

PROGRESS REPORT

Working Group Name: Centralize Financial and Business Services

Working Group #: 26

Chair: John Crawford

Date: March 28, 2022

Update on Actions Taken Since Last Report:

- This is the second report.
- A third meeting of the Working Group was held on March 24, 2022.
- Time was spent discussing the current draft of the finance centralization organization chart.
 - It was agreed that dotted lines needed to be added to clarify that the finance leaders for each area also have a working relationship with their Dean/VP and that no drastic changes will occur in the day-to-day operations.
 - John Crawford made it clear that the changes involving people moving in and out of the Division of Finance would be zero sum with no extra cost incurred. Deborah Wright's team has members in all the working groups and are reiterating that centralization will not result in additional cost to the university. They are also ensuring that funds end up in the correct units.
 - Detailed financial organization charts have been received by all the colleges and Student Affairs. John Crawford is in the process of getting those same charts from the units within the Division of Operations.
 - The chief financial officers at Ag, Engineering, and the HSC will have a dotted line to John Crawford and a solid line to their Vice Chancellor and Deans.
 - John Crawford is working with Damon Slaydon to finalize decisions about those staff members who currently have both financial and human resources responsibilities.
 - There is recognition that the organization chart may still need to be tweaked.
- Future meetings will be held monthly.

Next Major Issue to be Addressed:

- 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, physically moving some personnel, 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