University System of Georgia
Comprehensive Administrative Review
“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
UNIVERSITY OF NORTH GEORGIA CAR TEAM

Data Points of Contact, Campus Communications, Coordination

• Donna Caldwell
• Kate Maine
• Brandon Haag

Stakeholders

• Institution Leaders - President, Vice Presidents, Deans, Department Chairs, Unit leaders faculty with administrative responsibilities, managers
• Student Leaders – Student Government Association
# PROJECT TIMELINE – PHASE 1 INSTITUTIONS

## University System of Georgia

### Comprehensive Administrative Review - Phase 1 Schedule

<table>
<thead>
<tr>
<th>University</th>
<th>August '17</th>
<th>September '17</th>
<th>October '17</th>
<th>November '17</th>
<th>December '17</th>
<th>January '18</th>
<th>February '18</th>
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<td>East Georgia State College</td>
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<td>24</td>
<td>3</td>
<td>10</td>
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- [ ] = Pre-Assessment Engagement
- [ ] = On-Site Engagement

Revised 11/29/17
PROJECT APPROACH – INSTITUTION ENGAGEMENT

PROPOSED INSTITUTIONAL ENGAGEMENT PROCESS

**Processes will take place, more or less, simultaneously for all pilot institutions from 9/11-12/17**

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

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

- **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**

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

- **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.

UNG Data Contacts – Donna Caldwell, Kate Maine

Project team sent formal data request to Phase 1 Institutions on September 22.

UNG data submission (pending collection of policies/processes) – December 15.
THREE COMPONENTS:

1. OPPORTUNITY IDENTIFICATION SURVEY
2. ACTIVITY ASSESSMENT
3. HURON CAMPUS ENGAGEMENT
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
2. Auxiliary Services
3. Budget
4. Enrollment Management & Financial Aid
5. External Relations
6. Facilities & Space Management
7. Fiscal/Accounting Operations
8. Fundraising, Advancement, & Development
9. Human Resources, Payroll, & Benefits
10. Information Technology
11. Institutional Research
12. Intellectual Property & Economic Development
13. Institutional Research
14. Internal Audit
15. Libraries
16. Marketing & Communications
17. Online & Professional Education Program Development & Support
18. Organizational Effectiveness/Improvement
19. Purchasing & Travel
20. Regulatory, Compliance, & Legal Services
21. Research Administration
22. Safety & Risk Management
23. Senior Administration
24. Student Life & Services
25. Other
OPPORTUNITY IDENTIFICATION SURVEY – DECEMBER 11-19

FORMAT

Individual responses to the survey will be confidential and presented only 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

**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

**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

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Updated 1/8/18
OPPORTUNITY IDENTIFICATION SURVEY – DECEMBER 11-19
SAMPLE SCREEN-SHOTS

Introduction

UNIVERSITY SYSTEM OF GEORGIA

As part of the Comprehensive Administrative Review project, we are soliciting responses to the 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.

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 unit/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

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Updated 1/8/18
ACTIVITY ASSESSMENT – JANUARY 8-22
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 UNG 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. Departmental Academic/Research/Mission Support
3. Finance – General Finance, Accounting, & Budgeting (Non-Grant Related)
4. Finance – Procurement & Travel & Expense
5. Pre-Award Administration
6. Post-Award Administration
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 – JANUARY 8-22

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

1. Confirm Employee Information
2. Select Applicable Functions
3. Estimate Time Spent In Each Functional Area
4. Allocate Estimated Time Across Specific Activities
5. Review Summary Results and Submit
6. Supervisor Review (See Next Slide)

- Name
- Title
- Unit / Department
- FTE
- Supervisor

Includes 22 functions fully listed on slide 13 (subset below):
1. General Administration, Management, & Support
2. Departmental Academic/Research/Mission Support
3. Finance – General Finance, Accounting, & Budgeting (Non-Grant Related)
4. Finance – Procurement & Travel & Expense
5. Pre-Award Administration
6. Post-Award Administration
8. Communications & Events
9. Information Technology
10. Auxiliaries
11. Enrollment Management
12. Facilities Management & Operations

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.

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ACTIVITY ASSESSMENT – JANUARY 8-22
SAMPLE SCREEN-SHOTS

Enter Employee Information

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
Supervisor Name
Department
Job Title
## ACTIVITY ASSESSMENT – JANUARY 8-22

**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.

<table>
<thead>
<tr>
<th>Time Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Academic Teaching/Research time</td>
<td>0</td>
</tr>
<tr>
<td>Administrative (Non-Teaching/Non-Research) time</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>0</td>
</tr>
</tbody>
</table>

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ACTIVITY ASSESSMENT – JANUARY 8-22
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
Select Applicable Functions

Please select all functions that align with your current job duties. Remember that these are functions, NOT Units/Departments.

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
- Departmental Academic/Research/Mission 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
### ACTIVITY ASSESSMENT – JANUARY 8-22

**SAMPLE SCREEN-SHOTS**

#### Percent

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent</th>
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<tbody>
<tr>
<td>General Administration, Management, &amp; Support</td>
<td>50</td>
</tr>
<tr>
<td>Communications &amp; Events</td>
<td>50</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

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.

#### Allocate Time to Functions

<table>
<thead>
<tr>
<th>Category</th>
<th>Hours</th>
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<tr>
<td>General Administration, Management, &amp; Support</td>
<td>20</td>
</tr>
<tr>
<td>Communications &amp; Events</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>40</strong></td>
</tr>
</tbody>
</table>

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.
## ACTIVITY ASSESSMENT – JANUARY 8-22

### SAMPLE SCREEN-SHOTS

### Allocate Time to Activities

<table>
<thead>
<tr>
<th>Percent</th>
<th>Allocate Time to Activities</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Administration, Management, &amp; Support</td>
<td>You estimated that you spend 50% of your time performing activities in General Administration, Management, &amp; Support. Of the time you spend on General Administration, Management, &amp; 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.</td>
</tr>
<tr>
<td>General Department Support</td>
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<td>Staff Management</td>
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<td>Staff Management</td>
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<tr>
<td>Meetings and Collaboration</td>
<td>25</td>
<td>Meetings and Collaboration</td>
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<td>Professional Development and Training</td>
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<td>Professional Development and Training</td>
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<tr>
<td>Project Management</td>
<td>0</td>
<td>Project Management</td>
</tr>
<tr>
<td>Other General Administration, Management, &amp; Support Activities Not Listed Above</td>
<td>0</td>
<td>Other General Administration, Management, &amp; Support Activities Not Listed Above</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100</td>
<td><strong>Total</strong></td>
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ACTIVITY ASSESSMENT – JANUARY 8-22
SUPERVISOR ROLE IN VALIDATION – JANUARY 26 – FEBRUARY 2

The activity assessment will provide UNG staff 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

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Updated 1/8/18
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 UNG 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