



Oregon State
University

Beaver Works:

Business Excellence Adding Value & Service

Business Operations
Project Plan Information Sessions

August-October 2018



Information Session Agenda

- **Where We've Been**
 - **Background, Challenges, and Objectives**
- Where We Are
 - Project Plan and Engaging the University Community
- Where We're Going
 - Top 3 Priorities (next 8 months) and Project Conceptual Model (2+ years)
- Questions and Discussion



Where We've Been

Background- Mike Green, Vice President of Finance and Administration, coordinated with the Office of Audit Services to establish an oversight committee that engaged a consulting firm, Baker Tilly, to conduct a comprehensive review of the university's business operations.

Challenges- Baker Tilly identified 10 challenges and provided recommendations. More detail can be found in the Baker Tilly Business Operations Best Practices Review.



Where We've Been

Objectives- The Business Operations Project will support the following objectives:

- Develop and implement business operations roles, responsibilities policies and processes to fulfill the Division of Finance and Administration (DFA) Framework for Success
- Improve responsiveness and effectiveness; streamline
- Create new partnerships and increase collaboration
- Develop actions that enable appropriate risk mitigation
- Identify opportunities and challenges; develop and support strategic, creative solutions
- Build and allow flexibility



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Where We Are

Project Plan- The Core Project Team created a high level project plan and presented it to the Executive Steering Committee at the end of June. The full plan is available on the [Business Operations Project Website](#)

Engaging the University Community- The Core Project Team will engage and convene employees and stakeholders throughout the process to gather feedback and create strategic, collaborative solutions. We will do this while supporting one another through:

- Transparency, honesty and continuous feedback
- Recognizing and building upon the strength of our dedicated and committed OSU employees
- Ensuring roles and responsibilities are clearly defined
- Ensure support activities are focused on those who are served by business operations personnel
- Ensuring consistency and flexibility



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Top 3 Priorities

Align Business Operations Efforts to Support and Advance the Division of Finance & Administration Framework for Success that will promote a culture of shared understanding and purpose for employees to use in their daily work, projects and initiatives.

September 2018-April 2019

- Engage the Steering Committee to assess business operations risk tolerances
- Communicate with and engage the university community



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Top 3 Priorities

Build an Innovative and Responsive Organization that aligns business operations structures and resources necessary to meet the current and future needs of the university.

July 2018-January 2019

- Analyze and collate data collected by Baker Tilly
- Conduct a gap analysis
- Identify structures
- Present organizational structure options
- Communicate with and engage the university community



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Top 3 Priorities

Develop Efficient and Effective Operations to strengthen research infrastructure and administration by improving the efficiency and transparency of policies, processes and practices.

September 2018-March 2019

- Determine process re-engineering priorities
- Launch quick win project teams
- Identify long term projects to address business and institutional needs
- Implement and assess project outcomes
- Communicate with and engage the university community



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Questions, and Discussion