

FBO/BAO Partnership Retreat

The Path Forward

December 6, 2017



Welcome

FBO & BAO Partnership *n.* A collaborative working relationship of FBO staff & BAO members to achieve a common goal(s) and objective(s)

Proposed FBO & BAO Partnership Goal

Develop & strengthen the FBO & BAO partnership to improve operational efficiency and effectiveness and achieve excellence in business processes across the University.



Objectives for Today

- Share the FBO Strategic Priorities and the divisional goal setting process
- Review the proposed FBO/BAO partnership goal and objectives
- Confirm 2016 SWOT data associated with each proposed objective; identify approach to address
- Outline a path to move forward on goals and objectives



Agenda

Morning

- Program kick-off
- FBO Strategic Priorities and FBO/BAO Partnership
- Partnership Benefits and Concerns
- Using the Partnership to address SWOT Weaknesses



Agenda

Afternoon

- Recommending Approaches to Address Issues
- Outline a Path to Move Forward
- Identifying Areas of Interest
- Wrap-up/Close



Brief Introductions

- Name
- Role / SCD
- Years in role



Proposed Session Guidelines

- Be Present
- Contribute your ideas
- Respect for ideas of others
- Listen to understand
- Step Up / Step Back



FBO Strategic Priorities 2018-2021



2018-2021 FBO Strategic Priorities and Goals

WSU Focus Area/Goal	Proposed FBO Strategic Priority	Proposed FBO Division Goals
Financial Sustainability & Operational Excellence	1. Ensure WSU financial health and vitality	<ul style="list-style-type: none"> a. New tuition model & structure b. New budget model c. Improved & effective financial controls d. Address SOM/UPG financial issues e. Enterprise risk management f. Identify, applaud, & implement financial & budgetary best practices within SCDs g. Increase return on cash & grow endowment
All 7 Strategic Focus Areas	2. Be a “Best Place” to Work	<ul style="list-style-type: none"> h. Foster an inclusive and engaging environment to retain valued staff & support WSU as an employer of choice i. Develop a total rewards philosophy to enable WSU to attract, retain, and develop the top talent j. Innovate in labor management practices to be a model for strength in partnerships k. Become a talent management leader
All 7 Strategic Focus Areas	3. Align WSU physical space with 2028 Campus needs and ensure it delights all who visit/study/work here	<ul style="list-style-type: none"> l. Develop 10-year Facilities Master Plan m. Integrate facility & space management with new budget model n. Develop 10-year capital financing plan o. Implement “Facilities Forward”
Financial Sustainability & Operational Excellence	4. Create a culture of service through continuous improvement and collaboration	<ul style="list-style-type: none"> p. Improve internal & external customer service (e.g. Banner 9) q. Develop & implement a continuous improvement framework r. Improve Client Services by streamlining processes and providing easily accessible data & analytics s. Leverage partnerships to advance University-wide goals & positively impact the local community



Table Activity

- Review the FBO Strategic Priorities and Division Goals on the chart at your table
- Identify all Division Goals where you see an opportunity for FBO and BAO collaboration to achieve the divisional goal
- Place a dot by those goals
- Select a table group member to share your chart results with the larger group



FBO & BAO Partnership Goal & Objectives



Proposed Goal:

Develop and strengthen the FBO & BAO partnership to improve operational efficiency and effectiveness and achieve excellence in business processes across the University.

Proposed Objectives:

1. Collaboration & Communication:

- a. Increase collaboration and enhance two-way communication between all FBO units and BAOs to improve understanding and appreciation from each perspective and work together toward common goals.
 - b. Identify and incorporate school, college and division (S/C/D) business unit needs and input throughout new system implementation projects, the operational policy review and revision process and decision making processes that define and impact the day to day business practices within S/C/D units.
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2. Policy & Procedural Development, Application & Compliance

- a. Collaboratively improve standardized procedures and consistency of policy application and compliance through communication, documentation and training:
 - i. **Triage and Review of Process Breakdowns:** Identify, prioritize and review process breakdowns which are impacting operational efficiency and effectiveness. Assemble a group of impacted stakeholders and perform a quick business process review to identify the problem, brainstorm both short-term and long-term process revisions or corrections, implement the short-term fixes and revisit the implementation to assess the success.
 - ii. **Internal control:** University wide, develop and sustain an effective environment of internal control over accounting and financial reporting to reduce the risk of errors or misstatements in financial and budgetary data, protect University assets and improve policy application and compliance.
 - iii. **Daily operations:** Develop and implement standardized, relevant, best practice policy and procedural communications, documentation and training.
 - iv. **Financial reporting:** Develop monthly, quarterly and annual standardized financial and budgetary reporting practices in conjunction with Banner 9 and New Budget Model report development; develop and implement related policy, procedure and training.
 - v. **Financial sub certification:** Identify established financial sub-certification policies and procedures in higher education and evaluate best practices, develop and implement related policy, procedure and training.
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3. Development of Business Professionals

- a. Collaboratively develop and deliver BAO and staff functional training (informed by policy and procedural development, application and compliance work above) to enhance consistency in practice and standardization of work products.
 - b. Provide BAO leadership opportunities to develop and retain strong business professionals across the University.
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Table Activity

- Refer to your notes from the Pre-retreat preparation
- Share your potential partnership benefits with table members – reach consensus on what your table group views as the most important 3-5 benefits of the partnership and its proposed goal/objectives
- Follow same process with concerns – reach consensus on 3-5 key concerns about the proposed partnership goal/objectives
- Prepare to share your table's conclusions in a group discussion



Addressing SWOT Weaknesses with the FBO/BAO Partnership



WEAKNESSES¶

*POLICIES:¶

- Too many systems/forms¶
- Excessive rules and regulations¶
- Vague policies (Some policies are vague, can be interpreted in different ways)¶

GOALS¶

- Enhance BAO/Management understanding of policy making process and implementation¶
- Proper announcements of new policies (i.e. New maternity policy used by FMLA Source)¶
- Timely update of all related policies¶
- Timely communication to BAOs¶
 - Attend meetings to hold them accountable¶
 - Follow up with policy owners to get timely updates¶
 - Send electronic communications¶

¶

*PROCEDURES¶

GOALS FOR BAO RESPONSIBILITIES:¶

- “Less transactional” and more strategic thinking (short and long term)¶
- More delegation¶
- Assess and evaluate BAO involvement in approval process¶



Proposed FBO/BAO Partnership Goal:

Develop and strengthen the FBO and BAO partnership to improve operational efficiency and effectiveness and achieve excellence in business processes across

Proposed FBO/BAO Partnership Objectives:

Objective	SWOT Weakness: Category	SWOT Weakness: Related Goal
1. Communication & Collaboration		
a. Increase collaboration and enhance two-way communication between all FBO units and BAOs to improve understanding and appreciation from each perspective and work together toward common goals	1. Policies	Proper announcements of new policies (i.e. New maternity policy used by FMLA)
	2. Policies	Timely communication to BAOs 1. Attend meetings to hold them accountable 2. Follow up with policy owners to get timely updates 3. Send electronic communications
	3. Information Systems	Better communication/collaboration use of current C&IT expertise in matching up
	4. Central Service & Communication	Create listserv for central to disseminate information
	5. Communication among BAOs	Communication support resources to succeed
b. Identify and incorporate school, college and division (S/C/D) business units needs and input throughout new system implementation projects, the operational policy review and revision process and decision making processes that define and impact the day to day business practices within S/C/D units.	6. Procedures	Decentralized process decisions should be collaborative (i.e. Cashnet, Wayne)
	7. Information Systems	Improved planning and strategic decision making (high and low)
	8. Central Service & Communication	Aligning resources with message from the top/down
	9. Central Service & Communication	Bi-annual retreat/Info sharing meeting with Council of Deans, BAOs, & Vice Pre 1. Everyone hears same message 2. Everyone can understand each other's point of view 3. Everyone can work collaboratively to solve issues
	10. Central Service & Communication	Changing the culture 1. Holding everyone from the top/down accountable 2. Transparency – everyone should know what their role is
	11. Central Service & Communication	Eliminate "silo" way of thinking
	12. Planning	Transparency in decision making
	13. Planning	BAOs, Deans and VPs cross collaboration with University leadership
2. Policy & Procedural Development, Application & Compliance		
a. Collaboratively improve standardized procedures and consistency of policy applications and compliance through communication, documentation and training in the following:		
i. Triage and Review of Process Breakdowns	14. Procedures	Policies in line with Best Practices
	15. Procedures	Labor intensive process should be assessed and evaluated for "value added" simp
	16. Information Systems	Partnering strength, communication/networking with S/C faculty to build into cur wide. Ex: Business school incorporating a service learning project
	17. Business Processes	Identify gaps in current business process
	18. Business Processes	Review key processes that support central activities (Travel Wayne, WayneBus Deans



Table Activity

Part 1

- Review your assigned 2016 SWOT items:
 - Decide if each item (SWOT goal and related weakness category) is still a relevant item that should be addressed through future efforts.
 - If not, cross out the item on your handout



Table Activity (cont'd.)

Part 2

- Meet with your designated “partner table.”
 - Review your responses with the other table for each assigned item
 - Reach consensus about whether each SWOT item is still relevant.
 - Be prepared to explain any items where you believe an update/change is warranted



Approaches to Address SWOT Items



How do we tackle these issues?

Different approaches based on nature of issue

1. FBO-led University initiatives with BAO involvement (e.g., Banner 9 project)
2. FBO and BAO collaborative improvement activities or initiatives
3. FBO-owned improvement activities or initiatives
4. BAO-owned improvement activities or initiatives



Table Activity

Part 1

- For each of your table's assigned items:
 - Discuss what you believe would be the most effective approach for addressing that issue
 - Record the code (1-4) for that approach in the column labeled "Approach to Action"



Table Activity (cont'd.)

Part 2

- Meet with your designated “partner table.”
 - Review your recommended approach for assigned items with the other table to reach consensus on an approach
 - Record your consensus recommended approach for each item on the new form provided for your discussion
 - Forms will be collected at the end of the activity



**A Path to Move Forward:
Using the BAO Meeting
in a New Way**



An Opportunity for Change

Reasons for change?

- Create an opportunity to engage the membership in thoughtful, focused, continuous quality improvement activities to address SWOT weaknesses and related goals within the framework of the FBO/BAO Partnership
- Provide time for impactful collaboration between BAO membership & central staff
- Let's try something new without creating a new meeting



New Format & Focus Overview

Five Meetings Focused on Continuous Quality Improvement:

- Identifying solutions for process challenges
- Best practice implementation opportunities
- Training development needs

Remaining Seven Meetings Focused on Information Sharing:

- Tracking and reporting on focused topic progress
- Project updates from member participants i.e., RCM, Banner 9, Deep Dive
- Scheduled presentations i.e., current agenda items



2018 Meeting Overview

January (transition)

March

May

July

September

- **Continuous Quality Improvement Focus**
 - Collaborative Working Meeting Format
 - Attendees: Both BAOs and FBO Leaders and related staff
 - 2 hour duration

February

April

June

August

Oct, Nov, Dec (year-end)

- **Information Sharing Focus**
 - Presentation Meeting Format
 - Attendees: Primarily BAOs and Presenters
 - Current 1.5 hour duration



Collaborative Working Meeting Format

- Extend to 2hr meeting, 1:30 – 3:30pm
- Round tables with six-eight people
- Attendees to include BAO membership and central staff best able to impact and implement change for the meeting's topic
- One process improvement, best practice implementation or training development topic per meeting



Presentation Meeting Format

- Existing 1.5hr meeting, 1:30 – 3:00pm
- Conference seating or group's preference
- Attendees to include BAO membership and presenters
- Standing Agenda Items:
 - Continuous Improvement topic updates
 - University project participant updates
- Additional Agenda Items:
 - Presentations on relevant topics impacting business affairs operations
 - When possible general presentations would be moved to the Administration Conference Agenda



Moving Forward

- Use the output from this retreat to identify topics for the collaborative working meetings throughout 2018 (January 2018 meeting)
- Coordinate FBO lead/staff attendance to reflect topics chosen for 2018
- Review and evaluate this approach in October 2018 for continuance in 2019; make adjustments



Feedback and Discussion



Wrapping Up



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FBO & BAO Partnership Retreat

Area of Interest

Name: _____

Below, please circle the partnership objective(s) in which you may have interest in planning, committee or work group activities:

- Collaboration & Communication
 - Efforts to increase & enhance two-way communication
 - Participation in a University level project or committee
- Policy & Procedural Development, Application & Compliance
 - Triage and Review of Process Breakdowns
 - Internal Control
 - Daily Operations – *Standardized relevant, best practice policy and procedural communications, documentation and training*
 - Financial Reporting
 - Financial Sub Certification
- Development of Business Professionals
 - Development/delivery of training materials
 - Participate in leadership opportunities



Thank You!

