accommodations (Aug/2/16NAug/4/16).
- McDaniel presented, along with 3 other speakers, at the conference on Thursday August 4th at 12:45pm.
- UKAT reimbursed McDaniel for vehicle mileage round trip to Louisville and for meals not provided at the conference.
 - Roundtrip to Louisville from Hardymon building is \$85.64 for mileage.
 - Total meals not provided and to be reimbursed \$80.
 - \$13 for Breakfast on Tuesday August 2nd.
 - \$26 for Dinner on Tuesday August 2nd.
 - o \$26 for Dinner on Wednesday August 3rd.
 - o \$15 for Lunch on Friday August 5th.

Documents with details on the travel are attached. See Attachment B.

BLUE Software, LLC is a privately owned software company headquartered in Chicago with offices in London and Singapore. "Blue" is a graphics process management technology developed specifically for brand packaging graphics and artwork.

In 2013-14 fiscal year, UK purchased a "tool" from Blue. The tool cost \$175,000 and has an annual maintenance fee of \$44,000. Mr. McDaniel is the primary application person with the Blue tool. Mr. McDaniel was not on the Selection Committee when the decision was made to purchase this product. However, as the primary user, it would likely be that Mr. McDaniel will be a decision-maker involved with continuing use of the Blue product or any future bid (RFP) for such a product. Blue was the corporate sponsor of the Blue Americas Conference at U of L. As corporate sponsor of the Conference, Blue gave away \$30,000 worth of prizes to attendees at this Conference.

Opinion

The University Ethics Committee concluded that the \$500 gift card was a gift of over \$200 under Ethical Principles and Code of Conduct Section B.18.; such a gift belongs to the University and an employee is prohibited from accepting such. Further, the Committee concluded that acceptance and personal use of such a gift from a present vendor of the University would create an appearance of a conflict between private interests and obligations to the University and an appearance of an impropriety that should be avoided.

Rationale / Discussion

In the discussions of the Committee, there were two theories that were discussed. The first theory was that Mr. McDaniel worked, made an outstanding presentation, and received this gift certificate as a performance bonus, like some employees in the UK Healthcare enterprise receive bonuses. Thus, GR XIV does not apply, and the gift certificate belongs to Mr. McDaniel for him to do with as he pleases. After discussions, this theory was rejected and the second theory was adopted by the Committee as its official opinion.

The second theory was that the gift certificate is just that, a gift. As a gift of over \$200, it is governed by GR XIV and the gift certificate belongs to the University. This conference was not a national professional organization meeting or seminar. This conference was a corporate-sponsored activity for promotion of its products. The corporate sponsor, Blue, (a UK vendor) gave away \$30,000 in prizes. The Committee believed that a corporation giving away \$30,000 at a conference is a sales promotion. While noted as "gifts," the Committee concluded that these gifts were incentives for recipients to do business with Blue. It was the opinion of the Committee that these gift certificates are "implicit" attempts to influence. Thus, the Committee believed that this situation falls within the prohibition against accepting gifts that are intended as "implicit" influences that may result (exchanged for) in favor (to a vendor). Therefore, the Committee believes that the gift belongs to the University and should be forwarded to the Office of the Treasurer.

It was noted that no one on the Committee knows Mr. McDaniel personally; this opinion is not intended to imply that Mr. McDaniel would be influenced by the \$500 gift certificate. The Committee has no reason to believe that he would do anything that is not in the best interest of the University; the Committee does, however, believe that this situation falls under GR XIV.B.18 and thus the gift belongs to the University. The Committee applauds Mr. McDaniel for checking with his supervisor and informing the appropriate University official of this gift.

Recommended Course of Action

The Committee believes that the head of Information Technology could request that the \$500 be given to the IT office to pay the expenses that IT paid toward Mr. McDaniel attending the conference or be used in some other manner that benefits the department or the employees of the department. It would be a decision of the Treasurer as to exactly where the funds go.

Members of the Ethics Committee

Jeff Bieber, Professor, College of Education and University Senate Representative Kakhil Baker, Director, Martin Luther King Center

David Melanson, Chief Compliance Officer, UK HealthCare CAER Associate Director, Staff Senate Representative

Brett Short, Chief Compliance Officer, UK HealthCare

Jack Supplee, Director, Administrative & Fiscal Affairs, Office of the Vice President for Research, Associate Director & Secretary for UK Research Foundation

C: Eli Capilouto, President Tim Tracy, Provost
Eric N. Monday, Executive Vice President for Finance and Administration
Kim Wilson, Associate Vice President for Human Resources
Bill Harris, Executive Director of Purchasing
Karen Willmott, Interim Chief Information Officer
Joe Reed, Senior Director, Internal Audit

Kim Wilson, Associate Vice President for Human Resources

ATTACHMENT A

Governing Regulation XIV.B.

10. Conflict of Interest

The public's respect and confidence in the University of Kentucky must be preserved. Confidence in the University of Kentucky is put at risk when the conduct of University members does, or may reasonably appear to, involve a conflict between private interests and obligations to the University. All University members shall avoid conduct that might in any way lead members of the general public to conclude that he or she is using an official position to further professional or private interests or the interests of any members of his or her family. In conducting or participating in any transaction, full disclosure of any real or perceived conflict with personal interests and removal from further participation in such matters is required.

AR 7:2, Research Conflict of Interest and Financial Disclosure Policy, sets forth specific relationships and activities that pose a potential conflict of interest for faculty, staff, and students involved in research and related activities. The University recognizes that actual or potential conflicts of interest may occur in the normal conduct of research and other activities. A conflict of interest can also arise if an employee's professional judgment is or may appear to be influenced by personal interests. It is essential that potential conflicts be disclosed and reviewed by the University. After disclosure, the University can make an informed judgment about a particular activity and require appropriate oversight, limitations, or prohibitions in accord with this policy. It is important to remember that each relationship is different, and many factors often will need to be considered to determine whether a conflict of interest exists.

14. Financial Advantage

Members of the University community shall exhibit personal integrity, honesty and responsibility in all actions. Official position or office shall not be used to obtain financial gain or benefits for oneself or members of one's family or business associates. Any action that creates the appearance of impropriety should be avoided. Except as specifically approved by the Board, purchases and contracts shall not be made with an employee of the University for any item of supply, equipment, or service, nor may an employee have any interest, directly or indirectly, in any purchase made by the University . (See BPM B.2.C, KRS 164.131, and KRS 164.367.) An indirect interest may be defined as a real or perceived use of a university position or office with respect to a purchase or contract, leading to financial or other benefits to the individual or a member of his or her family. An indirect interest includes situations where a

business owned or controlled by a family member does business with the University area where the employee is assigned.

18. Acceptance of Gifts or Benefits

University members' decisions and actions shall be based on the best interest of the University. No member shall accept any type of reward, monetary or non-monetary, if there is an explicit or implicit assumption that influence has been exchanged for the favor.

When no favor is asked for or gained, gifts of nominal value or moderate acts of hospitality, such as meals, in relation to one's position or activities with the University may be accepted. The following limits shall be observed:

- a. Gifts or acts of hospitality valued up to \$50 annually from any one source need not be reported.
- b. Gifts or acts of hospitality valued between \$50 to \$200 should be reported to the supervisor prior to acceptance.
- c. Acts of hospitality above \$200 must be specifically justified and reported through the chain of command. Written approval for acceptance must be provided by the Provost or executive vice president, in advance.
- d. Individuals may not accept gifts valued above \$200. However, these gifts or benefits shall be directed to the Executive Vice President for Finance and Administration, where they can be acknowledged and accepted on behalf of the University.

Attachment B

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AAA Corporate Travel/UK 323-5354 "Concur/Trip Manager Help Desk 1-877-463-0543

ACCOUNTS PAYABLE: 257-1402

5/23

Lorrie Caird, Account Clerk Travel 257-5437

TRAVEL WORKSHEET

Pro-Card Cover Sheet#
Traveler: Brett Mc Naniel
Dates of Travel Tue, Aug 3 - Fiv, Aug 5, 2016
Contact# Office/CellPI#
Event: Blue Americas Conference 2016
Location Locusarillo, Ky
Cost Center: 1013208380
* APPROVAL EMAIL FROM: P. COLLECTION (phone#)
Traveler: Combining Personal with Business Travel Valid airfare cost comparison / expenses paid using "Personal Funds" (airfare)
Meals Per Diem Daily Rate \$ Breakfast \$ Lunch \$ Dinner \$
Expenses on Credit Card # 12 3674 Issued to: D. Taylon
L_I Airline Tickets (secured by Office/or employee)
Motor Pool UK Office 257-3119
Motor Vehicle Record (MVR) Release & Information Form (on-File)
Rental Vehicle/approved
Ground Transportation (example, SuperShuttle)
Registration/Conference/Training/Meeting/Misc.
Hotel Hotel: Credit Card Authorization Form / Fax Date: 8/1//
TRAVEL VOUCHER # A 8 TWO 75514
Travel Voucher: prepared & delivered to AP: Date
Notes

Campus Peo	ple Directory Search Result
Search auto Y	for brett mcdaniel FANDIEC for — OPTIONAL SECOND FIELD TO RESTRICT SEARCH
There was one n	natch to your search.
Brett McDanie	<u>ગ</u>
Email Title Department Address City Phone Fullname	brett.mcdaniel@uky.edu Information Technology Manager I Academic Technology Group 211B McVey Hall 40506-0045 Lexington 859 257-8263 Brett McDaniel
update your entry	ems for more information. • <u>Read about</u> the campus directory and how you can e records flagged as <u>private</u> generally will not be found by searching this directory.

Taylor, Debora

From:

McDaniel, Brett (Use for email) Monday, May 23, 2016 3:52 PM

Sent: To:

Taylor, Debora

Subject:

FW: Blue Americas 2016 Event registration

Here is the registration.

Brett

From: Becky Patterson [mailto:blueamericas@bluenotesgroup.com]

Sent: Monday, May 23, 2016 3:33 PM

To: McDaniel, Brett (Use for email)

brett.mcdaniel@uky.edu>

Subject: Blue Americas 2016 Event registration

Thank you for registering for the Blue Americas 2016 Event. Your registration is now complete.

Payment can be processed by clicking the following link: http://www.eventbrite.com/e/blue-americas-2016-conference-tickets-19023342329 or by contacting Becky Patterson (becky.patterson@louisville.edu) directly.

10:15 AM to 12:00 PM: Learning Experience Management (Led by

We look forward to seeing you at the event!

eXplorance) [5 seats remaining]:	No
8:00 AW to 9:45 AM : Workshop #1 [7 seats remaining] :	No
10:15 AM to 12:00 PM: Workshop #2 [4 seats remaining] :	No
1:00 PM to 2:45 PM : Workshop #3 [6 seats remaining] :	No No
3:15 PM to 5:00 PM : Workshop #4 [7 seats remaining] :	No
Prefix:	Mr
First name (*):	Brett
Middle name:	
Last name (*):	McDaniel
Mobile/cell phone:	
Email (*):	brett.mcdaniel@uky.edu
Email can be included:	Yes
Institution/Affiliation (*):	University of Kentucky
Unit/Department:	Information Technology
Title (*):	IT Manager
Year began this position:	2010
I plan to attend the Dinner:	Yes

Have a good day!

Dietary Restrictions:

None ()

Taylor, Debora

From: Sent:

Eventbrite <orders@eventbrite.com> Monday, May 23, 2016 3:39 PM Taylor, Debora

To:

Subject: Attachments:

Your Tickets for Blue Americas 2016 Conference

19023342329-520963868-ticket.pdf

Hi Debora, this is your order confirmation for Blue Americas 2016 Conference

Organized by University of Louisville

Here are your tickets



Paper Tickets

Open the email attachment or download here





Questions about this event?

Contact the organizer at uoflirp@louisville.edu

Order Summary

May 23, 2016

Order #: 520963868

Name Type Quantity Price

Debora Taylor Regular Registration 2 \$358.00

TOTAL

\$358.00

Charged to: Visa - XXXX-XXXXXX-3674

This charge will appear on your card statement as EB *Blue Americas 2016

This order is subject to Eventbrite Terms of Service, Privacy Policy, and Cookie Policy

About this event

- Tuesday, August 2, 2016 at 8:00 AM Friday, August 5, 2016 at 11:30 AM (EDT)
- 7) The Brown Hotel 335 West Broadway Louisville, KY 40202
- Add to my calendar:

 Google · Outlook · iCal ·

 Yahoo





Your Account

Log in to access tickets and manage your orders.

Create your own event Anyone can sell tickets or manage registration with Eventbrite



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bluenotes

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BLUENOTES AMERICAS 2016 CONFERENCE PROGRAM

Putting the Pieces Together:
Using Assessment Data to
Shape the Future

August 3, August 4, and August 5

#blueAPAC2016
#blueEMEA2016
#bluecertification

#blueamericas2016

#bluenotesgrp

#bluepulse
#bluetextanalytics



Pre-conference Events

August 2:

- > Thought Leadership Roundtables
- ➤ Workshops
- > Welcome Reception

The Brown Hotel 335 W Broadway Louisville, Kentucky 40202



CONFERENCE PROGRAMI



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Keynote Speaker: Wednesday, August 3

Mr. Scott Jaschik



Mr. Scott Jaschik is editor and one of the three founders of Inside Higher Ed. With Doug Lederman, he leads the editorial operations of Inside Higher Ed, overseeing news content, opinion pieces, career advice, blogs and other features. Scott is a leading voice on higher education Issues, quoted regularly in publications nationwide, and publishing articles on colleges in publications such as The New York Times, The Boston Globe, The Washington Post, Salon, and elsewhere. He has been a judge or screener for the National Magazine Awards, the Online Journalism Awards, the Folio Editorial Excellence Awards, and the Education Writers Association Awards. Scott served as a mentor in the community college fellowship program of the Hechinger Institute on Education and the Media, of Teachers College, Columbia University. He is a member of the board of the Education Writers Association. From 1999-2003, Scott was editor of The Chronicle of Higher Education. Scott grew up in Rochester, N.Y., and graduated from Cornell University in 1985. He lives in Washington.

Keynote Speaker: Thursday, August 4

Glenda Morgan, Ph.D.



Glenda Morgan is a Research Director in Gartner Research, where her area is higher education technology strategies, including learning management systems and platforms, learning analytics, adaptive learning, and classroom technologies.

Prior to Joining Gartner, Dr. Morgan had over 20 years of experience in higher education, including as a faculty member and most recently leading the Academic Technologies unit at the University of Illinois at Urbana-Champaign. She has extensive experience not only in leading strategic planning and governance initiatives but also in conducting research on technology use among students and faculty for organizations such as Educause and the National Science Foundation (US). She is currently collaborating with Gartner colleague Terri-Lynn Thayer and staff from Educause on a research study on analytics in higher education.

Invited Speaker: Mr. Anthony Whyte Thursday, August 4

Anthony Whyte is a member of Team Caliper and holds a staff appointment at the University of Michigan. Between 2004-2012 he was seconded to the open-source Sakai and OAE projects, serving in a variety of community, technical and leadership roles. In 2013 he "returned home" in order to focus on campus initiatives that leverage technology in the service of teaching and learning. During the fall of that year he began contributing in earnest to IMS Global's Caliper learning analytics initiative. A former Fulbright scholar, Anthony was educated at Michigan State University and Princeton University.



BLUENOTES AMERICAS 2016 CONFERENCE PROGRAM







Unique Opportunities: Speak with eXplorance Staff

Mayor processors and the control	Unique Opportunities: Speak with explorance Staff
	Wednesday, August 3: 9:15 AM to 4:30 PM
"I need help"	Support station: Arturo Morales. Customer Support Engineer Sarah el Kadri, Software Support Engineer
"I have feedback"	Product Management station: Long Hua, Chief Product Officer Zelbrey Bedard (Zel), VP. Blue Product Management Robert Wood, Bluepulse Product Manager
"I want to learn more"	Demo station: Maurice Ryder, Product Knowledge Base Manager Rola Al-Ghoul, Manager, Project Success
Blue Evaluation Center	Francols Beneteau; Sales Engineering Manager
	Thursday, August 4: 9:15 AM to 5:15 PM
"I need help"	Support station: Arturo Morales. Customer Support Engineer Sarah el Kadri, Software Support Engineer
"I have feedback"	Product Management station: Long Hua, Chief Product Officer Zelbrey Bedard (Zel), VP Blue Product Management Robert Wood, Bluepulse Product Manager
"I want to learn more".	Demo station: Maurice Ryder, Product Knowledge Base Manager Rola Al-Ghoul, Manager, Project Success
Blue Evaluation Center	Francols Beneteau, Sales Englneering Manager
	Friday, August 5: 8:30 AM to 10:45 AM
"I need help"	Support station: Arturo Morales. Customer Support Engineer Sarah el Kadri, Software Support Engineer
"I have feedback"	Product Management station: Long Hua, Chief Product Officen Zelbrey Bedard (Zel), VP Blue Product Management Robert Wood, Bluepulse Product Manager
"I want to learn more"	Demo station: Maurice Ryder, Product Knowledge Base Manager Rola Al-Ghoul, Manager, Project Success
Blue Evaluation Center	Francols Bëneteau, Sales Engineering Manager

BLUENOTES AMERICAS 2016 CONFERENCE PROGRAM





Tuesday, August 2, 2016

Thought Leadership Roundtables and Workshops

8:00 AM to 9:45 AM	Thought Leadership Roundtable: Strategies for Increasing student response rates a engagement in course evaluations Moderator: Bob Goldstein, University of Louisville	nnd Secretariat A
8:00 AM to 9:45 AM	Workshop: Delegating Evaluation Management Instructors: Maurice Ryder and Rola Al-Ghoul	Secretariat B
9:45 AM to 10:15 AM	Morning Break	
10:15 AM to Noon	Thought Leadership Roundtable: Learning Experience Management (LEM) in Action LEM look like at my institution? Moderator: Tim Brennan, eXplorance	secretariat A
10:15 AM to Noon	Workshop: Extending Blue — A Look at Some of the Complementary Tools Available Explorance Instructors: Maurice Ryder and Rola Al-Ghoul	le from Secretariat B
Noon to 1:00 PM	Lunch Secretariat B	
1:00 PM to 2:45 PM	Thought Leadership Roundtable: The future of Bluepulse to support continuous in teaching and learning Moderator: Krisy Mahome, Indiana University Bloomington	nprovement in Secretariat A
1:00 PM to 2:45 PM	Workshop: Reporting—Telling the Evaluation Story Instructors: Maurice Ryder and Rola Al-Ghoul	Secretariat B
2:45 PM to 3:15 PM	Afternoon Break	
3:15 PM to 5:00 PM	Thought Leadership Roundtable: evalUT course evaluation framework for formation Moderator: Cherie Werhun, University of Toronto	ve assessments Secretariat A
3:15 PM to 5:00 PM	Workshop: Tips and Tricks – Ways and Means of Making Blue Talk Instructors: Maurice Ryder and Rola Al-Ghoul	Secretariat B
6:00 PM to 8:00 PM	Opening Night Reception	luegrass Room







COMPERENCE PROGRAM

Wednesday, August 3, 2016

7:30 AM to 8:15 AM	Registration/Continental Breakfast Mezzanine/Crystal Ballro	om/South Alcove
	Welcome/Introduction to Conference Becky Patterson, University of Louisville	
8:15 AM to 9:15 AM	s produced and a second as second and a second a second and a second a	
ž.	Keynote Address: A New Era of Scrutiny for Higher Education Speaker: Scott Jaschik, editor, <i>Inside Higher Ed</i>	Crystal Ballroom
9:15 AM to 9:45 AM	Morning Break – Group Picture at 9:40 AM Crystal Ballroom	
	Individual Session: eXplorance Updates and Roadmap	
9:45 AM to 10:45 AM	Presenter: Samer Saab, eXplorance	Crystal Ballroom
	Theme: general	
10:45 AM to 11:00 AM	Presentation of Blue Certifications Presenter: Samer Saab, eXplorance	Crystal Ballroom
	Individual Session: Engaging Students for Success with Bluepulse® - Indiana Univ Bloomington Use Case Study	versity
	Presenter: Krisy Mahome, Indiana University Bloomington Theme: analytics	Broadwa y A
11:00 AM to 11:50 AM	Individual Session: How Blue Provides Targeted Course Evaluation Support with Presenter: Long Hua, eXplorance Theme: general	QBank Broadway B
	Individual Session: Expanding Use of Blue Text Analytics Presenters: Becky Patterson, Arnold Hook, Bob Goldstein, University of Louisville Theme: response rate	Broadway C
	Individual Session: TBD	
	Presenter: TBD Theme:	Crystal Ballroom
Noon to 1:00 PM	Lunch Crystal Ballroom	
	Individual Session: Using Blue Course Evaluations to Enhance Teaching and Learn University	ning at a Large
	Presenter: Howard Mzumara, Indiana University-Purdue University Indianapolis Theme: operational	Broadway A
1:00 PM to 1:50 PM		
	Individual Session: Implementing evalUT at Simon Fraser University	
	Presenter: Corinne Pitre-Hayes, Simon Fraser University	Broadway B
	Theme: operational	
	Individual Session: Discover the New Blue SIS Integration Packages	



(COMPERENCE PROCESSAM)



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	Presenter: Long Hua, eXplorance Theme: analytics	Broadway C
	Individual Session: TBD Presenter: TBD Theme: TBD	Crystal Ballroom
	Individual Session: The Many Uses of Blue Survey Presenters: Shari Barrow and Lisa Horn, University of Louisville Theme: operational	Broadway A
	Individual Session: Welcome to Bluepulse 2.0 Presenter: Robert Wood, explorance Theme: analytics	Broadway B
2:00 PM to 2:50 PM	Individual Session: Keeping Focus: Managing Student Instructional Feedback P	rocesses Through
	Institutional Change Presenter: Thomas Dohm, University of Minnesota Theme: general	Broadway C
	Individual Session: Implementing Blue 360 for Medical Evaluations at the Amer Beirut Presenter: TBD; American University of Beirut Theme: general	ican University of Crystal Ballroom
3:00 PM to 3:30 PM	Afternoon Break – 1 st drawing for door prizes Crystal Ballroom	
	Individual Session: DIG: Struggles and Successes using the DIG tool for data ma Presenters: Peggy Collins and Joshua Yeldel, Washington State University Theme: analytics	nagement Broadway A
	Individual Session: Leveraging Blue for All Your Multi-Rater Evaluation Needs Presenter: Samer Saab, eXplorance Theme: general	Broadway B
3:30 PM to 4:20 PM	Individual Session: Using a Central Installation of Blue in a Decentralized Enviro Presenters: Rob Nelson and Janet Lind, University of Pennsylvania Theme: operational	nment Broadway C
	Individual Session: TBD	Crystal Ballroom









CONFERENCE PROGRAM

Thursday, August 4, 2016

7:45 AM to 8:15 AM	Continental Breakfast Crystal Ballro	oom/South Alcove
8:15 AM to 9:15 AM	Keynote Address: The data driven revolution and student success Speaker: Glenda Morgan Ph.D., Gartner	Crystal Ballroom
9:15 AM to 9:45 AM	Morning Break	
	Individual Session: TBD Presenter: Larry Williams, Oregon Health Sciences University Theme: operational	Broadway A
	Individual Session: Grade Pathways Presenters: Becky Patterson and Bob Goldstein, University of Louisville Theme: response rate	Broadway B
9:45 AM to 10:35 AM	Individual Session: Getting the Most Out of Blue Reports – Think About Your Da Presenter: Daniel Glover, University of Minnesota Theme: operational	itabase First Broadway C
	Individual Session: How Does Blue Integrate with Your Enterprise Application Ed Presenter: Samer Saab, eXplorance Theme: general	cosystem? Crystal Ballroom
	Individual Session: Tropical Blue: The "Down Under" experience of embedding evaluation data into business intelligence and curriculum improvement Presenter: Dan Zamykal, James Cook University Theme: general	student Broadway A
	Individual Session: Unveiling the New Blue Dashboard Presenters: Raphael Gera and Zelbrey Bedard (Zel), eXplorance Theme: analytics	Broadway B
10:45 AM to 11:35 AM	Panel Discussion: Building Custom Reports in Blue Moderator: Carissa Shafto; Galen College of Nursing Panelists: TBD Theme: operational	Broadway C
	Individual Session: Response rates: demographic determinism Presenters: William McManus and Deborah Bolton Stagg, University of Pennsylva Theme: response rate	inia Crystal Ballroom
11:45 AM to 12:45 PM	Lunch Crystal Ballroom	
12:45 PM to 1:35 PM	Individual Session: TBD Presenter: Karen Seach; Duquesne University Theme: operational	Broadwa y A

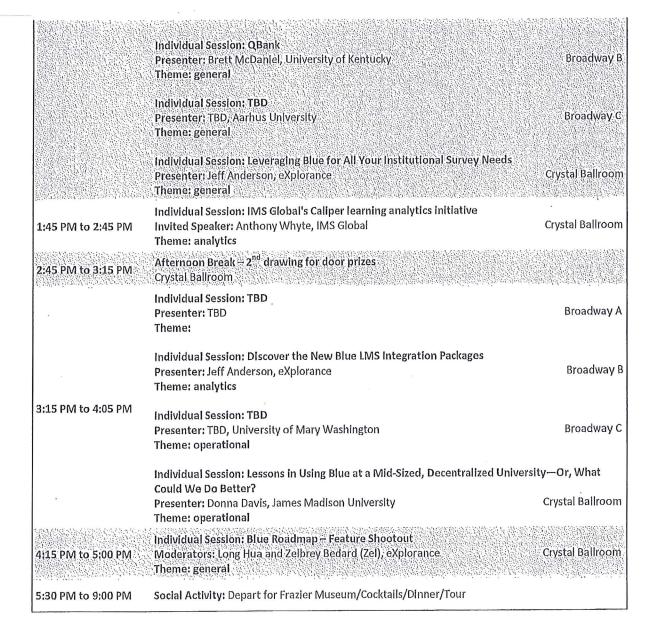


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UNIVERSITY OF LOUISVILLE







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Friday, August 5, 2016

8:00 AM to 8:30 AM	Continental Breakfast Presentation of Best Presentation and Best New Presenter Awards Presenter: Samer Saab, eXplorance Crystal Ballroo	m/South Alcove
	Individual Session: What's Next with Blue UI/UX? Presenters: Chelliah Moorthy (Mo) and Wenzhuo Zhang, eXplorance Theme: general	Broadway A
8:30 AM to 9:30 AM	Individual Session: Geeking out with Blue – Advanced (and sometimes quirky) tip Presenter: Francois Beneteau, eXplorance Theme: operational	s and tricks Broadway B
	Individual Session: Get the Most Value out of Blue with the LEM Certification Fram Presenter: Fernando Sanchez Villalobos, eXplorance Theme: general	nework Broadway C
9:30 AM to 9:45 AM	Morning Break – 3 rd drawing for door prizes Crystal Ballroom	
9;45 AM to 10;35 AM	Panel Discussion: Ask An eXpert Moderator: Shari Barrow, University of Louisville Panelists: C Theme: operational	rystal Ballroom
10:45 AM to 11:15 AM	Closing Ceremony	



Taylor, Debora

From: Sent: To: Cc: Subject:

Witmott, Karen Monday, May 16, 2018 3:21 PM Cruse, Kelloy M Taylor, Debora PW: Bluenctes Americas; Early Bird Registration End's Scont Register Today to Save 34%

Kelley,

Please have both work with Debora to register.

Thanks,

Karen

From: Carruthers, Patsy
Sent: Monday, May 145, 2016 3:10 PM
To: Cruse, Kelley M <kelley.cruse@uky.edu>; Gold, Dlana D <dlana.gold@uky.edu>
Cr: Willmott, Karen <karen.vallmott@uky.edu>
Subject: RE: Bluenotes Americas: Early Bird Registration Ends Sooni Register Today to Save 34%

Kelley,

I endorse this, and Karen has approved. Let's have Brett and Jim go ahead and register.

-Patsy

From: Cruse, Kelley M Sent: Monday, May 16, 2016 2:31 PM To: Carruthers, Patsy Subject: FW: Bluenotes Americas: Early Bird Registration Ends Soonl Register Today to Save 34%

Hi Patsy,

Sorry, I am going through my to do list today.

What are your thoughts on sending Brett and Jim to this conference in August?

Thanks,

Kelley

From: McDaniel, Brett (Use for email) Sent: Monday, April 11, 2016 9:33 AM
To: Cruse, Kelley M < kelley.cruse@uky.edu>

Cc: Lindsay, Jim D. <<u>idlind2@uky.edu</u>>
Subject: FW: Bluenotes Americas: Early Bird Registration Ends Soonl Register Today to Save 34%

As you can see below the deadline for the Bluenotes Americas 2016 conference Early Bird pricing, \$119, is May 18. The regular price is \$179. The hotel discount ends on July 1. The conference is August 2 - August 4.

The link to the conference is cilck here.

I am not sure how to handle this with everything that is going on.

Thanks,

From: <u>becky.patterson@louisville.edu (mailto:becky.patterson@louisville.edu)</u>
Sent: Monday, April 11, 2016 8:38 AM
To: McDanle, Brett (Use for email) <u>Shrett.mcdanle@uky.edu</u>>
Subject: RE: Bluenotes Americas: Early Bird Registration Ends Soonl Register Today to Save 34%

Hello, Brett.

Thanks for the note. Glad to hear that you and Jim may be able to attend!

The Early Bird registration ends on May 18. @

We are still in need of presenters! If you can present on the Question Bank, that would be great. This is one of the topics we do not have a presentation about yet. All we would need is the title of the presentation, name of the presenter(s), and a brief description for the conference program.

I hope you have a good week.

Thanks so much.

Becky Patterson
Executive Director
Office of Institutional Research and Planning
University of Institutional Research
MIC 205
Louisville, KY 40292
Phone: (502) 852-3335
Fox: (502) 852-2344
http://poduxille.edu/oapa/Institutional-research-and-planning

Tell us how we are doing! The OAPA Client Salisfaction Survey is available at: https://blueeval.louisville.edu/CE/aaspx?l=644 1 AAAAAAAAFEÇ

Ficere swimit ell deto requests et: http://houbrisia.edu/earo/fortifut/enal-tesearch-and-planels/data-tequest-firm-1

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From: McDanlel, Brett (Use for email) [mailto:brett.mcdanlel@uky.edu]
Sent: Monday, April 11, 2016 6:22 AM
To: becky.patterson@butscile.edu
Subject: RE: Bluenotes Americas: Early Brd Registration Ends Sconl Register Today to Save 34%

Hi Becky,

When does the early bird registration end? We are dealing with some turnover and budget issues and I need to let the management know when we need to get the registrations in. I think both Jim and I will be attending again this year.

Do you still need presenters? Ithlink I am ready to do a presentation on the Question Bank if you still need a presentation. Let me know and I can fill out an official presentation submission.

Thanks.

Brett

From: <u>hecky.natterson@louisville.edu (mailto:hecky.patterson@louisville.edu)</u>
Sent: Saturday, April 03, 2016 9:09 PM
To: McDanlel, Brett (Use for emall) hectt.mcdan'el@uky.edu
Subject: Bluenotes Americas: Early Bird Registration Ends Sooni Register Today to Save 34%

Now is the time to take advantage of the early bird price of \$119 by registering today for the <u>Bluenotes Americas</u>

Why attend this year's event? Attendees will experience the unique opportunity of hearing two renowned keynote speakers. Mr. Scott Jaschik, editor, Inside Higher Ed, will address the various sources of scrutiny (both fair and unfair) and how colleges are responding. Dr. Glenda Morgan, Research Director, Gartner, Inc., will talk about the data driven revolution and student success, including the role that assessment and evaluation data play in improving student

In addition to these two keynote addresses, attendees will network with coileagues, hear conference presentations by over 15 différent Institutions, learn about the roadmap of features in upcoming releases, see product demonstrations, and much, much more! Many first-time presenters will lead conference sessions this year. The topics for this year's sessions focus on conceptual frameworks of administering surveys and course evaluations in general as well as how Blue has been implemented at specific institutions. So, whether your role is that of a "hands-on" Blue project manager or you are responsible for administrative oversight of university assessments, this year's conference will feature sessions for you! Over 70 of your colleagues have registered for the Bluenotes Americas conference. Will you join them to support the growing Bluenotes Community today?

Some of the institutions that will have representation at this year's conference include:

- American University
- American University of Belrut (first-time presenter)
- Bellarmine University

 Duquesne University (first-time presenter)
- Eastern Kentucky University
- Fox Valley Technical College
 Galen College of Nursing (will lead a panel discussion)

- Indiana University Bloomington (first-time presenter)
 Indiana University-Purdue University Columbus
 Indiana University-Purdue University Indianapolis (first-time presenter)
- James Cook University (first-time presenter)
 James Madison University (first-time presenter)
 Oregon Health Sciences University (first-time presenter)
- Stonehill College
- University of Alberta
 University of Mary Washington (first-time presenter)
- University of Louisville University of Maryland College Park University of Minnesota

- University of Nebraska at Omaha University of Pennsylvania Washington State University
- West Virginia University
- William Paterson University Zayed University

You will not want to miss the pre-conference workshops and Thought Leadership Roundtables on Tuesday, August 2. Indicate your wish to participate in these events during the conference registration process.

Don't delay and register today! To view all conference information, travel approval forms, details on the \$30,000 conference prizes, special hotel reservation rates and more, <u>dick here</u> (<u>bluenotessroput, com/home, asyntibluenmericas2016</u>). Please note that a tentative conference program is posted for your review under "Event Program".

To ensure the special rate at the Brown Hotel of \$153/per night (plus tax) is received, rooms must be reserved by no later than July 1, 2016.

As you consider travel arrangements, please note that the conference is scheduled to end by 11:30 AM on Friday, August

We look forward to seeing you in August!

Becky S. Patterson Executive Director
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