

## Organizational Excellence Leadership Council Meeting Summary - November 29, 2016

In attendance: Council: Chair: Bob Pianta. Members: Jim Matteo, Nancy Rivers, Kathy Peck, Chris Holstege, Rob Kelly, Len Schoppa, Peter Brunjes, Rob Hoover, Christina Morrell; Ex Officio: Sarah Collie; Lee Baszczewski, Mary Brackett; **Absent:** Virginia Evans, Arlene Keeling (sabbatical) Guests: Archie Holme, Phil Trella, Disha Venkatessan, Melody Bianchetto

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### **I GRADUATE ADMISSIONS ADMINISTRATIVE SERVICES**

Last spring the Council reviewed the results of a successful pilot led by ITS in FY 16 to centralize graduate admissions administrative services across three schools (A&S, Education, Engineering). Additional opportunities for coordinating administrative services for graduate students were also shared.

In response to this work, Graduate programs are moving from the VP for Research to the Provost's Office under Archie Holmes. Tight coordination between the VPR and Provost Office will continue for interdisciplinary research. Although additional opportunities for coordination have been identified (eg customer relations, marketing, and financial aid), there are no immediate plans to coordinate or consolidate these services.

### **II. EXPENSE PORTION OF TRAVEL AND EXPENSE PROJECT**

The Expense project is nearing go-live. Once fully integrated with Travel, the project will provide a seamless, electronic platform to automate workflow and reduce data entry.

The expense solution is scheduled to go live on March 20, 2017. Policy checks and approvals for exceptions are built into the system. Individual school or department policies will not be accommodated. A brief demo of the tool for the Council was provided.

The current focus is on defining process responsibilities, the support for managers to help during transition, impacts on planning and budgeting, training and communications strategies. Phase 2 will cover T&E cards and cash advances through the system.

### **III. OVERVIEW OF BUDGET TOOL PROJECT AND STATUS**

The Office of Budget & Financial Planning is leading a project to implement new technology to support budgeting and the University Financial Model. This report provided an update on the timeline, requirements, and coordination with other related work, such as the Managerial Reporting Project.

A Budget Reimaging Group worked with Huron Consulting to conduct a current state assessment and identify improvements. As a result of this work, a RFP for a new budget tool was initiated and two vendors selected as finalist. In addition, Workday's budget solution will be released next year, and the University is staying in touch with Workday on that solution. A major component of the budget system is the chart of accounts, and the University is considering how the current chart of accounts might be revised to better meet needs. The Council reiterated the importance of having the ability to incorporate actual expenses into multi-year forecasts.