

## Business Office Consolidation for efficiency

Efficiency to me is achieving successful completion of a task from start to finish with a minimum amount of resources expended. Measures of efficiency can be dependent on the perspective from which you are viewing a task. I believe this is important because many transactions on campus are initiated by units for whom having a primary individual to assist in processing their paperwork significantly decreases the time and frustration in searching for the right person each time they need to accomplish something. It is in this area of simplifying a task from the unit's perspective where a central business office excels at increasing efficiency by providing a conduit between individual units and central or statewide offices focused on different specialties (travel office, finance, procurement, HR). The business office would also be able to assist in tasks which cross specialties (e.g., how to claim work time related to travel which is both an HR and a travel function).

I suggest that the business offices be organized under a director into teams of approximately 8 employees based on the primary function of the units served. I believe there are four main groups: instruction, research, student support & athletics, and facilities & safety. It would require additional information to which I don't have access to determine which of these groups would require additional personnel or perhaps even two or more teams within the group (likely research at least). While there would be a single director, the location of each group could be adjusted to a location preferred by the majority of the units served (e.g., locate the research team(s) on the West Ridge).

Each team would consist of one executive officer, two to three fiscal officers, one technician team leader, and four technicians. Student assistants and possibly temporary employees could supplement the regular staff, but are not reflected on the sample organizational chart.

This structure provides a number of advantages and addresses many problems which have currently been identified.

## Efficiency for the units

The technician team leader would be the primary contact for transactional requests from the units. This would simplify requests from the unit perspective because they would know who to approach. The team leader would be able to assign requests to the proper staff member in order to provide support to the units while still training and cross training team members. After assignment, the task would then be handled start to finish by the selected team member with support and/or advice from other team members as needed.

## Better training for employees and increased service to units

Single staff in a unit have difficulty receiving training because they are often filling a position after the previous staff member has already left and there is currently minimal training available from many central units. For example, although general Banner training is available, I am not aware of the Procurement office offering training for purchase order submission or receiving submission in the 6 months I have been a Fiscal Technician.

While units often would prefer to have advanced technicians, it is difficult to find qualified applicants because experience often comes with training over time which means taking from other units. By having

a technician team leader and cross-trained co-workers, the technicians on each team will have multiple avenues for training and easy access to advanced knowledge which will increase service for the units.

#### Continuous coverage for the units

When staffing at the unit level is only one person, it often leaves the unit struggling to covering duties for leave and other absences. The size of the teams allows for units to receive support in the absence (planned, unplanned, or transitional due to turnover) of any individual team member including the team leader for whom coverage would be available from one of the advanced level technicians.

#### Advancement Opportunities – staff retention

One of the complications which many units have had regarding staffing entry level positions is that often there is no room for advancement within the unit itself. After employees are with the unit 6-18 months they often accept other positions within the University. While this might be a good way to staff the more advanced positions at the University, it is difficult for the units who seem to be in a continual cycle of recruiting and training.

Each of the four technician positions would have a pre-determined and pre-approved progression by reaching targets which are tied to increases in steps and grades. Specific skills within each specialty would allow for step increases while cross training between specialties would allow for grade increases. New employees would be hired into the progression at a competitive wage based on their experience. It would allow for less experienced applicants with potential to have a way to join the University staff and receive training and support while more advanced applicants would fill a different roll and have a justification for their compensation. There would be advancement opportunities for employees which would increase retention in turn providing the University with a more stable and experienced workforce.

#### Caution

There are a few areas which will need to be carefully considered in order for the new structure to be effective. Responsibility and authority must be carefully matched. The proposed structure will not be successful if the individual positions do not have a proper correlation between the responsibility and authority of their position. For the Executive Officers, if a position is supposed to be responsible for budget adherence, then that position needs to have the associated authority to veto expenditures. For Fiscal officers, if a position is advisory in regard to budget, then the responsibility for adherence to budget limits rests with the individual who has signature authority for the expenses. For technicians, it should be clear who has which authority so that various tasks (position descriptions, job requisitions, job forms, journal vouchers, labor redistributions, requisitions, call numbers, travel authorization) are initiated only when appropriately requested and routed to the proper individuals for approval prior to final execution.

#### Addressing concerns

It is likely the expertise of the units being served will assist in optimizing the plan by listening to their feedback. It will be important to listen and address the concerns of staff during both the initial planning stage and during implementation. There will be concerns from the departments about knowing who to contact (fiscal officer for budget/planning, team manager for tasks), priority of their individual work (effective date driven, other than late submissions which will not be allowed to hinder timely requests),

availability of sufficient staff time to accomplish all the necessary task (assurance that staff estimates are realistic and will be adjusted if necessary), and loss of authority (expenditure responsibility and authority remain with the units, but the staff training and supervision will be with the business office team).

### Transition planning

This is not something which can just be implemented immediately. It will be very important to plan the transition carefully to retain as many individuals as possible during the transition such that their institutional knowledge is not lost. It will be difficult at first to provide the full documentation needed for training as well as placing employees at the proper grade and step until training resources and a full advancement schedule are developed.

Note: While the transition to the organizational structure is possible with the current systems, the maximum efficiency of this new structure will likely take 12-24 months to realize while new streamlined processes are developed. Additional efficiencies may be possible if underlying statewide processes are improved (e.g., more electronic submission methods become available for transactions or a more efficient Enterprise Management System is implemented in its entirety).

