

University System of Georgia Comprehensive Administrative Review



COLUMBUS STATE

UNIVERSITY

WHY COMPREHENSIVE ADMINISTRATIVE REVIEW (CAR) 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?”

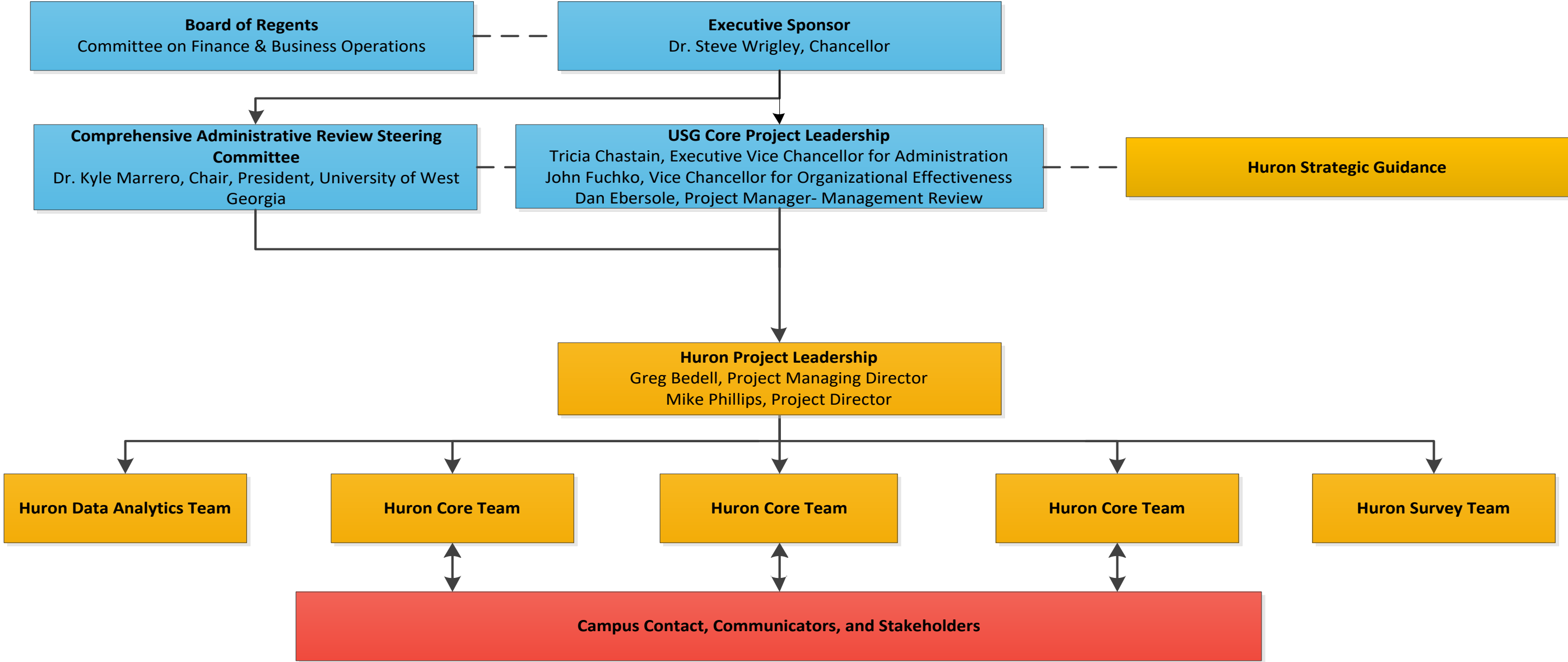
The time is right for the University System to look in the mirror. A comprehensive examination of how the System and the institutions are administered in light of the new realities in higher education will help ensure we are fulfilling our mission today and tomorrow.”

– *Chancellor Steve Wrigley*

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

PROJECT ORGANIZATIONAL STRUCTURE



COLUMBUS STATE UNIVERSITY CAR TEAM

Data Points of Contact, Campus Communications, Coordination

- Tina Butcher, Coordination (butcher_tina@columbusstate.edu)
- John Lester, CSU Communications (lester_john@columbusstate.edu)
- Frank Hardyman, Data Collection (fhardyman@columbusstate.edu)

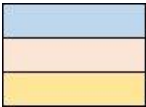
Stakeholders

- Institution Leaders - President, Vice Presidents, Deans, Department Chairs, Unit leaders faculty with administrative responsibilities, managers
- Student Leaders – Student Government Association

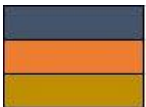
PROJECT TIMELINE – PHASE 2 INSTITUTIONS: APRIL-AUGUST

Phase II of the CAR project includes the remaining 20 USG institutions and is scheduled to concluded 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																											



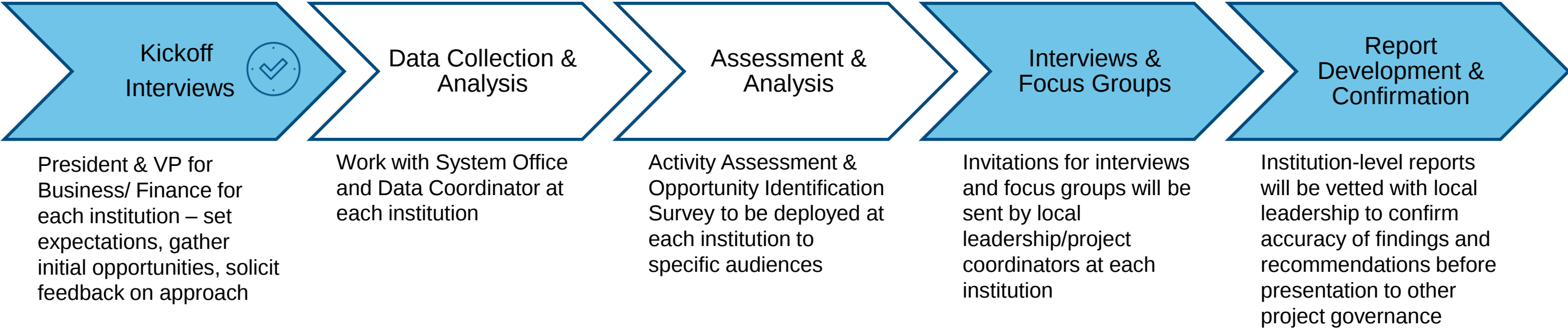
= Ramp-up, Opportunity Survey, Activity Assessment



= On-site interviews and focus-groups

PROJECT APPROACH – INSTITUTION ENGAGEMENT

INSTITUTIONAL ENGAGEMENT PROCESS



Key

-  On-Campus, In-Person
-  Primarily Off-Site

CAR DATA REQUEST

- After soliciting CAR Steering Committee input, the data request was streamlined and simplified
- Feedback was solicited from all 28 institutions on the requested items and data availability
- Initial HR and Finance files were requested and provided by USG System Office
- CSU Data Contact – Frank Hardyman
- Project team sent formal data request to Phase 2 Institutions on March 20



USG Comprehensive Administrative Review
Initial Data Request



4. In-Scope

#	Function
4.1	Admission
4.2	Admission
4.3	Auxiliary
4.4	Enrollment
4.5	Enrollment
4.6	Enrollment
4.7	Enrollment
4.8	Enrollment
4.9	Enrollment
4.10	Enrollment
4.11	Faculty
4.12	Faculty
4.13	Faculty
4.14	Faculty
4.15	HRS & HR
4.16	HRS & HR
4.17	HRS & HR
4.18	Information
4.19	Information
4.20	Information
4.21	Information
4.22	Information
4.23	Information
4.24	Information
4.25	Library
4.26	Student

USG Comprehensive Administrative Review
Initial Data Request
5/11/17

Section 2 - General Institutional Information

USG Comprehensive Administrative Review
Initial Data Request
5/11/17

Data Availability Inquiry: Please select the appropriate value in Column E based on your knowledge of what is available at your institution. Provide comments in Column H as **For Section 3, please use the second tab, "All-In-Scope Function Tracker", to provide feedback.**

Data Request Instructions:
Whenever possible, please provide documents in electronic format; for data and financial files please provide in editable format (.xlsx or .csv rather than .pdf, etc.)
Provide links to documents online if publicly available (i.e., not behind campus firewall/intranet)
If materials are unavailable, have been addressed with other data provisions, or are previously provided to USG System Office, please indicate so.
Please contact John Kaiser at kaiser@huronconsultinggroup.com with any questions

Section 1 - System-Wide Core Datasets

#	Category	Data Request	Type	Availability	Status	Notes / Info Received	Institution DPOC Comments
1.1	Finance	Annual Report and Audited Financial Statements for the most recent fiscal years (3 years if possible)	Document/Link	Available		Available via System Office for all institutions	
1.2	Finance	Detailed revenue and expense data by account category for the previous three fiscal years that reconcile to financial statements	System Extract (preferred)			Available via System Office for all institutions for FY16 & FY17 and GA/first institutions for FY15	
1.3	Finance	Transaction logs or Finance Audit Logs for each of the past 3 years, including transaction type (Budget Transfers, Campus Vouchers, Cheating/Changing Vendors, Journal Entries, Purchase Requisitions/Receipts, University Deposits, Vendor Orders, Budget Journals, AP/Billing), include system initiator and approver(s) by Employee ID # (unique identifier, if available)	System Extract (preferred)			U.S. GA Tech, GA State and Augusta will need to provide FY15	
1.4	Human Resources	All Employee HRS Extract (point in time - three years if possible) including the following: Employee ID, name, email, hire date, working title, institution, School/Division, department, FTE, annual salary, range, hourly rate, classification (Faculty, staff, etc.), reports to name, Reports to Employee ID, Reports to Email, HSA status, position funding code, research endorsement, other, DECA Classification (Exec, Admin, Staff, Faculty, etc.), primary work location	System Extract (preferred)			Available via System Office through HRDM. Institution-level follow-up may be required for search files (e.g., Reports To)	
1.5	Human Resources	HRS Transaction Data for each of the past 3 years, including transaction type (e.g., separations, pay rate change, rehire, data change, position change, transfer, promotion, etc.) with the following detail: A. Employee ID # (unique identifier) B. Home department and ID # C. Job title D. Job Code E. Position # F. Effective date G. Entry date H. Action Reason code I. Transaction entered/created by: Employee ID #, position #, job title, home department and ID#, employee ID #, position #, job title, home department and ID#	System Extract (preferred)			Available via System Office through HRDM for all institutions	
1.6	Human Resources	Vacant Position Extract - including date last filled, position owner, base salary, funding, and position attributes tracked in HRS	System Extract (preferred)				
1.7	Enrollment	Academic program enrollment and student credit hours for last 3 academic years for each school/college	System Extract (preferred)	Available		Available via System Office for all institutions	

Institution: INSERT INSTITUTION NAME

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Draft and Confidential

1 of 3

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THREE COMPONENTS:

1. OPPORTUNITY IDENTIFICATION SURVEY

2. ACTIVITY ASSESSMENT

3. HURON CAMPUS ENGAGEMENT

OPPORTUNITY IDENTIFICATION SURVEY - APRIL 9-13

OBJECTIVES, PARTICIPANTS & FUNCTIONS

Survey Objectives



- Collect information on functions and processes that work well and those that need improvement or otherwise present an opportunity for administrative efficiencies.

Survey Participants



- Equivalent of managers and above at each institution. Includes faculty with administrative responsibilities and identified student leaders.

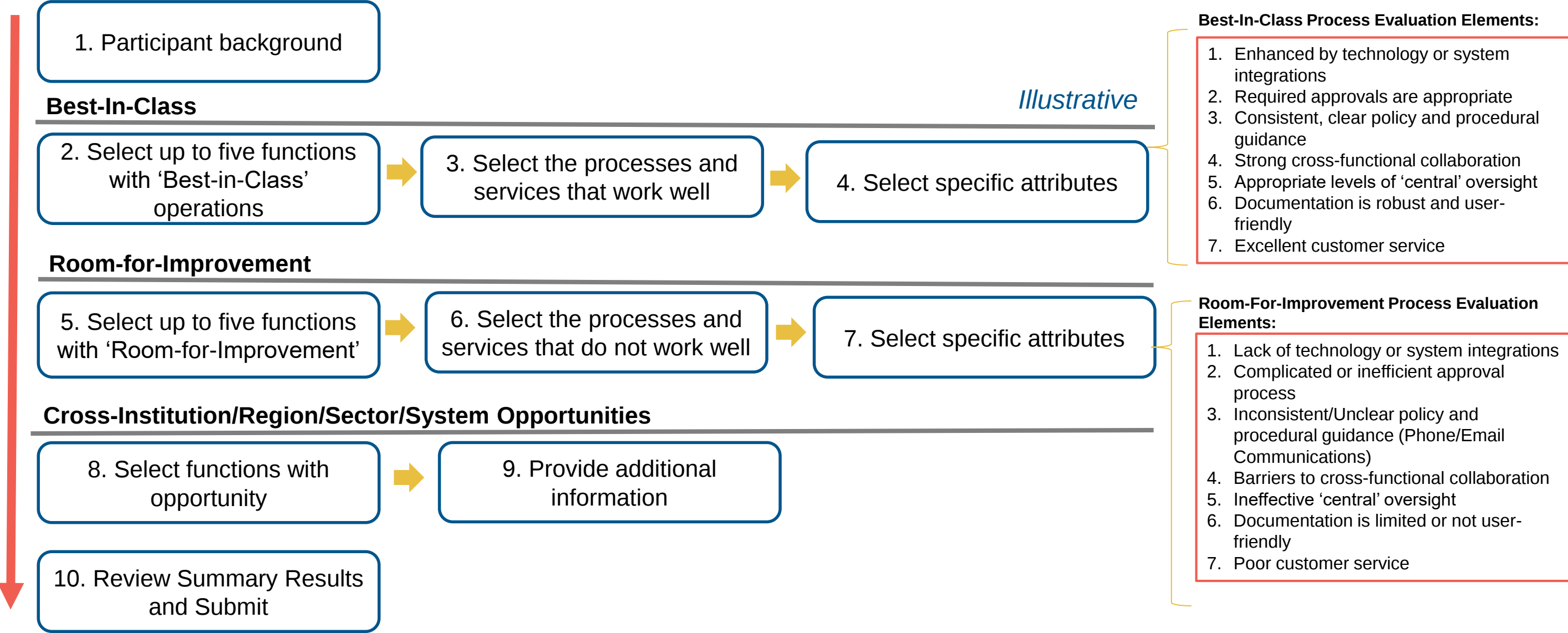
In-Scope Functions

- | | |
|--|---|
| 1. Academic/Faculty Dev. & Support | 14. Internal Audit |
| 2. Auxiliary Services | 15. Libraries |
| 3. Budget | 16. Marketing & Communications |
| 4. Enrollment Management & Financial Aid | 17. Online & Professional Education Program Development & Support |
| 5. External Relations | 18. Organizational Effectiveness/Improvement |
| 6. Facilities & Space Management | 19. Purchasing & Travel |
| 7. Fiscal/Accounting Operations | 20. Regulatory, Compliance, & Legal Services |
| 8. Fundraising, Advancement, & Development | 21. Research Administration |
| 9. Human Resources, Payroll, & Benefits | 22. Safety & Risk Management |
| 10. Information Technology | 23. Senior Administration |
| 12. Institutional Research | 24. Student Life & Services |
| 13. Intellectual Property & Economic Development | 25. Other |

OPPORTUNITY IDENTIFICATION SURVEY – APRIL 9-13

FORMAT

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



OPPORTUNITY IDENTIFICATION SURVEY – APRIL 9-13

SAMPLE SCREEN-SHOTS

Introduction



UNIVERSITY SYSTEM OF GEORGIA

As part of the Comprehensive Administrative Review project we are soliciting responses to an Opportunity Identification survey to efficiently identify existing best-in-class operations, areas that could be improved, and potential solutions to common challenges at each institution. Responses to the survey will be anonymous and only presented in summary; your candid responses are encouraged and appreciated.

Results from this survey will enable the CAR project teams to better understand opportunities across USG to design the university system for the 21st century. If you have questions or comments regarding this survey or the CAR project, please visit our project website [INSERT Link] or contact the project team at: [INSERT USG CAR Email].

To begin, we'd like to understand a little bit more about your background at USG.

At which institution within the Georgia System do you currently work?

University of West Georgia



Primary Functions

We're interested in your experiences with the units providing services in the areas listed below, whether you are a customer, colleague, or service provider.

Which of the following units/areas do you consider 'Best-in-Class' in terms of efficiency, effectiveness, and service? Please select up to five.

☐ Academic Administrative Support

☐ Administration

☐ Auxiliary Services - Dining, Housing, Print Services, and Mail Services

☐ Compliance & Audit

☐ Enrollment Management

☐ Facilities Operations

☐ Fiscal Operations

☐ Fundraising Advancement & Development

☐ Human Resources & Benefits

☐ Information Technology

☐ Institutional Research

☐ Libraries

☐ Marketing & Communications



Sub-Functions

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

ACTIVITY ASSESSMENT – APRIL 16-27

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 CSU leadership to ensure that this assessment be taken by individuals with broad administrative duties. Those positions with primarily teaching roles or with little administrative duty will be excluded from this assessment.

Activity Assessment Functions

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

ACTIVITY ASSESSMENT – APRIL 16-27

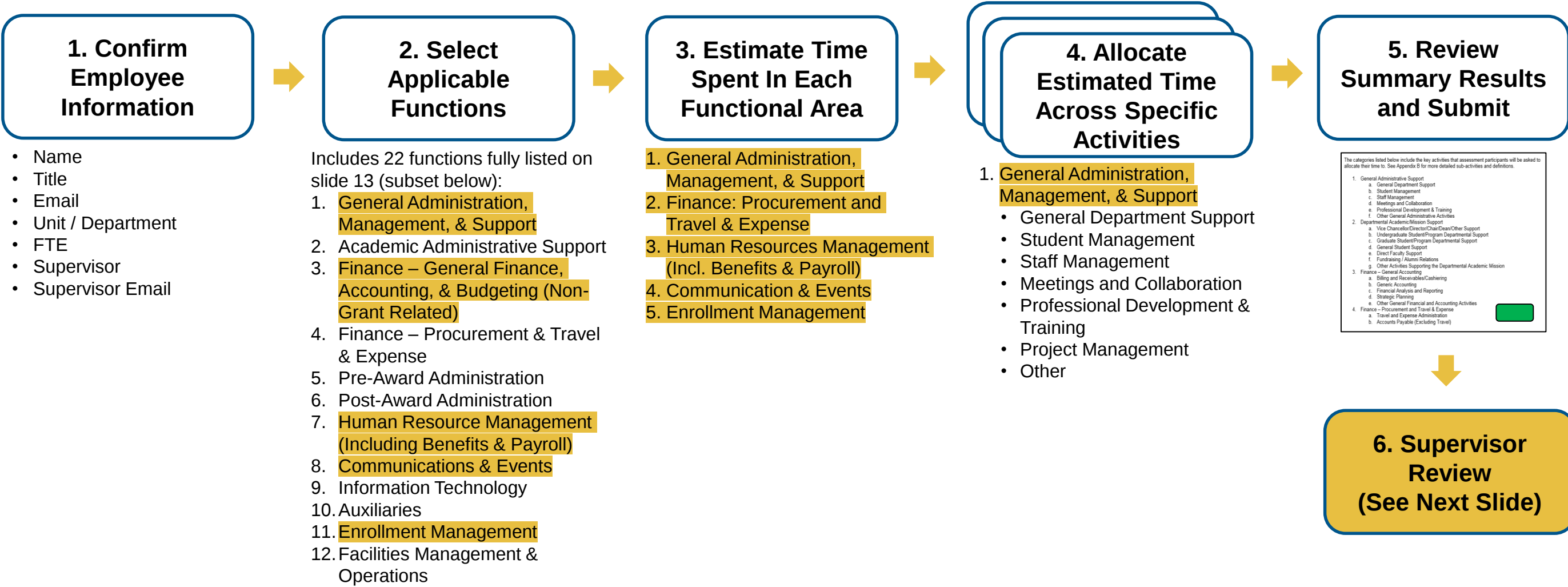
FORMAT

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 – APRIL 16-27

SAMPLE SCREEN-SHOTS

Enter/Correct Employee Information

Comprehensive Administrative Review Initiative Activity Assessment

In order to ensure appropriate allocation of effort and to facilitate supervisor review, each participant will be asked to review and update/validate the specific position information listed below.

Employee Name	
Employee Email	
Department	
Job Title	
Supervisor Name	
Supervisor Email	

ACTIVITY ASSESSMENT – APRIL 16-27

SAMPLE SCREEN-SHOTS

Distribute Academic Teaching/Research and Administrative Time

Now, please indicate the percentage of time you spend on Academic Teaching/Research and allocate the remaining percentage to Administrative/Other (Non-Teaching/Non-Research) time. Enter "0" for the category if it does not apply to you.

Please ensure that the percentages you enter sum to 100%.

Please Note: You will only need to account for and allocate time spent on Administrative/Other (Non-Teaching/Non-Research) activities as part of this assessment. Academic Teaching/Research time is not included in this review.

Academic Teaching/Research time	0
Administrative (Non-Teaching/Non-Research) time	0
Total	0

ACTIVITY ASSESSMENT – APRIL 16-27

SAMPLE SCREEN-SHOTS

Choose to Enter Time in Hours or Percent

We understand that when asked to estimate time spent on various activities, some people prefer to think in hours (based off a 40-hour work week for a full-time employee) and others like to think in terms of percentages (based off of 100%). [Click here](#) to see the example below to get a sense for which you would like to use.

Please select how you would like to enter your time throughout this assessment, in hours or percent. **Once you make this selection, you will not be able to change it without having to re-enter your estimates.**

- ☐ Hours
- ☐ Percent

ACTIVITY ASSESSMENT – APRIL 16-27

SAMPLE SCREEN-SHOTS

Select Applicable Functions

Your responses throughout the rest of the survey should reflect your Administrative (Non-Teaching/Non-Research) FTE work.

Hover over each category for more information on what is included in that section.

- ☒ General Administration, Management, & Support
- ☐ Academic Administrative Support
- ☐ Finance – General Finance, Accounting, & Budgeting (Non-Grant Related)
- ☐ Finance – Procurement and Travel & Expense
- ☐ Pre-Award Administration
- ☐ Post-Award Administration
- ☐ Human Resource Management (Including Benefits & Payroll)
- ☒ Communications & Events
- ☐ Information Technology
- ☐ Auxiliaries
- ☐ Compliance & Audit

ACTIVITY ASSESSMENT – APRIL 16-27

SAMPLE SCREEN-SHOTS

Percent

Allocate Time to Functions

Hours

Please allocate what percent of your effort is typically spent on each of the functions/areas you selected. To update your selected areas, please go back to the previous page.

Hover over each category for more information on what is included in that section.

Please Note: If you selected "Other" and entered text on the previous page, you do not need to re-key that text below.

General Administration, Management, & Support	50
Communications & Events	50
Total	100

Please allocate the number of **Administrative (Non-Teaching/Non-Research)** hours you typically spend on each of the functions/areas you selected. To update your selected areas, please go back to the previous page.

For example:

- If you are a **half-time employee** (0.5 FTE) and spend 50% of your time on administrative activities, allocate 10 hours below (out of 20).
- If you are a **full-time employee** (1.0 FTE) and spend 50% of your time on administrative activities, allocate 20 hours below (out of 40).
- If you spend 100% of your time on administrative activities, allocate all of your hours below.

Hover over each category for more information on what is included in that section.

Please Note: If you selected "Other" and entered text on the previous page, you do not need to re-key that text below.

General Administration, Management, & Support	20
Communications & Events	20
Total	40

ACTIVITY ASSESSMENT – APRIL 16-27

SAMPLE SCREEN-SHOTS

Percent

You estimated that you spend **50%** of your time performing activities in **General Administration, Management, & Support**.

Of the time you spend on **General Administration, Management, & Support**, what percent do you give to the activities listed below? Please note your allocations must sum to 100.

Hover over each category for more information on what is included in that section.

Note: If after reviewing the activities you believe you spend more or less time in this function than originally estimated, please click the back button to update your estimates.

General Department Support	25
Student Management	0
Department Operations/Management	25
Staff Management	25
Meetings and Collaboration	25
Professional Development and Training	0
Project Management	0
Organizational Effectiveness/Improvement	0
Other General Administration, Management, & Support Activities Not Listed Above	0
Total	100

Allocate Time to Activities

Hours

You estimated that you spend **20** hours performing activities in **General Administration, Management, & Support**. Please review the activities below and allocate those hours as appropriate.

Hover over each category for more information on what is included in that section.

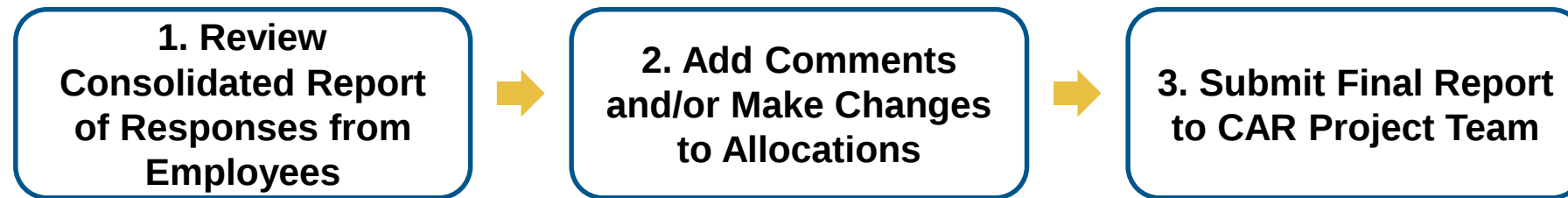
Note: If after reviewing the activities you believe you spend more or less time in this function than originally estimated, please click the back button to update your estimates.

General Department Support	5
Student Management	0
Department Operations/Management	5
Staff Management	5
Meetings and Collaboration	5
Professional Development and Training	0
Project Management	0
Organizational Effectiveness/Improvement	0
Other General Administration, Management, & Support Activities Not Listed Above	0
Total	20

ACTIVITY ASSESSMENT SUPERVISOR REVIEW – MAY 7-12

The activity assessment will provide CSU staff an opportunity to create a profile of how they currently allocate their time. We will share this information with each employee's supervisor for validation. 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



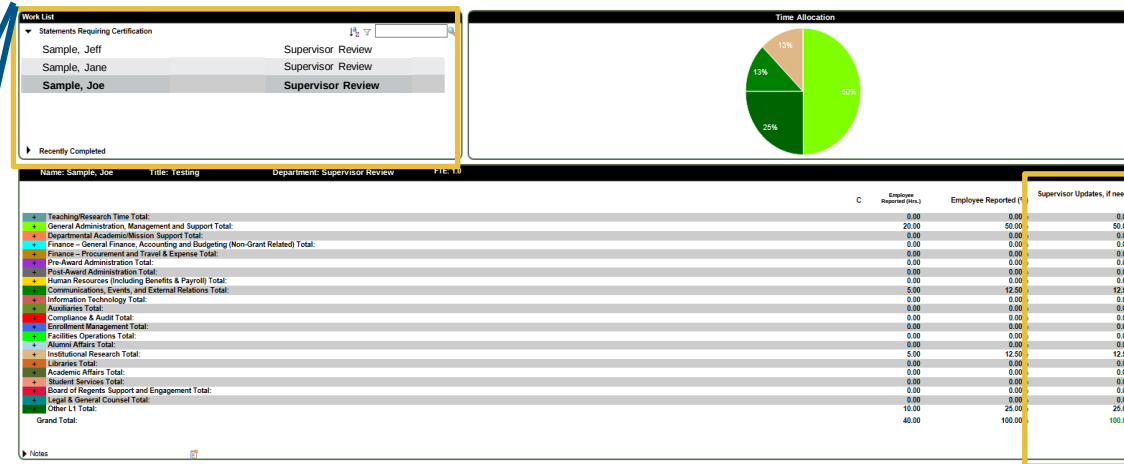
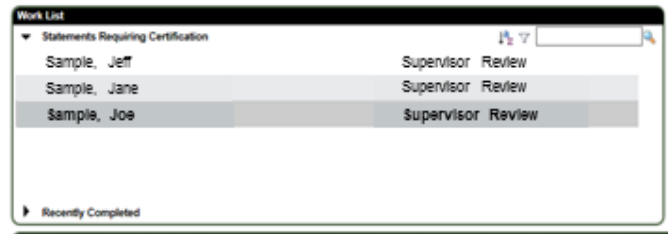
Guidelines for Supervisors:

- This is not an evaluation of an individual's performance or in any way associated with a classification or compensation review
- This assessment is not designed to mirror your employee's job description; rather, it will be used to highlight administrative functions that are a part of your employee's daily tasks
- Before changing employee responses, we encourage 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

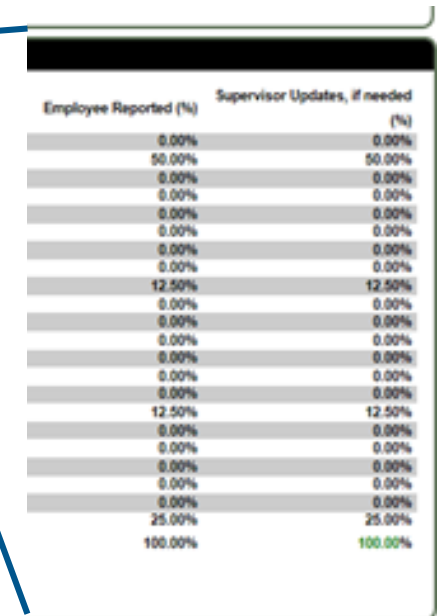
SUPERVISOR REVIEW – MAY 7-12

SAMPLE SCREEN-SHOTS

- 1 Supervisors will see a list of their employees here and select one to view an individual's report



2 Supervisors will review and make updates to time allocations



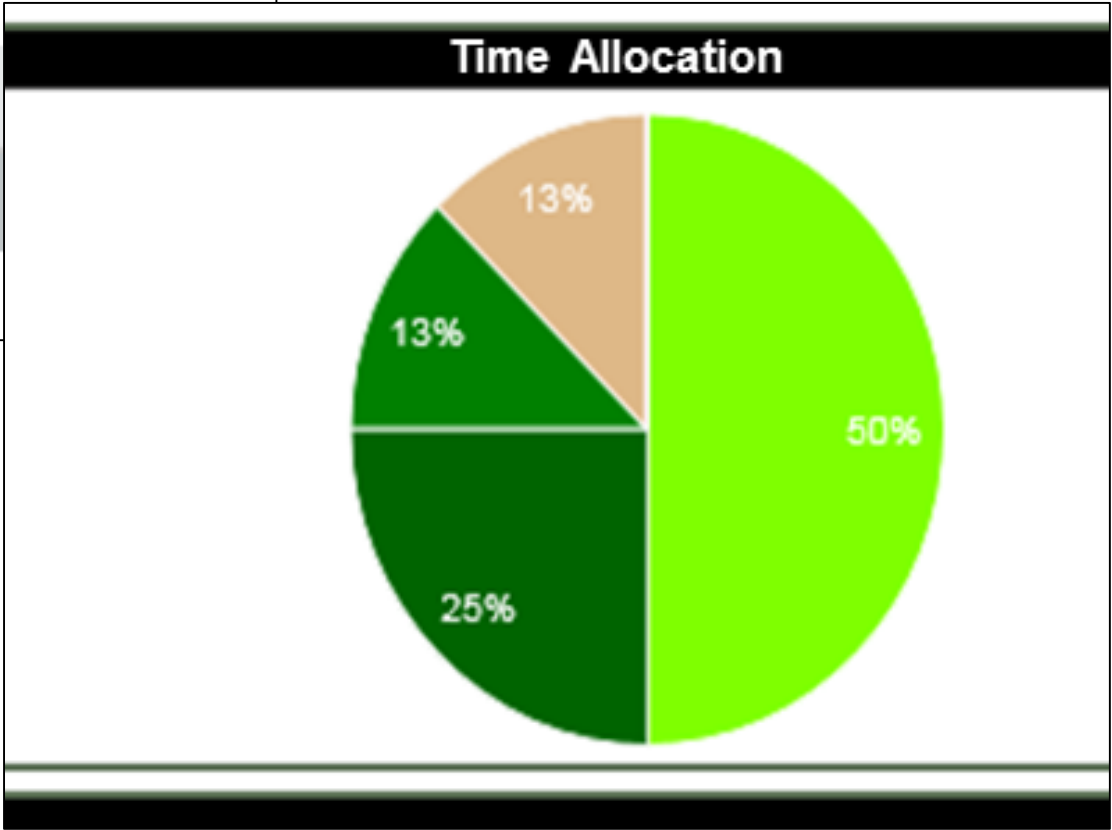
3 If changes were made, Supervisors will be required to add a note to provide justification/rationale for the adjustment before clicking “Submit.”

Supervisors will access an online application to review, update (if needed), and validate employee submitted hours. Instructions and supporting documentation will be provided to supervisors in advance of the review period.

SUPERVISOR REVIEW – MAY 7-12

SAMPLE SCREEN-SHOTS

Work List		
▼ Statements Requiring Certification		
Sample, Jeff		Supervisor Review
Sample, Jane		Supervisor Review
Sample, Joe		Supervisor Review



SUPERVISOR REVIEW – MAY 7-12

SAMPLE SCREEN-SHOTS

Consolidated View

Name: Sample, Joe Title: Testing Department: Supervisor Review FTE: 1.0			
	Employee Reported (Hrs.)	Employee Reported (%)	Supervisor Updates, if needed (%)
+ Teaching/Research Time Total:	0.00	0.00%	0.00%
+ General Administration, Management and Support Total:	20.00	50.00%	50.00%
+ Departmental Academic/Mission Support Total:	0.00	0.00%	0.00%
+ Finance – General Finance, Accounting and Budgeting (Non-Grant Related) Total:	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%

Submit

SUPERVISOR REVIEW – MAY 7-12

SAMPLE SCREEN-SHOTS

Expanded View

Name: Sample, Joe		Title: Testing	Department: Supervisor Review	FTE: 1.0
		Commitment Hours	Employee Reported (%)	Supervisor Updates, if needed (%)
+	Teaching/Research Time Total:	0.00	0.00%	0.00%
-	General Administration, Management and Support Total:	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 Support Activities - Manage special programs	10.00	25.00%	25.00%
+	Departmental Academic/Mission Support Total:	0.00	0.00%	0.00%
+	Finance – General Finance, Accounting and Budgeting (Non-Grant Related) Total:	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
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 at CSU or CAR team

HURON CAMPUS ENGAGEMENT – APRIL 30 – MAY18



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 CSU 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.

**FAQS AND ADDITIONAL INFORMATION CAN BE FOUND
ON THE CAR PROJECT WEBSITE:**

WWW.USG.EDU/ADMINREVIEW/

**QUESTIONS?
CONTACT THE PROJECT TEAM AT USG-CAR@USG.EDU**