

PROGRESS REPORT

Working Group Name: Centralize Financial and Business Services

Working Group #: 26

Chair: John Crawford

Date: February 25, 2022

Update on Actions Taken Since Last Report:

- This is the initial report.
- Two meetings of the working group have been held.
- Time was spent clarifying the charge and discussing what “centralization” means. There was discussion about “solid line” versus “dotted line.”
- Sub-groups have been identified and are working:
 - Arts and Sciences: ensuring alignment of finance plans with Arts and Sciences consolidation.
 - Remote campuses: discussing how these campuses fit into the centralization model.
 - Finance/HR people: working to identify staff who currently have both financial and HR functions; identifying those effort percentages; and working with HR to determine where those individuals need to be placed organizationally.
 - Budget: working with the other sub-groups to determine cost reallocations that will need to be made due to the financial centralization.
- Discussion that Academic Affairs Business Services (AABS) and Research already have centralized financial models and continuity plans in place and will be easiest units to integrate into the centralization model.
- Additional discussions about how a benefit of centralization is the sharing of best practices across campus.
- A high-level organization chart has been developed. There is recognition that it may need to be tweaked as the working group progresses.
- Much work is underway to create specific centralized college and division business group organizational charts.

Next Major Issue to be Addressed:

- Taking decentralized business functions and building centralized organizations within each unit that roll up to the college or division level.
- Finalizing decisions about the assignment of staff who currently have both financial and HR responsibilities.
- Identifying budget reallocations resulting from the centralization process.

Problems or Barriers Encountered and Solutions Identified:

- Notification to affected staff, complexity with funding of the centralized positions, and related Workday changes will require sufficient communication and HR support.

Deliverables Completed:

- The high-level organization chart has been completed.

Timeline for Completion of Remaining Deliverables:

- Identification of staff who will be part of Finance and Human Resources organizations – April 30, 2022
- Budget reallocations due to centralization – June 30, 2022
- Full implementation of the financial centralized structure – September 1, 2022