

USG Comprehensive Administrative Review (CAR)



Town Hall Sessions
August 7th and 8th

Project Background

USG Board of Regents Chancellor Wrigley announced a system-wide initiative focused on improving administration through

- creating efficiencies,
- streamlining processes and
- finding ways to be more effective with USG resources.

Comprehensive Administrative Review **USG CAR**

April 2017

Why Now?

“Higher education has undergone fundamental changes in who enrolls and why, how instruction is delivered, and how it is paid for. We must ask ourselves: Are we positioned to meet the challenges of today, and are we preparing for those of tomorrow?”

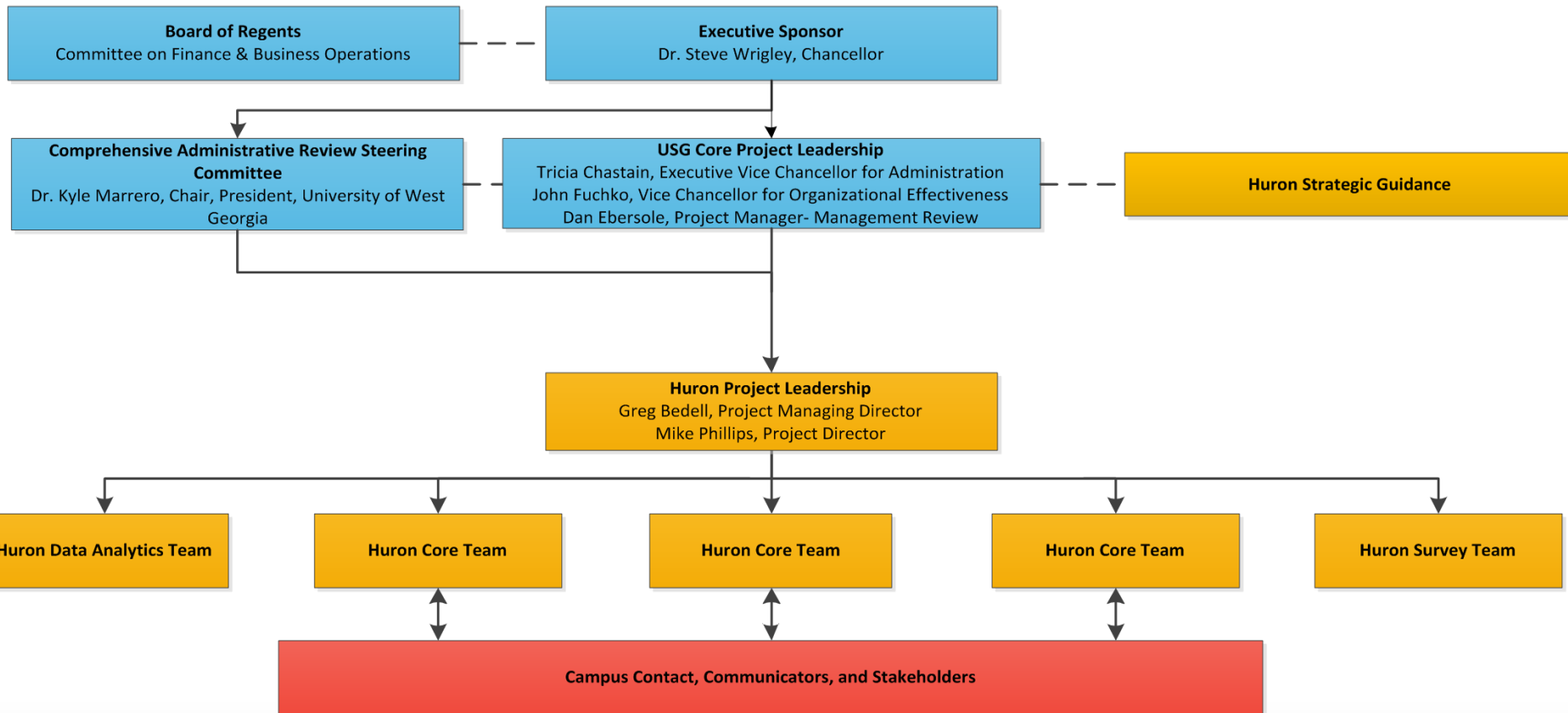
The time is right for the University System to look in the mirror. A comprehensive examination of how the System and the institutions are administered in light of the new realities in higher education will help ensure we are fulfilling our mission today and tomorrow.”

– *Chancellor Steve Wrigley*

USG CAR Objectives

- Develop model organizational structures and processes that **will consistently enhance our ability to further** the teaching, research, and service the **mission** of the University system
- Develop and implement a 21st century operational model in a multi-campus, diverse University system
- Identify recommendations that would enhance administrative effectiveness, efficiency, and execution at all levels of the organization
- Identify administrative cost savings that can be **redirected into the System's core functions** of teaching, research, and service

USG's CAR Steering Committee



Project Information & Background

- Phase I - Fall '17
 - 6 institutions + the USG Offices
- Phase II – Spring '18
 - 20 institutions
 - AU and AU Health are included in second phase
- Huron Consulting Group is supporting the project

Project Timeline – Phase 2 Institutions

Phase II of the CAR project includes the remaining 20 USG institutions and is scheduled to conclude in early 2019. The institutions scheduled from April to August are displayed on the timeline below.

Comprehensive Administrative Review - Phase II Schedule																											
Institution	March '18					April '18				May '18				June '18				July '18				August '18					
	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31
Valdosta State University																											
Georgia Southern University																											
Georgia State																											
Augusta																											
University of Georgia																											
Columbus State University																											
Fort Valley State University																											
Savannah State University																											
Georgia College & State University																											
Georgia Southwestern State University																											
Clayton State University																											
Albany State University																											
Dalton State College																											
Gordon State College																											
College of Coastal Georgia																											

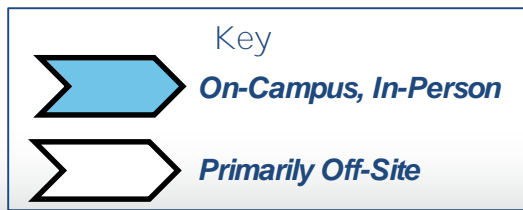
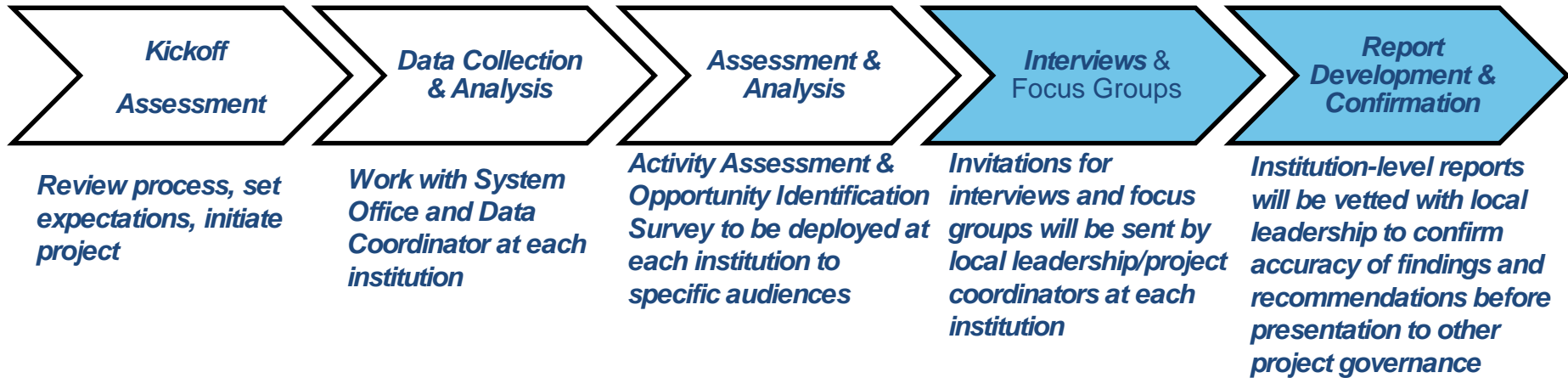
 = Ramp-up, Opportunity Survey, Activity Assessment

 = On-site interviews and focus-groups



Project Approach – Institution Engagement

INSTITUTIONAL ENGAGEMENT PROCESS



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Project Approach – Institution Engagement



- Setup Local Team
- Begin broad communications
- Finalize schedule

AU-CAR Team

Executive Leadership

Executive Sponsor
Dr. Brooks Keel

CAR Steering Team
Executive Cabinet

Project Leader
Beth Brigdon

IE Project Manager
Kristi Lucas

CORE TEAM
Debra Arnold, Beth Brigdon, Michael Casdorff, Greg Damron, Jack Evans, Lee Fruitticher, Holly Goodson, Ashley Lesley, Kristi Lucas, Susan Norton

Data Information Team
Holly Goodson

Report Evaluation Team
Beth Brigdon

Communications Team
Debra Arnold

Project Resources
Huron resources, USG System Office resources

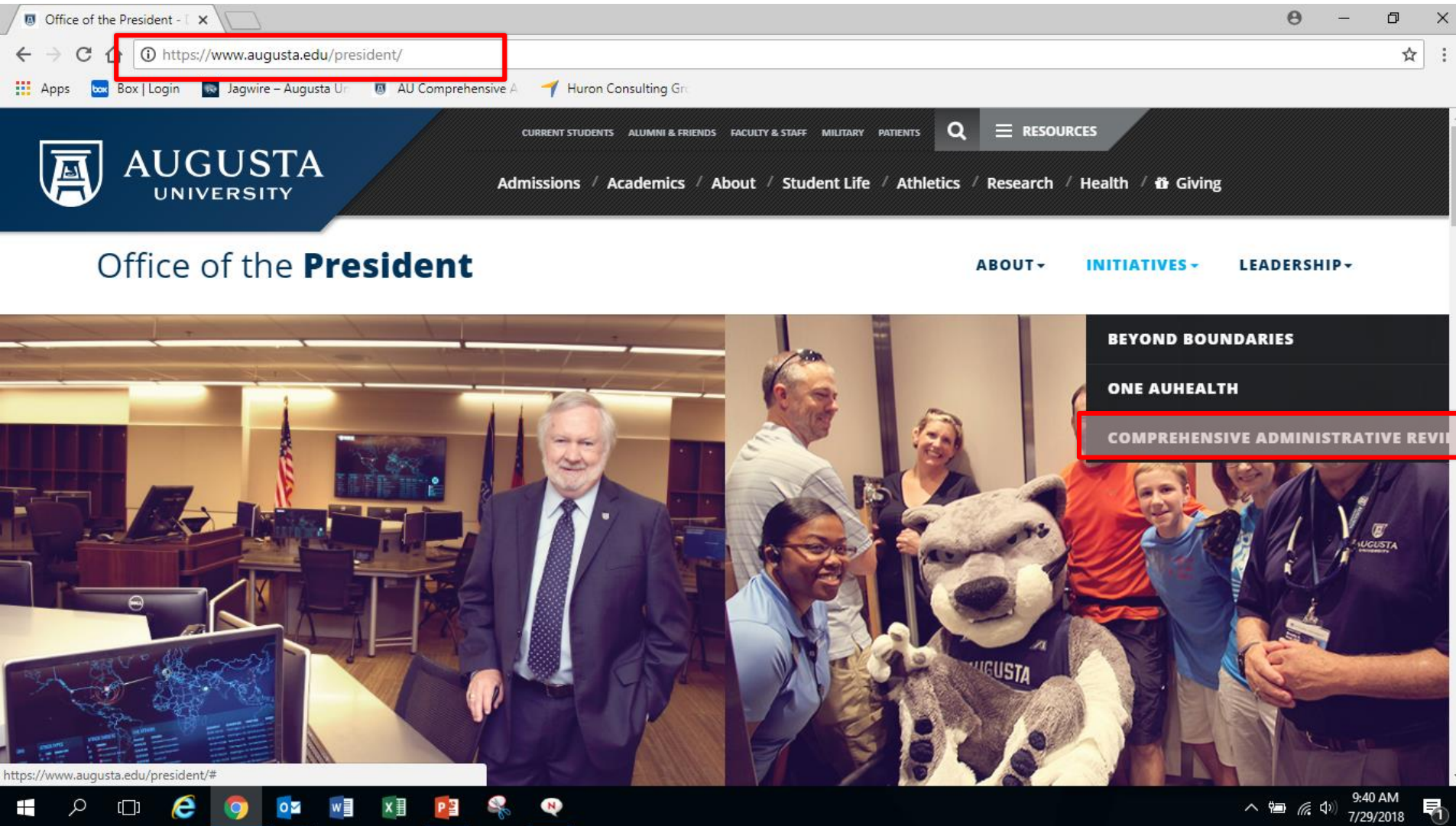
Work Teams

Core Team and Report Evaluation Team

Provide recommendations to the Executive Cabinet that address institutional structural and process changes. These recommendations should 1) address local opportunities identified in the Huron institutional-level report, and 2) incorporate information and insights gleaned from the Huron institutional-level report while not being limited to use of data provided by Huron.

The ultimate purpose of the CAR will be at the forefront for this group's attention, i.e., be able to achieve: 1) redirection of realized savings to direct instruction, patient care, and/or student support services, 2) organizational and/or process improvement resulting in realized savings or sustained operational growth, and 3) realized savings resulting in direct cost reduction to students (tuition or fee reduction).

AU-CAR Website Launched



AU CAR Timeline – Fall 2018

Data Collection
6/20 – 8/15

← July 11 – Official Kick Off with USG Leadership Visit

*Opportunity
Identification Survey*
8/7 – 8/17

*Activity Assessment
Survey*
8/20 – 9/21

Huron Onsite
9/4 – 10/5

*Huron Report to Executive Cabinet
Local Team Reviews/Provides Feedback*
10/18 – 11/8

*Official Report Received & Response
Phase Begins*
11/21

Project Approach – Employee Assessments



Two Employee Surveys (Tailored for AU)

1. Opportunity Identification (Aug 7th – Aug 17th)
2. Activity Assessment
 - Part 1: Employee (Aug 20th – Sept 5th)
 - Part 2: Supervisor (Sept 12th – 21st)

Opportunity Identification Survey



Survey Objectives

Identity Functions

- Best in Class
- Have Room for Improvement

Starts: 8/07/18

Closes: 8/17/18



Survey Participants (~1,000)

- Managers w/ at least 40% admin duties
- Faculty w/ at least 25% administrative duties
- University Faculty Senate
- Employee Advisory Councils
- Student Leaders (SGAs)

Individual responses to the survey will be confidential and presented only in summary.

Opportunity Identification Survey

Individual responses to the survey will be confidential and presented only in summary.

1. Participant background

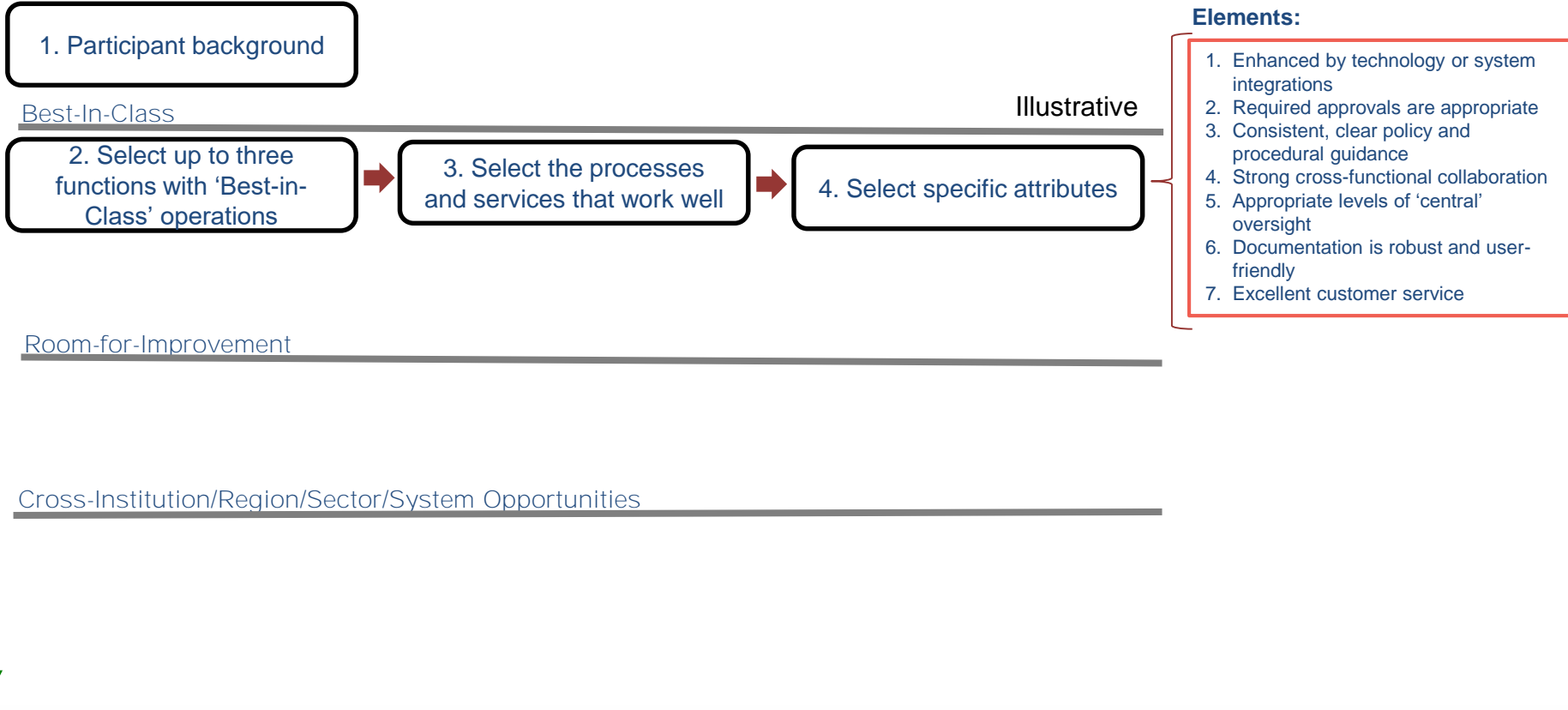
Best-In-Class

Room-for-Improvement

Cross-Institution/Region/Sector/System Opportunities

Opportunity Identification Survey

Individual responses to the survey will be confidential and presented only in summary.



Opportunity Identification - Processes

1. Academic/Clinical Support
2. Senior Administration
3. Auxiliary Services
4. Internal Audit
5. Enrollment Mgt & Financial Aid
6. Facilities, Assets, and Space Management
7. Fiscal/Accounting Operations (Excludes Purchasing, Travel & Revenue Cycle)
8. Health Information Management (HIM)
9. Budget
10. Fundraising, Advancement, & Development
11. Human Resources, Payroll, & Benefits
12. Information Technology
13. Institutional Research & Decision Support
14. Libraries
15. Marketing & Communications
16. Purchasing & Travel
17. Research Administration (Pre/Post Award)
18. Revenue Cycle (Patient Accounting)
19. Safety & Risk Management
20. Patient Access & Care Services
21. Student Life & Services
22. Regulatory, Compliance, and Legal Services
23. Organizational Effectiveness/Improvement
24. Online and Professional Education Program Development and Support
25. Intellectual Property, Partnerships and Economic Development
26. External Relations
27. Other

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4. Internal Aud
5. Enrollment M
6. Facilities, As
Management
7. Fiscal/Accou
Purchasing, Tra
8. Health Inform
9. Budget
10. Fundraising,
Development
11. Human Reso
12. Information
13. Institutional
Support
14. Libraries

Which of the following processes/services listed below align with your 'Best-in-Class' designation? Please select all that apply.

- Evaluate capital plan (construction, deferred maintained, etc.)
- Determine if the APPA level of building service is sufficient
- Tracking deferred maintained needs, costs, and projections
- Tracking use and cost of space
- Requesting services
- Monitoring progress and completion of service requests
- Timely, clear, billing for services provided
- Timely follow-up and resolution for requesting services
- Developing comprehensive plan for capital projects
- Requesting design services

Opportunity Identification - Processes

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Evaluate capital plan (construction, deferred maintained, etc.)

Determine if the APPA level of building service is sufficient

Tracki

1. Enhanced by technology or system integrations

2. Required approvals are appropriate

Tracki

3. Consistent, clear policy and procedural guidance

Reque

4. Strong cross-functional collaboration

Monit

5. Appropriate levels of 'central' oversight

Timely

6. Documentation is robust and user-friendly

Timely

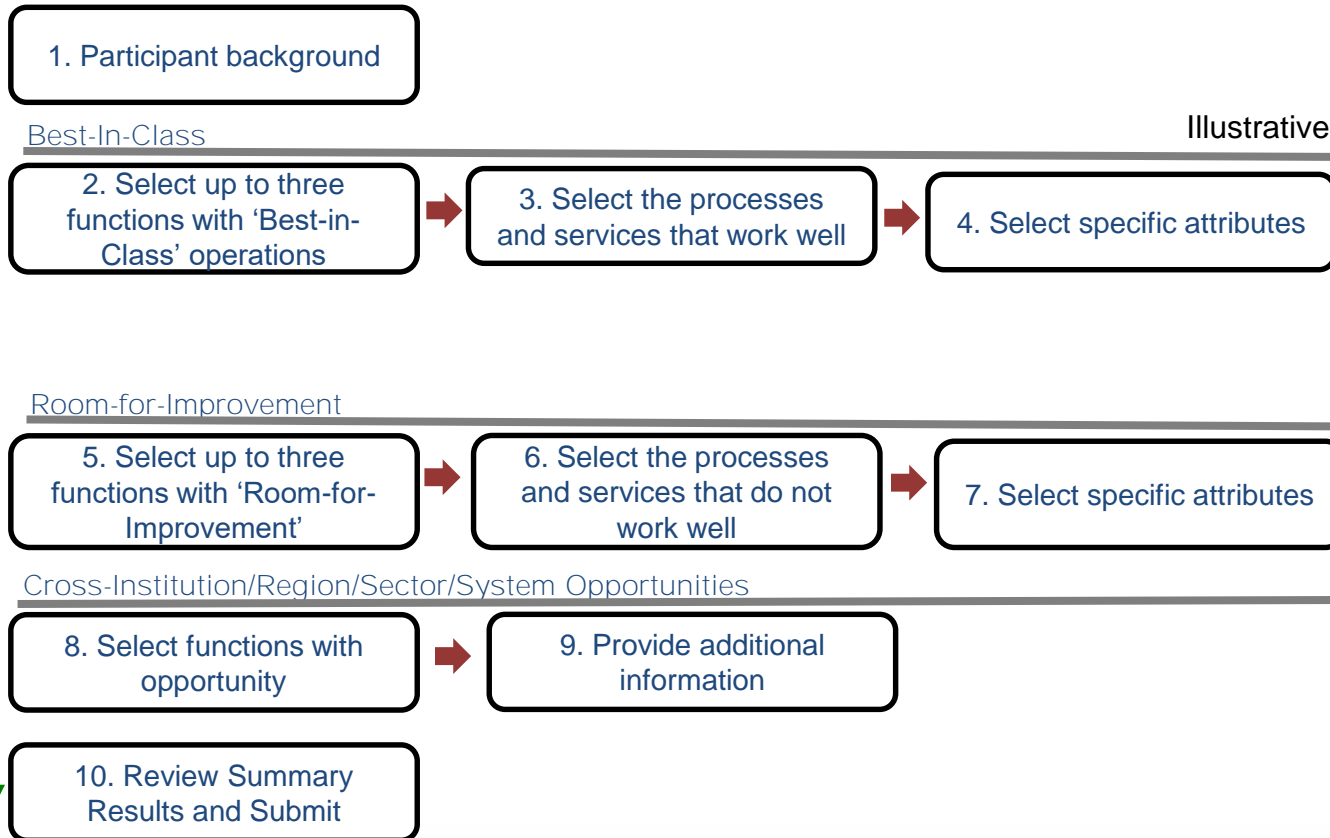
7. Excellent customer service

Developing comprehensive plan for capital projects

Requesting design services

Opportunity Identification Survey

Individual responses to the survey will be confidential and presented only in summary.



Best-In-Class Process Evaluation Elements:

1. Enhanced by technology or system integrations
2. Required approvals are appropriate
3. Consistent, clear policy and procedural guidance
4. Strong cross-functional collaboration
5. Appropriate levels of 'central' oversight
6. Documentation is robust and user-friendly
7. Excellent customer service

Room-For-Improvement Process Evaluation Elements:

1. Lack of technology or system integrations
2. Complicated or inefficient approval process
3. Inconsistent/Unclear policy and procedural guidance (Phone/Email Communications)
4. Barriers to cross-functional collaboration
5. Ineffective 'central' oversight
6. Documentation is limited or not user-friendly
7. Poor customer service

Activity Assessment – 8/20/18 – 9/5/18

Objectives, Participants & Functions

Assessment Objective



- Collect effort (FTE) allocated to in-scope administrative support functions and other activities to support comparative benchmarking and analysis across departments, schools/colleges, and institutions

Audience/Scope



- Huron has worked with AU leadership to ensure that this assessment be taken by individuals with broad administrative duties.
- Those positions with little administrative duty will be excluded from this assessment.

Activity Assessment Functions

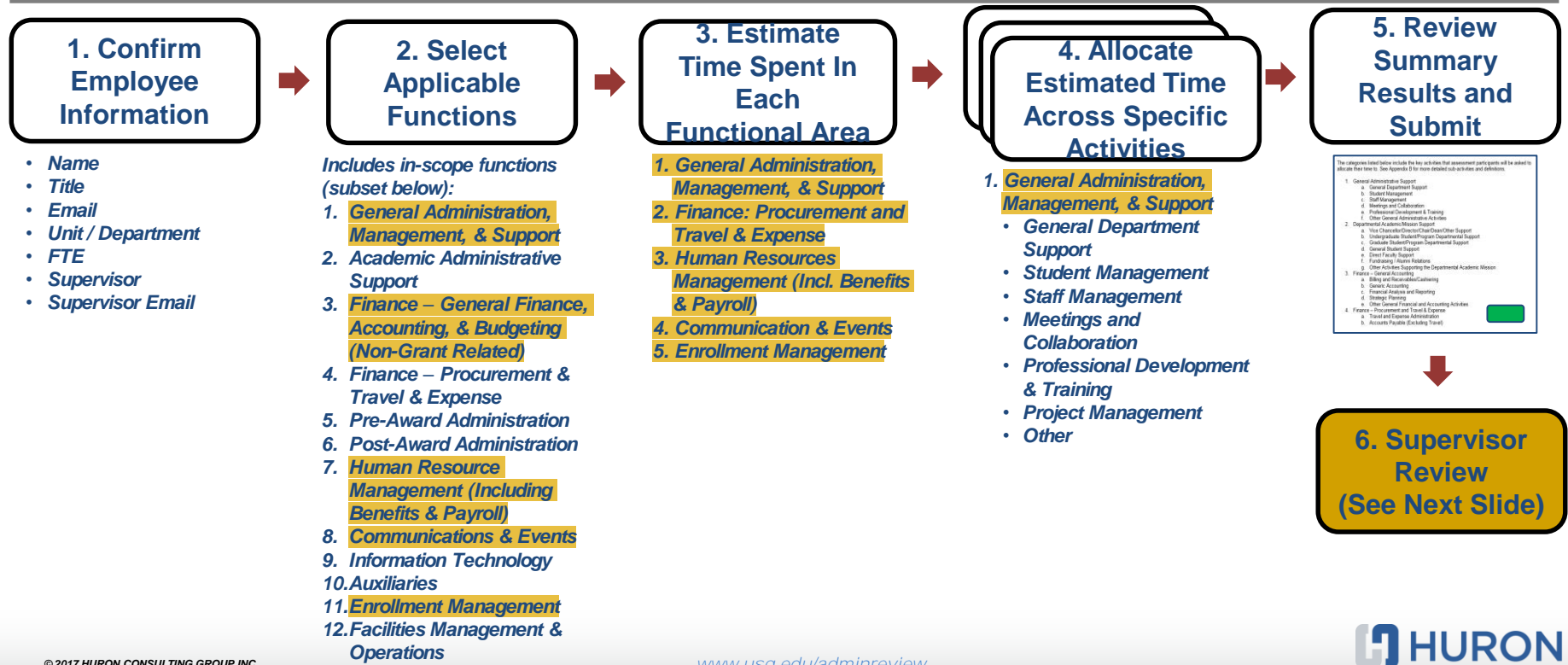
1. General Administration, Management, & Support
2. Academic and/or Clinical Administrative Support
3. Finance – General Finance, Accounting, & Budgeting (Non-Grant Related)
4. Finance – Procurement & Travel & Expense
5. Revenue Cycle (Patient Accounting)
6. Health Information Management (HIM)
7. Pre-Award Administration
8. Post-Award Administration
9. Human Resource Management (Including Benefits & Payroll)
10. Communications & Events
11. Information Technology
12. Auxiliaries
13. Compliance & Audit
14. Enrollment Management
15. Patient Access & Care Services
16. Facilities Management & Operations
17. Alumni Affairs / Development / Advancement
18. Institutional Research, Planning, & Analysis
19. Libraries
20. Academic Affairs & Professional Education
21. Student and Campus Services
22. Board Support & Engagement
23. Legal Affairs
24. Intellectual Property & Economic Development
25. External Relations
26. Other

Activity Assessment

The Activity Assessment will be administered using the Qualtrics survey tool. Time to complete the assessment will vary based on the number of functions an individual selects to allocate their time.

Staff Activity Assessment

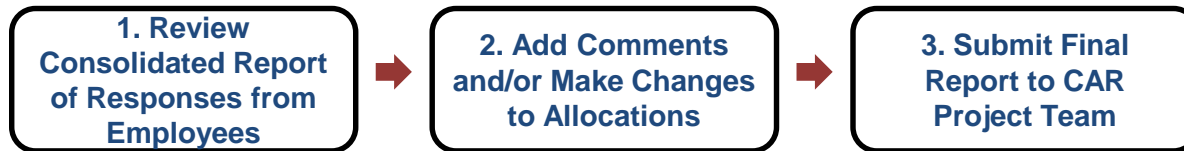
Sample Selections Illustrative



Activity Assessment Supervisor Review

During the validation period, supervisors will review and confirm their staff's responses through a separate tool and will be notified by email when their report's assessments are ready for review.

Supervisor Review



Guidelines for Supervisors:

- This is not:
 - an evaluation of performance or a classification or compensation review
 - designed to mirror your employee's job description; only to highlight administrative functions
- Before changing employee responses,
 - we expect you to communicate with your employees if you feel like the survey is not an accurate picture of what you think their daily job entails
 - Only change responses that you know to be incorrect or misinformed to improve the accuracy of the data collected

Expanded View

Name: Sample, Joe

Title: Testing

	Commitment Hours	Employee Reported (%)	Supervisor Updates, if needed (%)
+ Teaching/Research Time Total:	0.00	0.00%	0.00%
- General Administration, Management and Support	20.00	50.00%	50.00%
General Department Support	5.00	12.50%	12.50%
Student Management	0.00	0.00%	0.00%
Staff Management	0.00	0.00%	0.00%
Meetings and Collaboration	5.00	12.50%	12.50%
Professional Development and Training	0.00	0.00%	0.00%
Other General Administration, Management, and	10.00	25.00%	25.00%
+ Departmental Academic/Mission Support Total:	0.00	0.00%	0.00%
+ Finance – General Finance, Accounting and Budget	0.00	0.00%	0.00%
+ Finance – Procurement and Travel & Expense Total	0.00	0.00%	0.00%
+ Pre-Award Administration Total:	0.00	0.00%	0.00%
+ Post-Award Administration Total:	0.00	0.00%	0.00%
+ Human Resources (Including Benefits & Payroll) Total	0.00	0.00%	0.00%
+ Communications, Events, and External Relations Total	5.00	12.50%	12.50%
+ Information Technology Total:	0.00	0.00%	0.00%
+ Auxiliaries Total:	0.00	0.00%	0.00%
+ Compliance & Audit Total:	0.00	0.00%	0.00%
+ Enrollment Management Total:	0.00	0.00%	0.00%
+ Facilities Operations Total:	0.00	0.00%	0.00%
+ Alumni Affairs Total:	0.00	0.00%	0.00%
+ Institutional Research Total:	5.00	12.50%	12.50%
+ Libraries Total:	0.00	0.00%	0.00%
+ Academic Affairs Total:	0.00	0.00%	0.00%
+ Student Services Total:	0.00	0.00%	0.00%
+ Board of Regents Support and Engagement Total:	0.00	0.00%	0.00%
+ Legal & General Counsel Total:	0.00	0.00%	0.00%
+ Other L1 Total:	10.00	25.00%	25.00%
Grand Total:	40.00	100.00%	100.00%

PREPARING FOR THE ACTIVITY ASSESSMENT

How Employees Can Prepare

Use the **Activity Assessment Catalog** as a tool to:

1. Get familiar with the Functions and Activities that will be in the online tool – remember these are not formally aligned with Units / Departments
2. Document the hours or percent of time spent in each area (think of the average over a year's time)
3. Engage in dialogue with supervisor about how the assessment will be completed (in advance of completing it online)
4. Reach out with any questions or concerns to the points of contact to the AU-CAR team

On-Campus Focus Groups & Interviews



- To more thoroughly explore the results of the Activity Assessment Survey and Opportunity Identification Survey

Assessment Objective

To further evaluate and expand upon initial survey analyses, Huron will be present on campus to gain additional insight into campus operations through focus groups and individual interviews



Audience/Scope

Both the activity assessment and opportunity activity survey will inform the potential list of interviewees. In addition, Huron will interview groups that AU leadership has identified. Focus group topics and composition will vary based on survey findings and institution leadership; groups may include school/college business officers, faculty department chairs, student government, etc.



Report Development/Confirmation



- Huron will present the draft report to the AU Executive Cabinet
 - Local team will provide feedback on errors/corrections
- Huron will amend institutional report (as appropriate) and submit it officially
- AU official report response phase will begin
 - Actions will be determined by AU Leadership
 - President Keel will provide USG AU's response to Huron's institutional report

Next Steps

- Today's PowerPoint will be loaded on the AU-CAR website
 - Visit <http://augusta.edu/president/adminreview>
- Opportunity Identification Survey
 - Begins Aug 7th
 - Training Placeholder
- Activity Assessment Survey
 - Begins Aug 20th
 - Training Placeholder



FAQs and additional information can be found on the AU CAR Project Website:

www.usg.edu/adminreview/

www.augusta.edu/president/adminreview/

Contact the project team at

AU-CAR@augusta.edu



Town Hall Q & A

