University System of Georgia Comprehensive Administrative Review



WHY COMPREHENSIVE ADMINISTRATIVE REVIEW (CAR) NOW?

"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 multicampus, 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

ALBANY STATE UNIVERSITY CAR TEAM

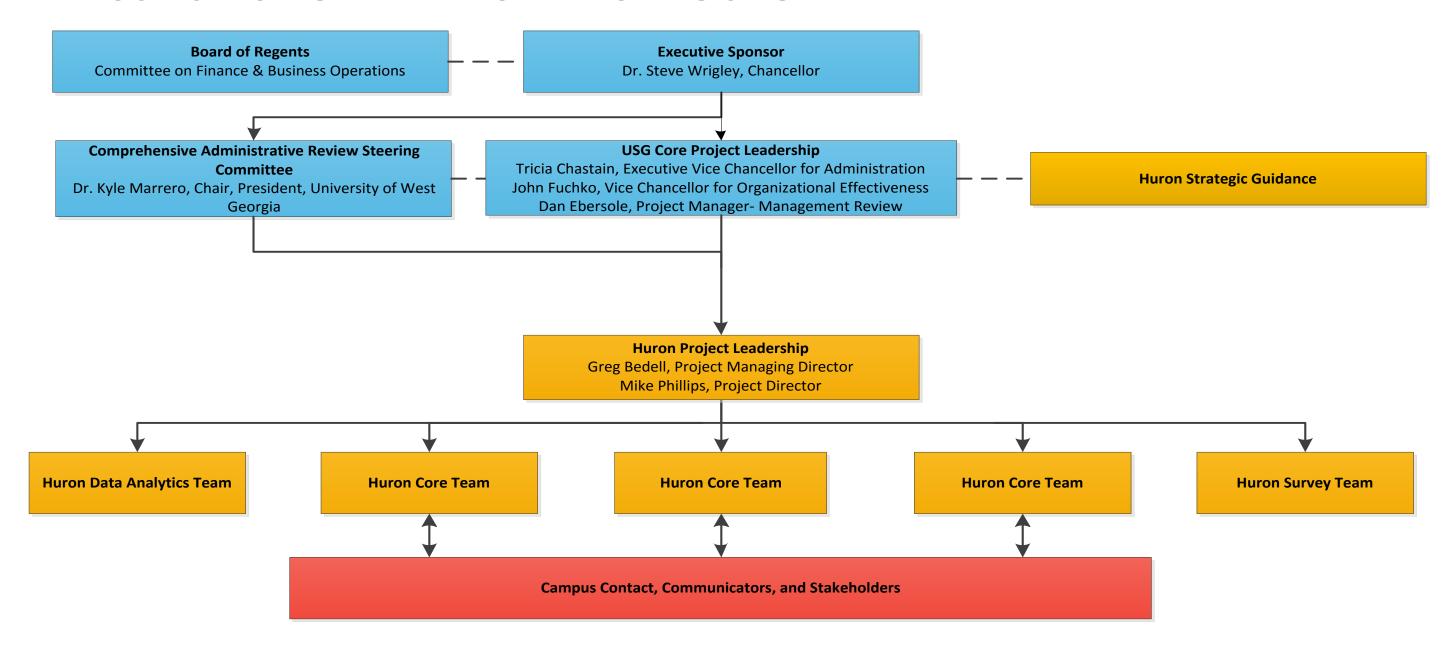
CAR Points of Contact

- CAR Lead/HR Point of Contact: Laurie Jones, Chief Human Resources Officer
- CAR Co-Lead: Tracy Williams, Director of Career Services
- Data Contacts: Office of the President, Office of Human Resources
- Communications Point of Contact: Denise Ward, Director of Marketing and Communications

Stakeholders

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

PROJECT ORGANIZATIONAL STRUCTURE

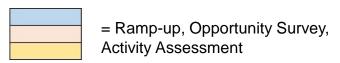


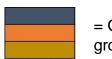


PROJECT TIMELINE – PHASE 2 INSTITUTIONS: APRIL-AUGUST

Phase II of the CAR project includes the remaining 20 USG institutions and is scheduled to conclude in early 2019. The institutions scheduled from April to August are displayed on the timeline below.

Institution		March '18			April '18			May '18			June '18				July '18			August '18									
2	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31
Valdosta State University																											
Georgia Southern University			27 3					3																39			100
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Augusta																											
University of Georgia			0.00									100 I	: 07	66 (c								20 C		0.00			
Columbus State University																											
Fort Valley State University														8k - 6		8 - 3			2 - 7			St.		3-39			
Savannah State University			10 D															8									100
Georgia College & State University																											
Georgia Southwestern State University			80 8				80 8	13											3 8				:	. 39			80
Clayton State University												5 5							3					s %			
Albany State University																											
Dalton State College																											
Gordon State College																											
College of Coastal Georgia					9			-	- 3			Ø;—€		Ø. 3		S - 35			9 9		-	P1 - F		8 8	- 31		





= On-site interviews and focusgroups



PROJECT APPROACH - INSTITUTION ENGAGEMENT

INSTITUTIONAL ENGAGEMENT PROCESS

Kickoff Assessment

Data Collection & Analysis

Assessment & Analysis

Interviews & Focus Groups

Report
Development &
Confirmation

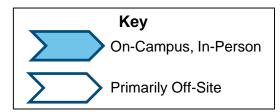
Review process, set expectations, initiate project

Work with System Office and Data Coordinator at each institution

Activity Assessment & Opportunity Identification Survey to be deployed at each institution to specific audiences

Invitations for interviews and focus groups will be sent by local leadership/project coordinators at each institution

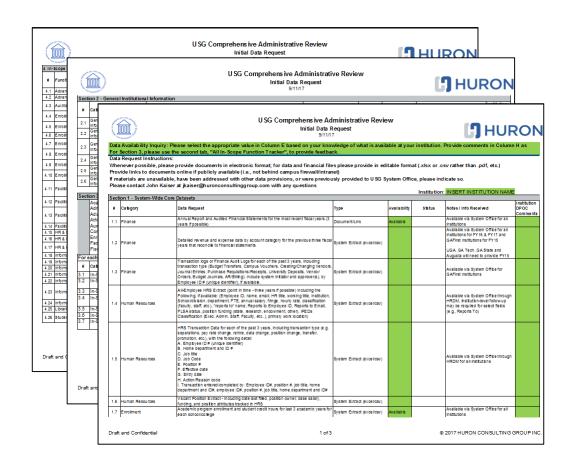
Institution-level reports
will be vetted with local
leadership to confirm
accuracy of findings and
recommendations before
presentation to other
project governance





CAR DATA REQUEST

- 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
- Albany State University Data Contacts Office of the President, Office of Human Resources
- Project team sent formal data request to Phase 2 Institutions on May 23, 2018
- Albany State University data submission (pending collection of policies/processes) – Due June 22, 2018





THREE COMPONENTS:

- 1. OPPORTUNITY IDENTIFICATION SURVEY
- 2. ACTIVITY ASSESSMENT
- 3. HURON CAMPUS ENGAGEMENT

OPPORTUNITY IDENTIFICATION SURVEY – <u>JUNE 14-22</u> OBJECTIVES, PARTICIPANTS & FUNCTIONS

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

- Academic/Faculty Dev. & Support
- **Auxiliary Services**
- Budget
- **Enrollment Management & Financial Aid**
- **External Relations**
- Facilities & Space Management
- Fiscal/Accounting Operations
- Fundraising, Advancement, & Development
- Human Resources, Payroll, & Benefits
- 10. Information Technology
- 12. Institutional Research
- 13. Intellectual Property & Economic Development

- 14. Internal Audit
- 15. Libraries
- 16. Marketing & Communications
- 17. Online & Professional Education Program **Development & Support**
- 18. Organizational Effectiveness/Improvement
- 19. Purchasing & Travel
- Regulatory, Compliance, & Legal Services
- 21. Research Administration
- 22. Safety & Risk Management
- 23. Senior Administration
- 24. Student Life & Services
- 25. Other



OPPORTUNITY IDENTIFICATION SURVEY – <u>JUNE 14-22</u>

FORMAT

Individual responses to the survey will be confidential and presented only in summary.

1. Participant background

Best-In-Class

2. Select up to three functions with 'Best-in-Class' operations



3. Select the processes and services that work well



4. Select specific attributes

Illustrative

- Enhanced by technology or system integrations
- 2. Required approvals are appropriate

Best-In-Class Process Evaluation Elements:

- 3. Consistent, clear policy and procedural guidance
- 4. Strong cross-functional collaboration
- 5. Appropriate levels of 'central' oversight
- 6. Documentation is robust and userfriendly
- 7. Excellent customer service

Room-for-Improvement

5. Select up to three 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

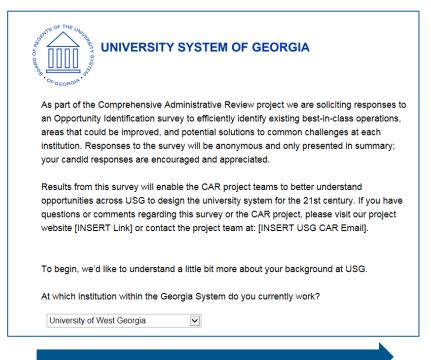
Room-For-Improvement Process Evaluation Elements:

- 1. Lack of technology or system integrations
- 2. Complicated or inefficient approval process
- 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 userfriendly
- 7. Poor customer service



OPPORTUNITY IDENTIFICATION SURVEY – <u>JUNE 14-22</u> SAMPLE SCREEN-SHOTS

Introduction



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 <u>five</u> .
☐ 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 <u>all</u> 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	



ACTIVITY ASSESSMENT – JUNE 18-29 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 Albany State University 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. Academic Administrative Support
- 3. Finance General Finance, Accounting, & Budgeting (Non-Grant Related)
- 4. Finance Procurement & Travel & Expense
- 5. Pre-Award Administration
- Post-Award Administration
- 7. Human Resource Management (Including Benefits & Payroll)
- 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 – JUNE 18-29 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**

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



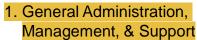
2. Select **Applicable Functions**



Includes 22 functions fully listed on slide 13 (subset below):

- 1. General Administration, Management, & Support
- 2. Academic Administrative Support
- 3. Finance General Finance. Accounting, & Budgeting (Non-**Grant Related**)
- 4. Finance Procurement & Travel & Expense
- 5. Pre-Award Administration
- 6. Post-Award Administration
- 7. Human Resource Management (Including Benefits & Payroll)
- 8. Communications & Events
- 9. Information Technology
- 10. Auxiliaries
- 11. Enrollment Management
- 12. Facilities Management & **Operations**

3. Estimate Time **Spent In Each Functional Area**



- 2. Finance: Procurement and Travel & Expense
- 3. Human Resources Management (Incl. Benefits & Payroll)
- 4. Communication & Events
- 5. Enrollment Management

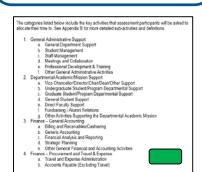
4. Allocate **Estimated Time Across Specific Activities**

- 1. General Administration. Management, & Support
 - General Department Support
 - Student Management
 - Staff Management
 - · Meetings and Collaboration
 - Professional Development & **Training**
 - Project Management
 - Other

5. Review **Summary Results** and Submit

Illustrative

Sample Selections





6. Supervisor Review (See Next Slide)



Enter/Correct Employee Information

Comprehensive Administrative Review Initiative Activity Assessment

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	
Employee Email	
Department	
Job Title	
Supervisor Name	
Supervisor Email	



Distribute Academic Teaching/Research and Administrative Time

Now, please indicate the percentage of time you spend on Academic Teaching and allocate the remaining percentage to Administrative/Other (Non-Teaching/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 or Administrative/Other (Non-Teaching/Non-Research) activities as part of tassessment. Academic Teaching/Research time is not included in this re	his
Academic Teaching/Research time	0
Administrative (Non-Teaching/Non-Research) time	0
Total	0



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.

Percent



Select Applicable Functions

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.

1	General Administration, Management, & Support
	Academic Administrative 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
	Information Technology
	Auxiliaries
	Compliance & Audit



Percent

Allocate Time to Functions

Hours

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.

General Administration, Management, & Support

50

Communications & Events

50

Total

Please allocate the number of <u>Administrative (Non-Teaching/Non-Research)</u> ho typically spend on each of the functions/areas you selected. To update your selected please go back to the previous page.	•
For example:	
 If you are a <u>half-time employee</u> (0.5 FTE) and spend 50% of your time on administrative activities, allocate 10 hours below (out of 20). If you are a <u>full-time employee</u> (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 below. 	· hours
Hover over each category for more information on what is included in that section	ı.
Please Note: If you selected "Other" and entered text on the previous page, not need to re-key that text below.	you <u>do</u>
General Administration, Management, & Support	20
Communications & Events	20
Total	40



Percent

Allocate Time to Activities

Hours

You estimated that you spend 50% of your time performing activities in Gene Administration, Management, & Support.	eral
Of the time you spend on General Administration, Management, & Suppo percent do you give to the activities listed below? Please note your allocation 100.	
Hover over each category for more information on what is included in that se	ction.
Note: If after reviewing the activities you believe you spend more or les function than originally estimated, please click the back button to upda estimates.	
General Department Support	25
Student Management	0
Department Operations/Management	25
Staff Management	25
Meetings and Collaboration	25
Professional Development and Training	0
Project Management	0
Organizational Effectiveness/Improvement	0
Other General Administration, Management, & Support Activities Not Listed Above	0
Total	100

You estimated that you spend 20 hours performing activities in General Adm Management, & Support. Please review the activities below and allocate the appropriate.	
Hover over each category for more information on what is included in that see	ction.
Note: If after reviewing the activities you believe you spend more or less function than originally estimated, please click the back button to update estimates.	
General Department Support	5
Student Management	0
Department Operations/Management	5
Staff Management	5
Meetings and Collaboration	5
Professional Development and Training	0
Project Management	0
Organizational Effectiveness/Improvement	0
Other General Administration, Management, & Support Activities Not Listed Above	0
Total	20



ACTIVITY ASSESSMENT SUPERVISOR REVIEW – JULY 9-13

The activity assessment will provide Albany State University staff an opportunity to create a profile of how they currently allocate their time. We will share this information with each employee's supervisor for validation. During the validation period, supervisors will review and confirm their staff's responses through a separate tool and will be notified by email when their report's assessments are ready for review.

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:

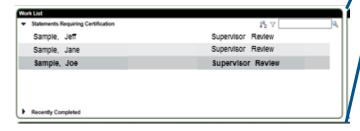
- This is not an evaluation of an individual's performance or in any way associated with a classification or compensation review
- This assessment is not designed to mirror your employee's job description; rather, it will be used to highlight administrative functions that
 are a part of your employee's 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

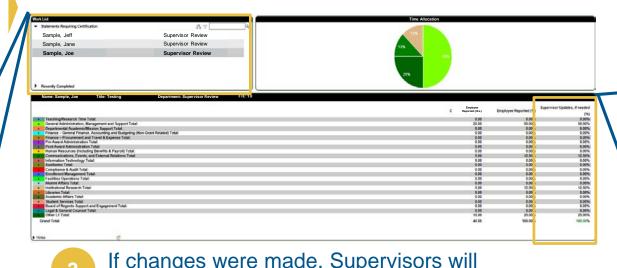


SUPERVISOR REVIEW – JULY 9-13

SAMPLE SCREEN-SHOTS

Supervisors will see a list of their employees here and select one to view an individual's report





Supervisors will review and make updates to time allocations



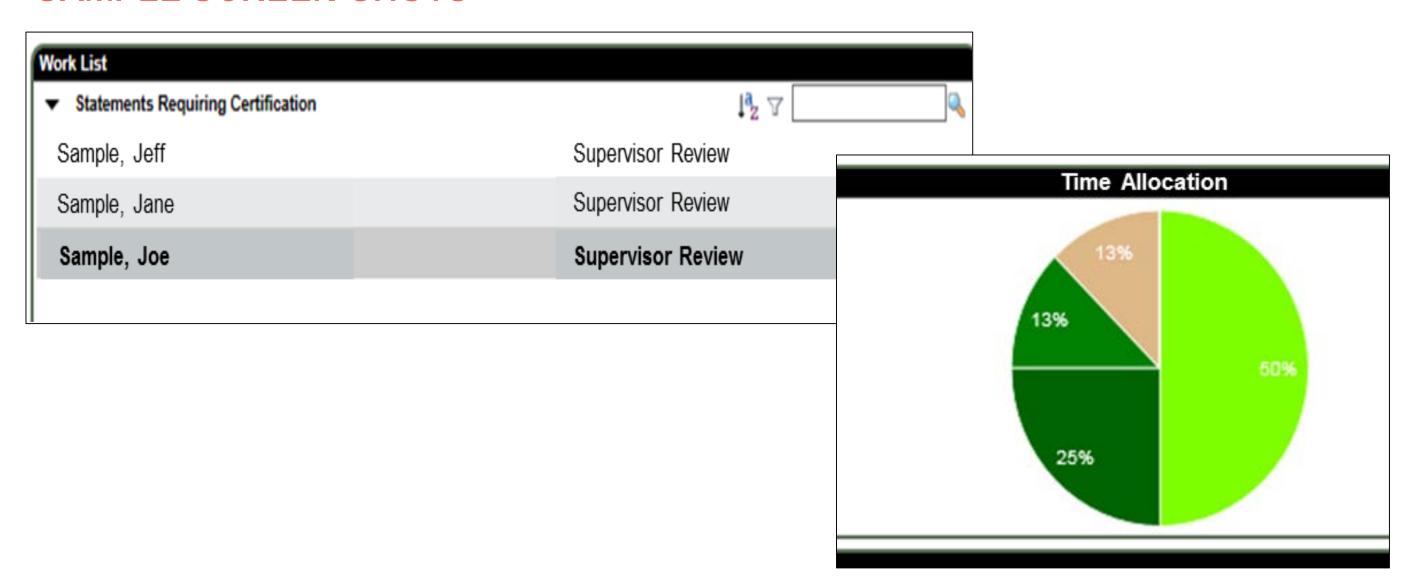
If changes were made, Supervisors will be required to add a note to provide justification/rationale for the adjustment before clicking "Submit."

Supervisors will access an online application to review, update (if needed), and validate employee submitted hours. Instructions and supporting documentation will be provided to supervisors in advance of the review period.



SUPERVISOR REVIEW – JULY 9-13

SAMPLE SCREEN-SHOTS





SUPERVISOR REVIEW – JULY 9-13

SAMPLE SCREEN-SHOTS

Consolidated View

lame: Sample, Joe	Title: Testing	Department: Supervisor Review	FTE: 1.0			
				Employee Reported (Hrs.)	Employee Reported (%)	Supervisor Updates, if neede
+ Teaching/Research Time T	otal:			0.00	0.00%	0.009
	anagement and Support Total:			20.00	50.00%	50.009
+ Departmental Academic/M			_	0.00	0.00%	0.009
	, Accounting and Budgeting (Non	-Grant Related) Total:		0.00	0.00%	0.009
+ Finance - Procurement an			-	0.00	0.00%	0.009
Pre-Award Administration				0.00	0.00%	0.009
Post-Award Administration			_	0.00	0.00%	0.00
The state of the s	ng Benefits & Payroll) Total:			0.00	0.00%	0.00
	and External Relations Total:			5.00	12.50%	12.509
Information Technology To				0.00	0.00%	0.00
+ Auxiliaries Total:	· · · · · · · · · · · · · · · · · · ·			0.00	0.00%	0.00
Compliance & Audit Total:				0.00	0.00%	0.00
Enrollment Management T			-	0.00	0.00%	0.00
Facilities Operations Total			_	0.00	0.00%	0.00
+ Alumni Affairs Total:			-	0.00	0.00%	0.009
+ Institutional Research Tota	l:			5.00	12.50%	12.50
+ Libraries Total:	**.		-	0.00	0.00%	0.00
Academic Affairs Total:				0.00	0.00%	0.00
+ Student Services Total:				0.00	0.00%	0.00
Board of Regents Support	and Engagement Total:		-	0.00	0.00%	0.00
Legal & General Counsel T				0.00	0.00%	0.009
Other L1 Total:	3.773			10.00	25.00%	25.00
Grand Total:				40.00	100.00%	100.009
						Submit

SUPERVISOR REVIEW – JULY 9-13 **SAMPLE SCREEN-SHOTS**

Expanded View

ne: Sample, Joe Title: Testing Departmen	nt: Supervisor Review	FTE: 1.0		
		Commitment Hours	Employee Reported (%)	Supervisor Updates, if need
Teaching/Research Time Total:		0.00	0.00%	0.0
- General Administration, Management and Support Total:		20.00	50.00%	50.0
General Department Support		5.00	12.50%	12.50
Student Management		0.00	0.00%	0.0
Staff Management		0.00	0.00%	0.0
Meetings and Collaboration		5.00	12.50%	12.5
Professional Development and Training		0.00	0.00%	0.0
Other General Administration, Management, and Support Activities -	Manage special programs	10.00	25.00%	25.0
Departmental Academic/Mission Support Total:		0.00	0.00%	0.0
Finance – General Finance, Accounting and Budgeting (Non-Grant Re	lated) Total:	0.00	0.00%	0.0
Finance – Procurement and Travel & Expense Total:		0.00	0.00%	0.
Pre-Award Administration Total:		0.00	0.00%	0.1
Post-Award Administration Total:		0.00	0.00%	0.
Human Resources (Including Benefits & Payroll) Total:		0.00	0.00%	0.
Communications, Events, and External Relations Total:		5,00	12.50%	12.
Information Technology Total:		0.00	0.00%	0.
Auxiliaries Total:		0.00	0.00%	0.
Compliance & Audit Total:		0.00	0.00%	0.
Enrollment Management Total:		0.00	0.00%	0.
Facilities Operations Total:		0.00	0.00%	0.
Alumni Affairs Total:		0.00	0.00%	0.
Institutional Research Total:		5.00	12.50%	12.
Libraries Total:		0.00	0.00%	0.
Academic Affairs Total:		0.00	0.00%	0.
Student Services Total:		0.00	0.00%	0.
Board of Regents Support and Engagement Total:		0.00	0.00%	0.
Legal & General Counsel Total:		0.00	0.00%	0.
Other L1 Total:		10.00	25.00%	25.0
Grand Total:		40.00	100.00%	100.0



PREPARING FOR THE ACTIVITY ASSESSMENT



HOW EMPLOYEES CAN PREPARE

Use the **Activity Assessment Catalog** as a tool to:

- Get familiar with the Functions and Activities that will be in the online tool remember these are not formally aligned with Units / Departments
- Document the hours or percent of time spent in each area (think of the average over a year's time)
- 3. Engage in dialogue with supervisor about how the assessment will be completed (in advance of completing it online)
- 4. Reach out with any questions or concerns to the points of contact at ASU or CAR team

Supporting Materials (Links):

- Activity Assessment Catalog
- Activity Assessment Worksheet



HURON CAMPUS ENGAGEMENT – JULY 9 - 20

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 Albany State University 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

