June 12, 2018

University System of Georgia Comprehensive Administrative Review



www.usg.edu/adminreview

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	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								l (
Georgia State												3										1					
Augusta																											
University of Georgia										_		10															
Columbus State University																											
Fort Valley State University														92 - S					3 - 3					8 S 			
Savannah State University																											
Georgia College & State University																											
Georgia Southwestern State University							1				-																
Clayton State University		_																				8					
Albany State University																											
Dalton State College			11				i i		:)													1					í.
Gordon State College																											
College of Coastal Georgia											S	9.—		2		0 - S			8 9					S - 5			

Activity Assessment



= On-site interviews and focus-

groups



PROJECT APPROACH – INSTITUTION ENGAGEMENT







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 – JUNE 14-22 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

- 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
- 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
- 20. Regulatory, Compliance, & Legal Services
- 21. Research Administration
- 22. Safety & Risk Management
- 23. Senior Administration
- 24. Student Life & Services
- 25. Other



OPPORTUNITY IDENTIFICATION SURVEY – JUNE 14-22 FORMAT

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



OPPORTUNITY IDENTIFICATION SURVEY – JUNE 14-22 SAMPLE SCREEN-SHOTS

Introduction

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	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.	
s part of the Comprehensive Administrative Review project we are soliciting responses to Opportunity Identification survey to efficiently identify existing best-in-class operations, eas that could be improved, and potential solutions to common challenges at each	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> .	
stitution. Responses to the survey will be anonymous and only presented in summary; our candid responses are encouraged and appreciated.	Academic Administrative Support	
esults from this survey will enable the CAR project teams to better understand	Administration	Sub-Functions
portunities across USG to design the university system for the 21st century. If you have lestions or comments regarding this survey or the CAR project, please visit our project	Auxiliary Services - Dining, Housing, Print Services, and Mail Services	Sub-Functions
ebsite [INSERT Link] or contact the project team at: [INSERT USG CAR Email].	Compliance & Audit	Which of the following processes/services listed below align with your 'Best-in-Class'
	Enrollment Management	designation? Please select <u>all</u> that apply.
begin, we'd like to understand a little bit more about your background at USG.	Facilities Operations	Evaluate capital plan (construction, deferred maintained, etc.)
which institution within the Georgia System do you currently work?	Fiscal Operations	Determine if the APPA level of building service is sufficient
University of West Georgia	Fundraising Advancement & Development	Tracking deferred maintained needs, costs, and projections
	Human Resources & Benefits	Tracking use and cost of space
	Information Technology	Requesting services
	Institutional Research	Monitoring progress and completion of service requests
	Libraries	Timely, clear, billing for services provided
	Marketing & Communications	Timely follow-up and resolution for requesting services
		Developing comprehensive plan for capital projects
	,	Requesting design services

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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
- 6. 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.

Sample Selections

Illustrative

Staff Activity Assessment



ACTIVITY ASSESSMENT – <u>JUNE 18-29</u> SAMPLE SCREEN-SHOTS

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.

	1057	
Employee Name		
Employee Email		
Department		
Job Title		
Supervisor Name		
Supervisor Email		



ACTIVITY ASSESSMENT – <u>JUNE 18-29</u> 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.

Academic Teaching/Research time	0	J
Administrative (Non-Teaching/Non-Research) time	0	
Total	0	



ACTIVITY ASSESSMENT – <u>JUNE 18-29</u> 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%). <u>Click here</u> 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.

O Hours

O Percent



ACTIVITY ASSESSMENT – JUNE 18-29 SAMPLE SCREEN-SHOTS

Select Applicable Functions

Your responses throughout the rest of the survey should reflect your <u>Administrative</u> (Non-Teaching/Non-Research) FTE work.

Hover over each category for more information on what is included in that section.

- 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



ACTIVITY ASSESSMENT – JUNE 18-29 SAMPLE SCREEN-SHOTS

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 <u>do</u> <u>not</u> need to re-key that text below.

Communications & Events 50	
Total 100	

Please allocate the number of <u>Administrative (Non-Teaching/Non-Research)</u> 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 <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 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 <u>do</u> <u>not</u> need to re-key that text below.

General Administration, Management, & Support	20
Communications & Events	20
Total	40



ACTIVITY ASSESSMENT – JUNE 18-29 **SAMPLE SCREEN-SHOTS**

Percent

You estimated that you spend 50% of your time performing activities in General Administration, Management, & Support.

Of the time you spend on General Administration, Management, & 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.

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

Allocate Time to Activities

Hours

You estimated that you spend 20 hours performing activities in General Administration, Management, & Support. 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.

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.

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



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





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.







Consolidated View

			Employee Reported (Hrs.)	Employee Reported (%)	Supervisor Updates, if needed
+ Teaching/Research Time Total			0.00	0.00%	0.00%
+ General Administration, Manag	ement and Support Total:		20.00	50.00%	50.00%
+ Departmental Academic/Missio			0.00	0.00%	0.009
	counting and Budgeting (Non-Gra	nt Related) Total:	0.00	0.00%	0.009
Finance - Procurement and Tr	avel & Expense Total:		0.00	0.00%	0.009
 Pre-Award Administration Tota 	ıl:		0.00	0.00%	0.009
+ Post-Award Administration To	tal:		0.00	0.00%	0.009
Human Resources (Including E	Benefits & Payroll) Total:		0.00	0.00%	0.009
Communications, Events, and	External Relations Total:		5.00	12.50%	12.509
 Information Technology Total: 			0.00	0.00%	0.009
Auxiliaries Total:			0.00	0.00%	0.009
Compliance & Audit Total:			0.00	0.00%	0.009
Enrollment Management Total:			0.00	0.00%	0.009
Facilities Operations Total:			 0.00	0.00%	0.009
Alumni Affairs Total:			0.00	0.00%	0.00
 Institutional Research Total: 			5.00	12.50%	12.50
 Libraries Total: 			0.00	0.00%	0.009
 Academic Affairs Total: 			 0.00	0.00%	0.009
Student Services Total:			0.00	0.00%	0.00
Board of Regents Support and			 0.00	0.00%	0.00
Legal & General Counsel Total	:		0.00	0.00%	0.00
Other L1 Total:			10.00	25.00%	25.009
Grand Total:			40.00	100.00%	100.009

Submit



Expanded View

me: Sample, Joe	Title: Testing	Department: Supervisor Review	FTE: 1.0		
			Commitment Hours	Employee Reported (%)	Supervisor Updates, if need
+ Teaching/Research T	me Total:		0.00	0.00%	0.0
 General Administration 	on, Management and Support	Total:	20.00	50.00%	50.0
General Departm	ent Support		5.00	12.50%	12.50
Student Manager	nent		0.00	0.00%	0.00
Staff Managemer	t		0.00	0.00%	0.0
Meetings and Co	laboration		5.00	12.50%	12.50
Professional Dev	elopment and Training		0.00	0.00%	0.0
Other General Ac	iministration, Management, and	Support Activities - Manage special programs	10.00	25.00%	25.0
Departmental Academ	nic/Mission Support Total:		0.00	0.00%	0.0
		ting (Non-Grant Related) Total:	0.00	0.00%	0.0
	nt and Travel & Expense Tota	E Contraction of the second	0.00	0.00%	0.0
Pre-Award Administra			0.00	0.00%	0.0
Post-Award Administ			0.00	0.00%	0.0
	cluding Benefits & Payroll) T		0.00	0.00%	0.0
Communications, Eve	ents, and External Relations T	otal:	5.00	12.50%	12.
Information Technolo	gy Total:		0.00	0.00%	0.0
Auxiliaries Total:			0.00	0.00%	0.0
Compliance & Audit 1			0.00	0.00%	0.0
Enrollment Managem			0.00	0.00%	0.0
Facilities Operations	Total:		0.00	0.00%	0.0
Alumni Affairs Total:			0.00	0.00%	0.0
Institutional Research	l otal:		5.00	12.50%	12.5
Libraries Total:			0.00	0.00%	0.0
Academic Affairs Tot			0.00	0.00%	0.0
Student Services Tot			0.00	0.00%	0.0
	port and Engagement Total:		0.00	0.00%	0.0
Legal & General Cour	isel Total:		0.00	0.00%	0.0
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:

- 1. Get familiar with the Functions and Activities that will be in the online tool remember these are not formally aligned with Units / Departments
- 2. 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):

- <u>Activity Assessment Catalog</u>
- <u>Activity Assessment Worksheet</u>



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: <u>WWW.USG.EDU/ADMINREVIEW/</u>

QUESTIONS? CONTACT THE PROJECT TEAM AT USG-CAR@USG.EDU



www.usg.edu/adminreview