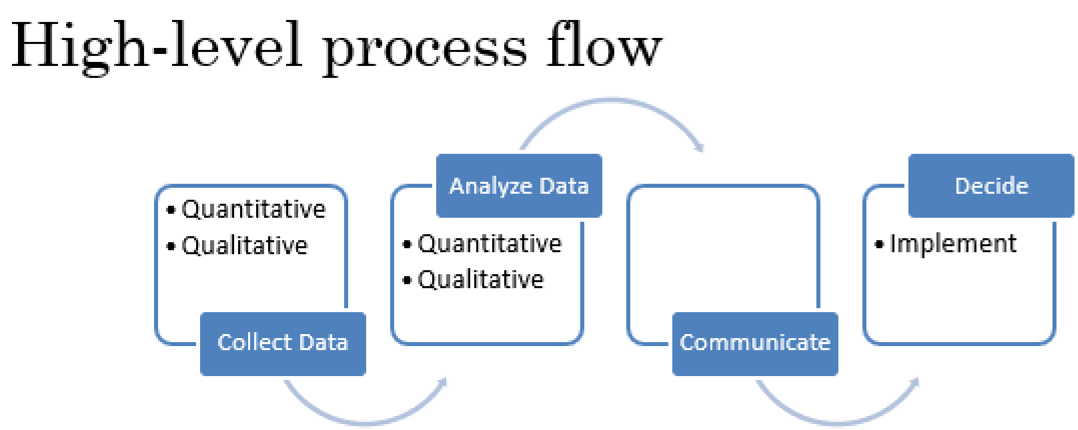
Criteria for determining cost reductions and opportunities for revenue generation in Business Affairs

The paper outlines the process and criteria for determining cost reductions and opportunities for revenue generation in Finance and Administration. Ultimately, our program analysis is about TRANSFORMING how we deliver services in Business Affairs.

The four key elements of the transformation are People, Processes, Technology and Tools. The Core Information System Replacement (CISR) will enable new technology (Workday) to enable or drive process optimization and the re-training of our people who serve the University. See Appendix One for a high-level overview of Workday launch (which summarized the process flow)

As we consider the cost management 'program analysis', it will unfold using this methodology:

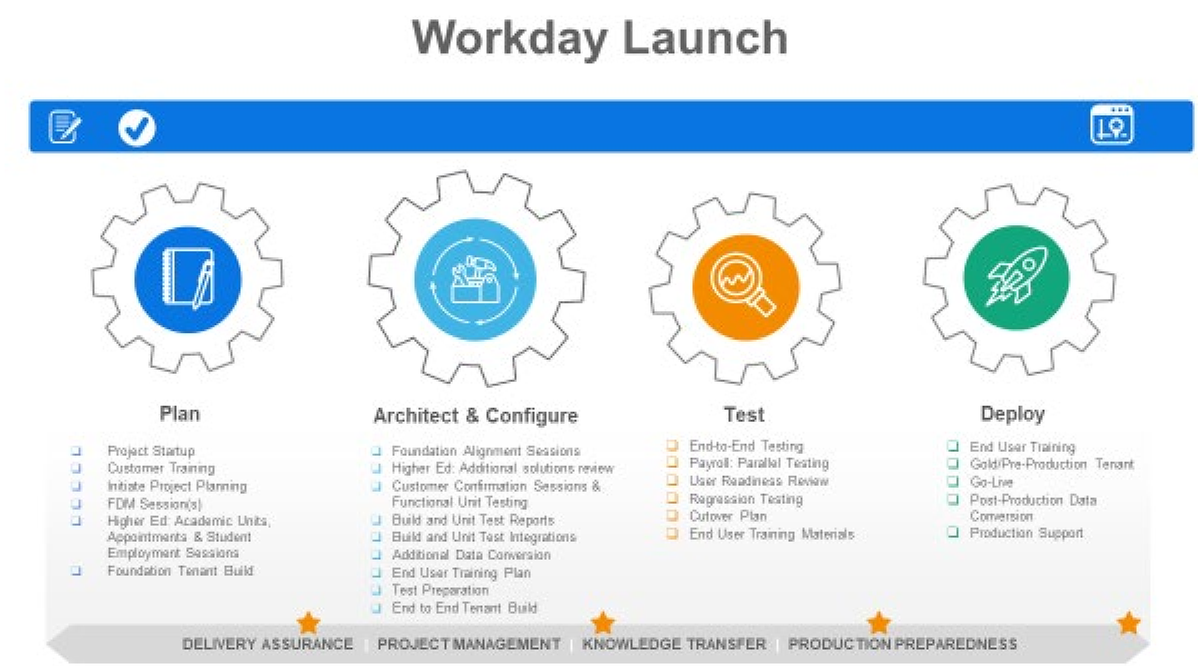


The quantitative and qualitative review has occurred in each Division within BAC (and will continue to be refined. Quantitative factors are based on funded positions and the workload factors in each functional area. The qualitative factors are shown on a master spreadsheet (which will be available on a shared BOX file when technical issues are resolved). In addition, an individual word document for each BAC Director will be available, summarizing their analysis. These 23 qualitative factors come from ***Prioritizing Academic Programs and Services*** by Dickeson, Resource C, Criteria for Measuring Administrative Programs (pp 161-163). See Appendix Two for those qualitative criteria.

In summary, analyzing the data, coupled with optimizing processes (using Workday) in Finance, HR and Payroll will create the first opportunities to identify opportunities for saving and continuous improvement.

In parallel, studying the Facilities Management and Planning and University Housing business models will identify other opportunities to reduce cost and increase revenues.

Appendix One: Workday Launch



Appendix Two: Criteria for Measuring Administrative Programs

Division Finance and Administration

Department ______________________

Employee completing form ______________________

Direction (to each BAC Director): Please work through the questions below and answer to the best of your ability – bullet points are perfect. Position/ function specific – not personnel management. The short-term purpose of this information is Cost Management.

1. What are the main objectives of your unit, and how do you measure success in achieving them?

2. What are the services that your unit provides and to which customers (students, faculty, staff, donors, others)?

3. List each position in your unit, and briefly describe the responsibilities of each. Include part-time and work-study student hours. Indicate if functionality of the position is tied to federal, state, or institutional compliance.

4. Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission?

5. How could the university help your unit do its job better?

6. In what ways does your unit relate to other units of the university, academic and non-academic? For example, what services do you provide to other units? What services do other units provide to you? On what tasks do you collaborate with other offices?

7. What skill sets and resources does you unit possess that can be shared with other units at slack times?

8. Which individuals in your unit are cross-trained and in what areas?

9. What resources do you need to improve your services to a superior level?

10. What technologies are available to you to provide your services better? What training do you need to be more effective users of the technology?

11. What one thing do you wish you could do differently to improve your effectiveness but have not had the opportunity, time, or resources to do?

12. How do you review and evaluate your department's yearly performance?

13. Explain how your unit could function with:

    a. A 10 percent reduction to staff
    b. A 20 percent reduction to staff
    c. A 30 percent reduction to staff
    d. A 10 percent reduction to non-personnel resources
    e. A 20 percent reduction to non-personnel resources
    f. A 30 percent reduction to non-personnel resource
    g. What would be the consequences or other effects on service delivery in each case?

What opportunities exist for greater collaboration and team approaches in the delivery of services?

14. How many "middle managers" do we have? Are there opportunities to reduce middle strata in the organization and expand the span of control?
15. What technological improvements could be made that would result in labor savings?
16. How can a service be more efficiently delivered?
17. What processes do we have that can be streamlined or eliminated to improve service delivery?
18. Restructuring: What efficiencies might be gained by consolidating similar entities?
19. Personnel: Have we worked around or structured around non-effective personnel and other personnel issues, and is this the time to stop indulging and start confronting the issue(s)?
20. Outsourcing: Are there other opportunities to outsource non-mission-critical services to private contractors who could do it better, faster, cheaper?
21. Customer focus: How might our services b structured or delivered to meet the needs of students, faculty, staff, donors, and others better?
22. Benchmarking: Compare your unit with similar units at other institutions or national norms.
23. What can we stop doing?