

From: Inform-c07
To: [Inform-C07 \(Professional Faculty\)](#); [Inform-C11 \(Office Managers, Executive Assistants, Administrative Assistants\)](#); [Inform-C02 \(Top Administrators - Academic & Research\)](#); [Inform-C03 \(Top Administrators - Administration\)](#)
Subject: [Inform-c07] Update on DFA Business Operations Project
Date: Thursday, August 16, 2018 10:55:38 AM
Attachments: [PP Univ Community Exec. Summary-08.13.2018.pdf](#)



**Oregon State
University**

Finance & Administration
Mike Green

Colleagues,

Last year I engaged consultants from Baker Tilly to conduct a comprehensive review of university business operations (including Business Affairs, Business Centers and the office of Budget and Resource Planning) and their interactions with units across the university. This review was conducted to help DFA leaders improve internal processes and better align resources and services with the needs of the university community.

I am pleased to report that a Business Operations Core Project Team, led by project manager Heather Riney and overseen by an executive steering committee, has developed a high-level [project plan and model](#), which will be used to guide the work as we move forward. An executive summary of the project is attached for your convenience.

As we begin this broad, multi-year project, we invite you to attend one of the [project framework communication sessions](#) presented by the Core Project Team. They will provide an overview of the plan, and allow time for question and input. My office and the Core Project Team are committed to collaborating with stakeholders across the university community in a transparent, supportive and flexible manner.

Thank you for your support of the Business Operations Project. This work is important to the ongoing success of OSU, and we are committed to collaborating with you and your teams in a transparent, supportive and flexible manner. Please feel free to reach out to me or Heather Riney with any comments or questions.

Thank you,
Mike Green

Office of the Vice President
Division of Finance and Administration
Oregon State University
640 Kerr Administration Building
Corvallis, OR 97331
Ph: 541-737-2447



OSU Business Operations Project *Executive Summary*

Background

In summer 2017 Mike Green, Vice President of Finance and Administration, coordinated with the Office of Audit Services to establish an oversight committee (Committee) for a review of business operations at Oregon State. The Committee engaged a consulting firm, Baker Tilly, to conduct a comprehensive review of the university's business operations including Business Affairs, Business Centers, and the Office of Budget and Fiscal Planning, as well as their interactions with units across the university (Business Operations). This review was conducted recognizing the need to improve internal processes, balance service levels and workloads, and provide better forecasting and consultation to administrators.

Baker Tilly conducted 35 interviews and focus groups to collect input and concerns from people across the university community: vice presidents, vice provosts, deans and directors; faculty and department heads; departmental end users; and managers and staff from the relevant business operations groups. They reviewed a wide range of documentation, such as policies and procedures, position descriptions and organizational charts, and performance metrics. Baker Tilly also conducted analysis and benchmarking of key business areas against peer university and industry best practices. Leaders from the business operations units were included at all points of the consultation and review process. Baker Tilly issued their final report at the end of December 2017.

Challenges

The Baker Tilly report identified challenges and provided recommendations to address: employee roles and responsibilities; communication of a clear vision and strategy; employee morale and fatigue; service approaches; financial reporting, forecasting and budget monitoring; policies, practices and processes; use of technology; approach to process change; and oversight and accountability. For additional information and detail, please see the [OSU Business Operations Best Practices Report](#)

Objectives

Implementation of the Business Operations Project will address the 10 challenges and supporting recommendations brought forward in the review (including organizational structure changes to move the direct reporting lines of the Business Centers to the Controller and the establishment of an IT Advisory Committee). This work will support the following objectives allowing the university to:

- Develop and implement business operations roles, responsibilities policies and processes to fulfill the Division of Finance and Administration (DFA) Framework for Success to support the business needs and strategic plan for the University. These elements will progress through project development and extend throughout the continuous improvement and evaluation process.
- Improve responsiveness, effectiveness of business and financial management, and alignment of resources with strategic priorities.
- Create new partnerships and increase collaboration.
- Streamline the management of critical business operations groups.

- Develop actions that enable appropriate risk mitigation in business decisions and activities.
- Convene stakeholders and experts from across the division and university to identify opportunities and challenges, while developing and supporting strategic, creative and collaborative solutions.
- Build and allow flexibility into the Project to ensure we are continually addressing projects and initiatives that provide effective solutions with long-term sustainability, and high quality impact.

Engaging the University Community

Transparency, honesty and continuous feedback are critical to the success of the project. Engagement of stakeholders across the university participating in this project will seek to foster complete communication, stay aligned with strategic plans, make and keep commitments with others, be inclusive in bringing people together, bolster university morale, protect others' reputations and demonstrate appreciation. The project team has heard feedback and concerns from the university community and will work with stakeholders and employees to:

- Develop an understanding how work affects others and vice versa.
- Address challenges with change.
- Analyze project plans and return on investment and ensuring resources are allocated to complete projects.
- Ensure there is diversity of thought and continuous improvement.
- Develop policies and projects that provide for ease of use, balanced risk and transformational improvement (without trying to cover every scenario or exception).
- Prioritize projects and teams to address the risks of stagnation, project stalling, and fatigue.
- Be selective about project implementation (and selecting the right people), and addressing concerns associated with constant change or releasing incomplete or premature information.
- Provide extensive but targeted communication that keeps employees engaged and facilitates a long-term change in culture.

Recognizing and building upon the strength of our dedicated, and committed OSU employees in business operations across the university is key. An essential outcome will be to **ensure roles and responsibilities are clearly defined** between college/department personnel, business center personnel and central administration personnel. Finding the right balance between process consistency across the enterprise and meeting unique client needs will be a key consideration in reaching project goals. All of these **support activities need to be focused on those who are served by business operations personnel**. Deviations from university processes will be needed in certain situations and the processes need to make allowances for those situations.

The Core Project Team will **convene stakeholders and experts from across the division and university**, creating committees and teams as appropriate. These work groups will dive deeply into the detailed report to identify specific needs and develop **strategic, creative and collaborative solutions** to challenges, including developing specific timelines and implementation plans for individual projects, and delivering communication updates to stakeholders.

This work will impact every employee of the university at some level and, as such, **engagement is crucial to our success**. Division of Finance and Administration employees and partners will have many opportunities to engage and provide input as subject-matter experts during the life of the project. We ask for your **support, flexibility and creativity** throughout the process.

Please visit [Business Operations Project website](#) for the full project plan and other related information.

