

UWG INFORMATION SESSIONS

OCTOBER 25, 26 2017

Comprehensive Administrative Review



CAR OVERVIEW & UPDATE

- Key Objectives and Leadership Structure
- What to expect - Process, Methodology, and Proposed Timeline
- Communications – System & Campus
- Questions, Discussion, Input...Support!

WHY 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?”

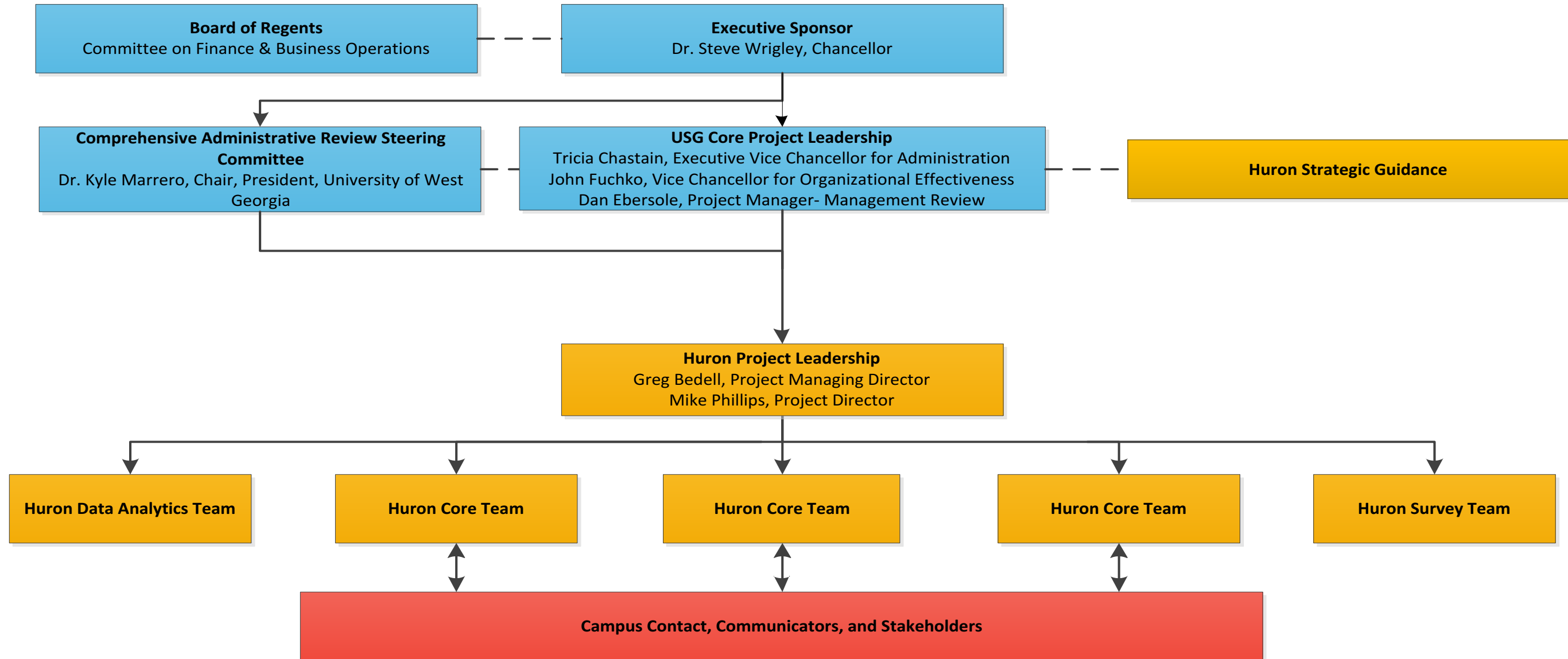
The time is right for the University System to look in the mirror. A comprehensive examination of how the System and the institutions are administered in light of the new realities in higher education will help ensure we are fulfilling our mission today and tomorrow.”

– *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



UWG CAR TEAM

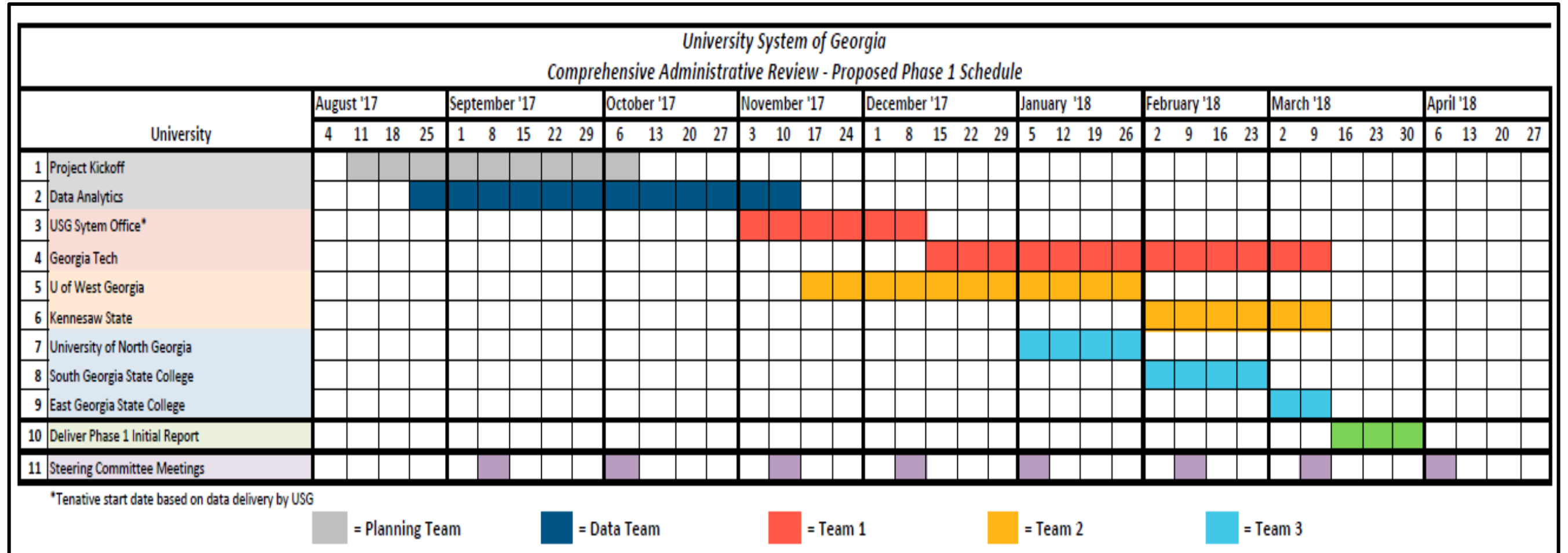
Data Points of Contact, Campus Communications, Coordination

- Juanita Hicks
- Karen Hulseley
- Paula Kepes

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 Proposed Schedule (remaining 20 institutions) will begin with the initial data request in Fall 2017. Nearing the completion of Phase I (Spring 2018) Huron will begin initial engagement of Phase 2 institutions in an order yet to be determined with a completion date of Spring 2019.



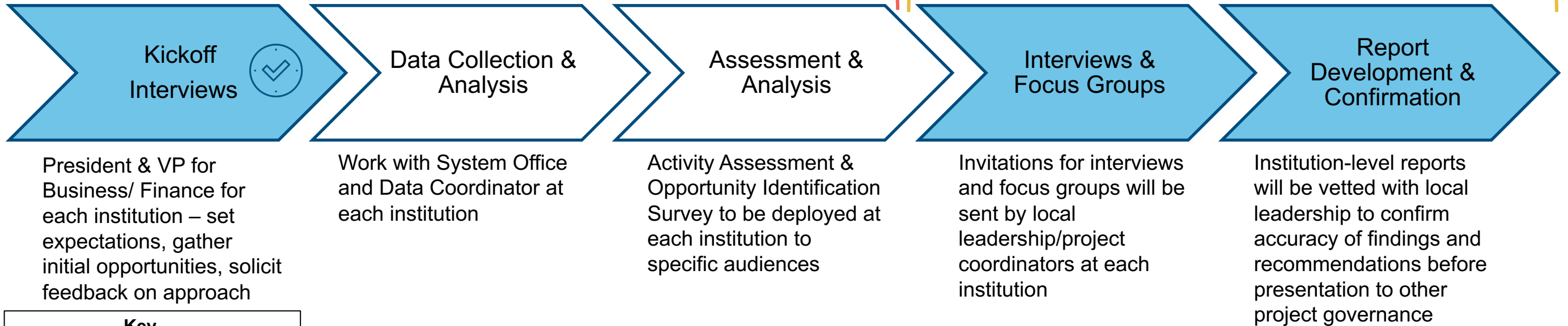
PROJECT APPROACH – INSTITUTION ENGAGEMENT

USG is composed of a diverse set of institutions with each seeking to fulfill institution specific missions. As a result, Huron is seeking feedback for the below proposed approach to system-wide stakeholder engagement.



PROPOSED INSTITUTIONAL ENGAGEMENT PROCESS

Processes will take place, more or less, simultaneously for all pilot institutions from 9/11-11/17

Processes will take place sequentially from 9/1-3/30



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
- UWG Data Contacts - Juanita Hicks, Karen Hulsey
- Project team sent formal data request to Phase 1 Institutions on September 22
- UWG data submission (pending collection of policies/processes) – October 31

USG Comprehensive Administrative Review
Initial Data Request

USG Comprehensive Administrative Review
Initial Data Request
9/11/17

USG Comprehensive Administrative Review
Initial Data Request
9/11/17

Section 2 - General Institutional Information

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 follows:
 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 were previously provided to USG System Office, please indicate so.
 Please contact John Kaiser at kaiser@huronconsultinggroup.com with any questions.

Institution: **INSERT INSTITUTION NAME**

#	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 (if available)			UGA, GA Tech, GA State and Augusta will need to provide FY15		
1.3	Finance	Transaction logs or Finance Audit Logs for each of the past 3 years, including transaction type (Budget Transfers, Campus Vouchers, Creating/Changing Vendors, Journal Entries, Purchase Requisitions/Receipts, University Deposits, Vendor Orders, Budget Journals, AR Billing); include system initiator and approver(s), by Employee ID # (unique identifier, if available)	System Extract (if available)			Available via System Office for GA/First institutions		
1.4	Human Resources	All Employee HRIS Extract (point in time - three years if possible) including the following if available: Employee ID, name, email, HR title, working title, institution, school/enrollment, department, FTE, annual salary, fringe, hourly rate, classification (faculty, staff, etc.), reports to name, Reports to Employee ID, Reports to Email, FLSA status, position funding (state, session, endowment, other), IPEDS Classification (Exec, Admin, Staff, Faculty, etc.), primary work location	System Extract (if available)			Available via System Office through HRDM; institution-level follow-up may be required for select files (e.g., Reports To)		
1.5	Human Resources	HRIS Transaction Data for each of the past 3 years, including transaction type (e.g. separations, pay rate change, retire, 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/completed by: Employee ID#, position #, job title, home department and the employee ID#, position #, job title, home department and ID#	System Extract (if available)			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 HRIS	System Extract (if available)					
1.7	Enrollment	Academic program enrollment and student credit hours for last 3 academic years for each school/college	System Extract (if available)	Available		Available via System Office for all institutions		

Draft and Confidential 1 of 3 © 2017 HURON CONSULTING GROUP INC.



ACTIVITY ASSESSMENT & OPPORTUNITY IDENTIFICATION SURVEY



ACTIVITY ASSESSMENT - OCTOBER 30 – NOVEMBER 10 FUNCTIONS, OBJECTIVES, & PARTICIPANTS

Activity Assessment Functions

1. General Administrative Support
2. Departmental Academic/Mission Support
3. Finance – General Finance, Accounting, and Budgeting (Non-Grant Related)
4. Finance – Procurement and Travel & Expense
5. Pre-Award Administration
6. Post-Award Administration
7. Human Resources (Including Benefits & Payroll)
8. Communications & Events
9. Information Technology
10. Auxiliaries
11. Compliance & Audit
12. Enrollment Management
13. Facilities Operations
14. Alumni Affairs
15. Institutional Research
16. Libraries
17. Academic Affairs
18. Student Services

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 UWG 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.



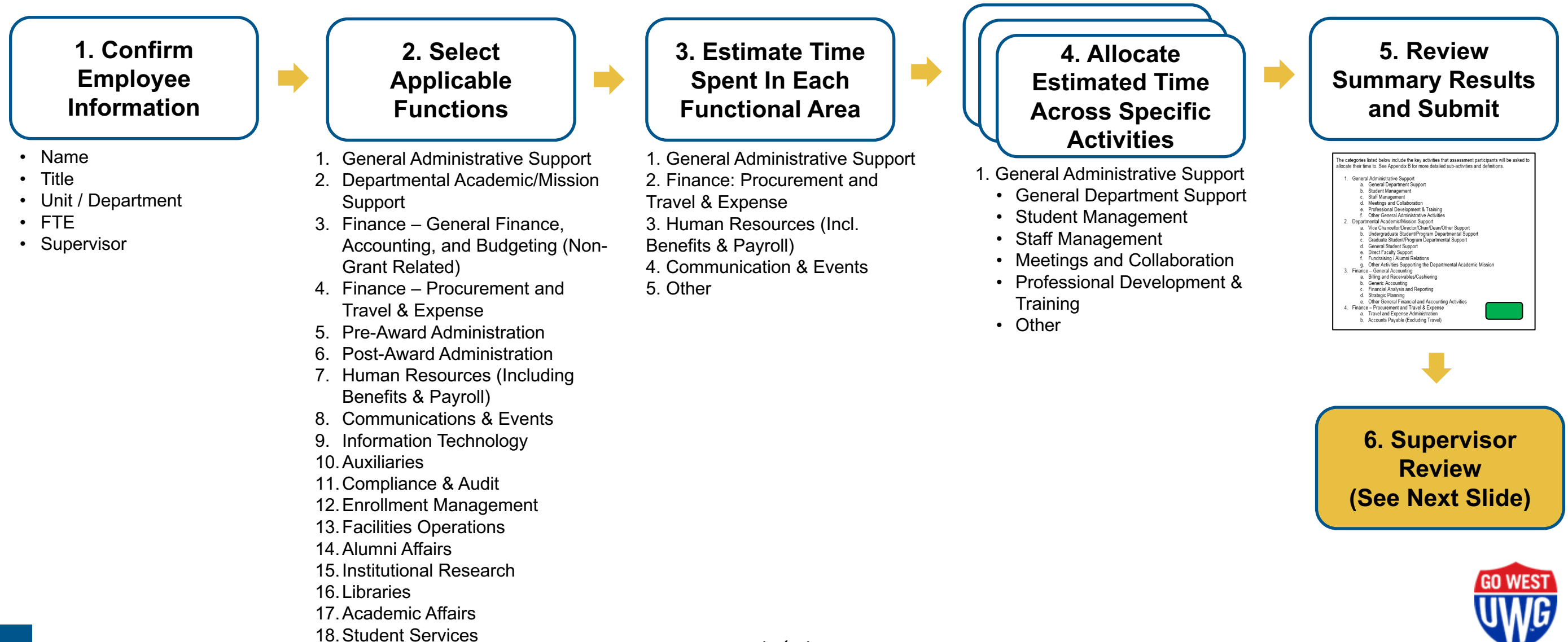
ACTIVITY ASSESSMENT – OCTOBER 30 – NOVEMBER 10

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

Illustrative

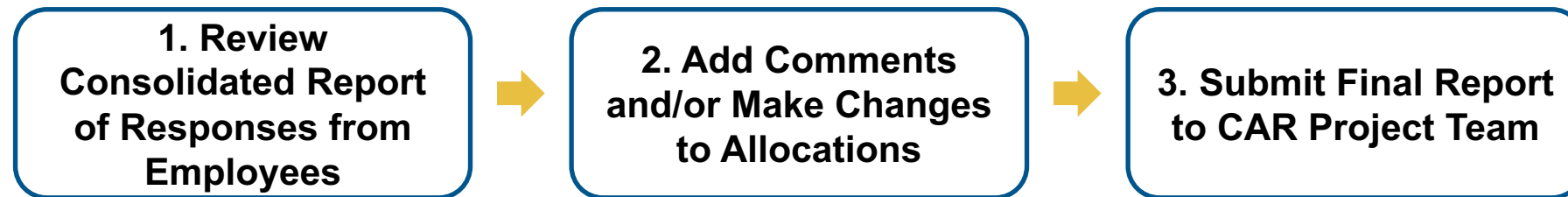


ACTIVITY ASSESSMENT – OCTOBER 30 – NOVEMBER 10

SUPERVISOR ROLE IN VALIDATION – NOV 13 - 17

The activity assessment will provide UWG staffs an opportunity to create a profile of how they currently allocate their time. We will share this information with each unit's supervisor for validation. During the validation period, supervisors will review and confirm their staff's responses.

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



ACTIVITY ASSESSMENT – OCTOBER 30 – NOVEMBER 10

SAMPLE SCREEN-SHOTS




UNIVERSITY SYSTEM OF GEORGIA

Please select the functions that align with your current job duties. Select all that apply.

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

- Human Resources (Including Benefits & Payroll)
- Finance – General Accounting
- Communications and Events
- Student Services
- Information Technology
- Auxiliaries



UNIVERSITY SYSTEM OF GEORGIA

You estimated that you spend X hours from a total of 40 performing activities in Human Resources. 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.

Time/Leave/Entry and Adjustment	0
HR Financial Administration	0
Payroll	0
Handling Student Employment Efforts	0
Recruitment and Selection	0
Classification and Compensation Support	0
New Hire Processing and Onboarding	0
Benefits and Leave	0
Talent Management	0
Academic Promotion and Tenure Process	0
Employee Relations	0



ACTIVITY ASSESSMENT DEPLOYMENT - OCTOBER 30 – NOVEMBER 10

Activity Assessment Timeline

Communication	Audience	Timing	Objective
Assessment Announcement	Participants and Supervisors	1 week prior to assessment launch (Oct 24)	Announce assessment, clarify objectives/put participants at ease, set completion expectations, identify resources and additional information
Assessment Release	Participants, cc Supervisors	Date of opening assessment (Oct 30)	Reaffirm objective, encourage participation, set completion expectations, identify resources and additional information
Supervisor Expectations	Supervisors	½ way through assessment window (Nov 3)	Confirm report to supervisors, describe supervisor validation process and expectations, identify resources and additional information
Assessment Complete	Participants, Supervisors	Assessment Close (Nov 10)	
Supervisor Validation	Supervisors	Nov 13 – Nov 17	Complete assessments from direct reports who did not participate and validate responses of completed assessments



OPPORTUNITY IDENTIFICATION SURVEY - NOVEMBER 17 - 21 FUNCTIONS, OBJECTIVES, & PARTICIPANTS

In-Scope Functions

- | | |
|--|---|
| 1. Academic Admin. Support | 12. Human Resources & Benefits |
| 2. Administration | 13. Information Technology |
| 3. Auxiliary Services - Dining | 14. Institutional Research |
| 4. Auxiliary Services - Housing | 15. Libraries |
| 5. Auxiliary Services - Print Services | 16. Marketing & Communications |
| 6. Auxiliary Services - Mail Services | 17. Purchasing & Travel |
| 7. Compliance & Audit | 18. Research Administration
(Pre/Post Award) |
| 8. Enrollment Management | 19. Safety & Risk Management |
| 9. Facilities Operations | 20. Student Life & Services |
| 10. Fiscal Operations | |
| 11. Fundraising Advancement &
Development | |

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

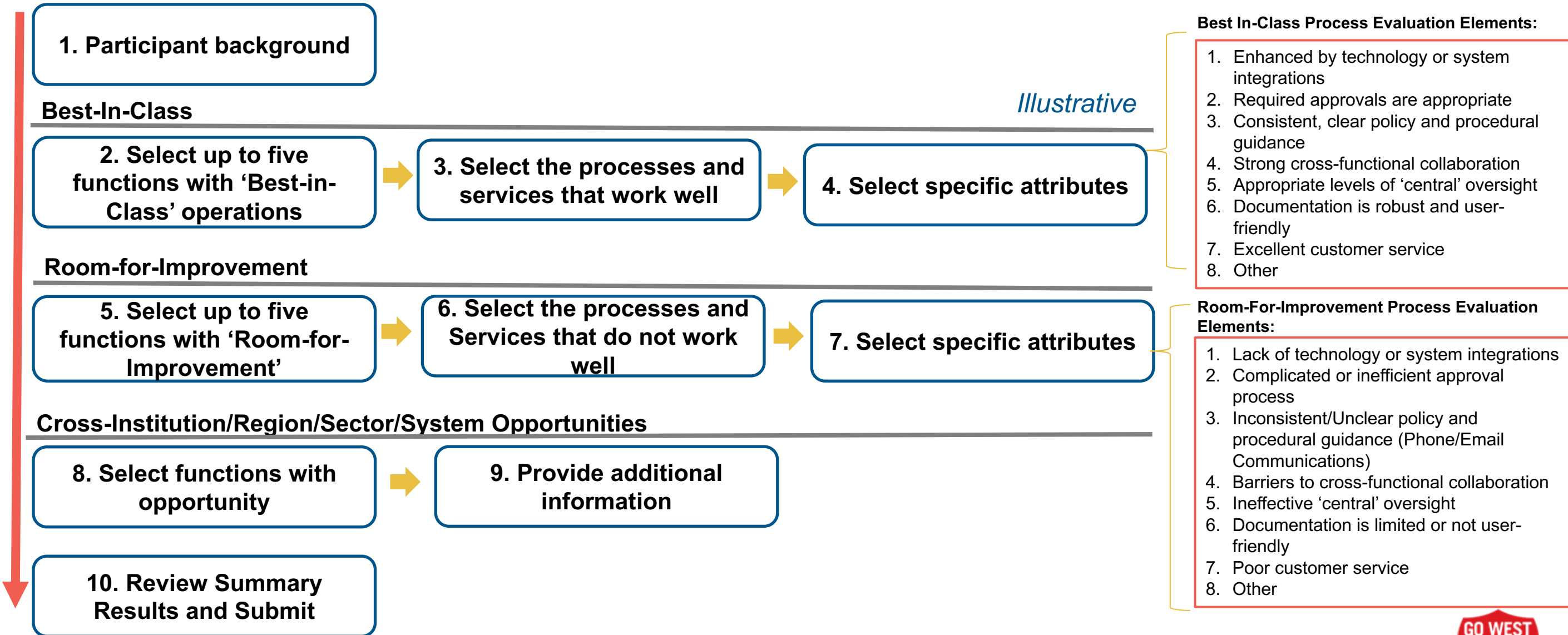


- Equivalent of managers and above at each institution. Includes faculty with administrative responsibilities and identified student leaders.



OPPORTUNITY IDENTIFICATION SURVEY – NOVEMBER 17 - 21 FORMAT

Responses to the survey will be anonymous and only presented in summary.



OPPORTUNITY IDENTIFICATION SURVEY - NOVEMBER 17 - 21 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



OPPORTUNITY IDENTIFICATION SURVEY DEPLOYMENT – NOVEMBER 17 - 21

Opportunity Identification Survey Timeline

Communication	Audience	Timing	Sender	Objective
Survey Announcement	Participants	1 week prior to assessment launch (Nov 6)	Institution Leadership, Supervisors	Announcement of survey, clarification of objectives/put participants at ease, set completion expectations, identify resources and additional information
Survey Release	Participants	Date of opening assessment (Nov 17)	Institution Leader, Supervisors	Reaffirmation of objective, encouragement of participation, set completion expectations, identify resources and additional information
Supervisor Expectations	Institution Leader	½ way through assessment window (Nov 20)	Institution Leader	Description of expectations, identification of resources and additional information
Survey Completion	Supervisors, Student Leaders	Assessment Close (Nov 21)		



HURON CAMPUS ENGAGEMENT – NOV 27 – JAN 5

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.

Validation through focus groups

- Assessment and survey responses
- Additional collection of data
- Assess need for further data collection



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 UWG leadership has identified.



Questions?
Thoughts?
Input?

Support!!!

