UWG INFORMATION SESSIONS
OCTOBER 25, 26 2017

Comprehensive Administrative Review

usg.edu/adminreview
CAR OVERVIEW & UPDATE

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

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“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
UWG CAR TEAM

Data Points of Contact, Campus Communications, Coordination

- Juanita Hicks
- Karen Hulsey
- Paula Kepes

Stakeholders

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

1. **Kickoff Interviews**
   - President & VP for Business/Finance for each institution – set expectations, gather initial opportunities, solicit feedback on approach

2. **Data Collection & Analysis**
   - Work with System Office and Data Coordinator at each institution

3. **Assessment & Analysis**
   - Activity Assessment & Opportunity Identification Survey to be deployed at each institution to specific audiences

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

4. **Interviews & Focus Groups**
   - Invitations for interviews and focus groups will be sent by local leadership/project coordinators at each institution

5. **Report Development & Confirmation**
   - Institution-level reports will be vetted with local leadership to confirm accuracy of findings and recommendations before presentation to other project governance

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

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

1. Confirm Employee Information
   - Name
   - Title
   - Unit / Department
   - FTE
   - Supervisor

2. Select Applicable 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

3. Estimate Time Spent In Each Functional Area
   1. General Administrative Support
   2. Finance: Procurement and Travel & Expense
   3. Human Resources (Incl. Benefits & Payroll)
   4. Communication & Events
   5. Other

4. Allocate Estimated Time Across Specific Activities
   1. General Administrative Support
     - General Department Support
     - Student Management
     - Staff Management
     - Meetings and Collaboration
     - Professional Development & Training
     - Other

5. Review Summary Results and Submit

6. Supervisor Review (See Next Slide)
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**

1. Review Consolidated Report of Responses from Employees
2. Add Comments and/or Make Changes to Allocations
3. Submit Final Report to CAR Project Team

**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.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time/Leave/Entry and Adjustment</td>
<td>0</td>
</tr>
<tr>
<td>HR Financial Administration</td>
<td>0</td>
</tr>
<tr>
<td>Payroll</td>
<td>0</td>
</tr>
<tr>
<td>Handling Student Employment Efforts</td>
<td>0</td>
</tr>
<tr>
<td>Recruitment and Selection</td>
<td>0</td>
</tr>
<tr>
<td>Classification and Compensation Support</td>
<td>0</td>
</tr>
<tr>
<td>New Hire Processing and Onboarding</td>
<td>0</td>
</tr>
<tr>
<td>Benefits and Leave</td>
<td>0</td>
</tr>
<tr>
<td>Talent Management</td>
<td>0</td>
</tr>
<tr>
<td>Academic Promotion and Tenure Process</td>
<td>0</td>
</tr>
<tr>
<td>Employee Relations</td>
<td>0</td>
</tr>
</tbody>
</table>

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More detailed deployment plans will be developed with each pilot institution to ensure local needs are met.

**Activity Assessment Timeline**

<table>
<thead>
<tr>
<th>Communication</th>
<th>Audience</th>
<th>Timing</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Announcement</td>
<td>Participants and Supervisors</td>
<td>1 week prior to assessment launch (Oct 24)</td>
<td>Announce assessment, clarify objectives/put participants at ease, set completion expectations, identify resources and additional information</td>
</tr>
<tr>
<td>Assessment Release</td>
<td>Participants, cc Supervisors</td>
<td>Date of opening assessment (Oct 30)</td>
<td>Reaffirm objective, encourage participation, set completion expectations, identify resources and additional information</td>
</tr>
<tr>
<td>Supervisor Expectations</td>
<td>Supervisors</td>
<td>½ way through assessment window (Nov 3)</td>
<td>Confirm report to supervisors, describe supervisor validation process and expectations, identify resources and additional information</td>
</tr>
<tr>
<td>Assessment Complete</td>
<td>Participants, Supervisors</td>
<td>Assessment Close (Nov 10)</td>
<td></td>
</tr>
<tr>
<td>Supervisor Validation</td>
<td>Supervisors</td>
<td>Nov 13 – Nov 17</td>
<td>Complete assessments from direct reports who did not participate and validate responses of completed assessments</td>
</tr>
</tbody>
</table>
OPPORTUNITY IDENTIFICATION SURVEY - NOVEMBER 17 - 21
FUNCTIONS, OBJECTIVES, & PARTICIPANTS

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

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.

1. Participant background

Best-In-Class

2. Select up to five functions with ‘Best-in-Class’ operations
3. Select the processes and services that work well
4. Select specific attributes

Illustrative

Room-for-Improvement

5. Select up to five functions with ‘Room-for-Improvement’
6. Select the processes and Services that do not work well
7. Select specific attributes

Cross-Institution/Region/Sector/System Opportunities

8. Select functions with opportunity
9. Provide additional information
10. Review Summary Results and Submit

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
8. Other

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
8. Other

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OPPORTUNITY IDENTIFICATION SURVEY - NOVEMBER 17 - 21
SAMPLE SCREEN-SHOTS

Introduction

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 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 maintenance needs, costs, and projections
- Tracking usage 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 Timeline

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