

**Controller's Unit  
Organizational Alignment  
Human Resource and Payroll Forum**  
*February 18, 2022*



**Oregon State  
University**



# Why consider our business model?

- Business Operations Review (BeaverWorks) goals and excellence documents for functional areas
- Leadership over functions (currently we have seven ways within a single function)
- Strategic activities should be close to the unit
- Routine, high-volume transactions need to be conducted more efficiently and effectively
- Align with HR, IT and RO
- Address technology deficits



# CU Alignment Goals

- The Controller's leadership team has established the following goals for Organizational Alignment;
  - Provide valuable partnerships in service to the university mission and align business processes with DFA Principles.
  - Clarify roles and responsibilities.
  - Address capacity and budgetary constraints.
  - Provide professional development pathways for unit staff.



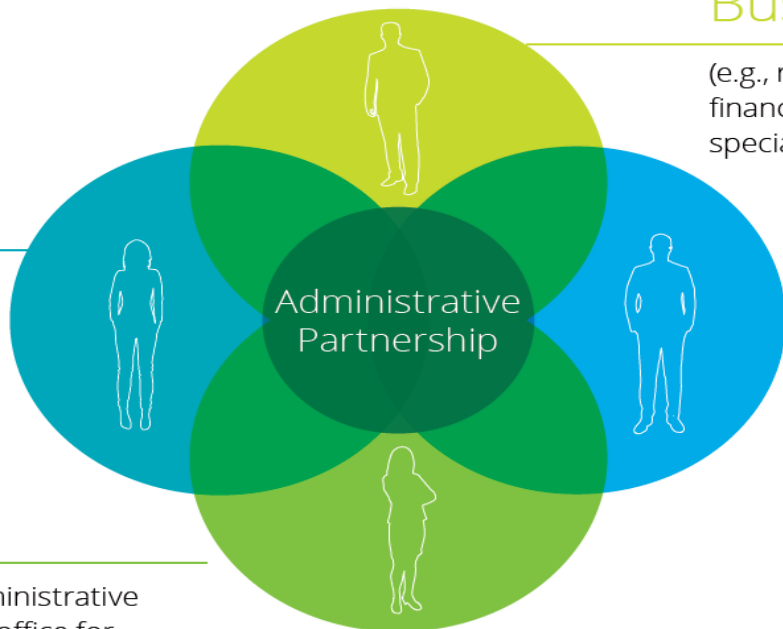
# Administrative Partnership Model

## Local units

(i.e., the “customers”)—faculty, staff, and students within schools and departments that initiate administrative requests and/or perform administrative work locally

## Business center

(e.g., administrative business center, administrative business office, and service center)—an office for routine, high-volume transactions and service-oriented help desk support; supports high-quality service provisions from the initial request through completion by effective end-to-end workflow, and tracking and measuring key metrics such as turn-around times, accuracy, and customer satisfaction



## Business partners

(e.g., representatives from human resources, finance, research administration, and IT)—specialized professionals working in local units

## Centers of expertise

(e.g., central HR and university budget office)—university-wide support for policy, compliance, and highly complex/specialized activities across administrative areas



# Administrative Partnership Model Benefits

- Lends to a financial strategic partnership model
- Customer Focus – proactively manages the partnerships and focuses on efficiently delivering services that meet business partner needs.
- Performance Measurement – measures its performance continuously (e.g. cost, quality, timeliness, customer value) to ensure it is delivering value to its customers and the organization.
- Continuous Improvement – drives a culture of continuous improvement to stay on top of best practices and further reduce costs, among many other benefits (e.g. reliability, accuracy, timeliness, cross training, professional growth opportunities and strengthened internal controls).

# Milestones

- ✓ Shared vision for feedback

**Spring/Summer  
2021**

- ✓ Leadership positions
- ✓ FSPs and financial strategic services
- ✓ Share specifics with stakeholders and continue adjust to feedback

**Winter 2022**

**Fall 2021**

- ✓ Adjustments based on feedback
- ✓ Deeper engagement in CU
- ✓ Pilot future state in payables, receivables, and payroll
- ✓ Leadership PDs

**Spring 2022  
and beyond**

- ✓ Assign staffing in FSS, AP, Receivables, and PR
- ✓ Cashiering to Treasury
- ✓ Resource allocation transparency
- ✓ Research Administration with RO
- ✓ Space planning



**Vertical:**  
 Functional Leadership  
 Business Process  
 KPI/Metrics  
 Resource Allocation

**Horizontal:**  
 Mission Accountability  
 Client Interface  
 Financial Stewardship  
 Decision Support

**Financial Strategic Services (FSS)**

- Internal Reporting
- Budgeting
- Accounting
- Financial Analysis
- Research Administration (Pre-Award, Grant Accounting, Post-Award)
- Specialized Buying

**Business Services**

- Student Billing
- Billing for goods & services (Fee Book)
- Payroll

**Vendor Payments & Strategies**

- Travel & Expense
- Accounts Payable
- ePro

**Treasury**

- Debt Management
- Cash Management
- Depository Services
- Merchant Services
- Banking Relationships and supplier check writing

**Financial Accounting & Reporting**

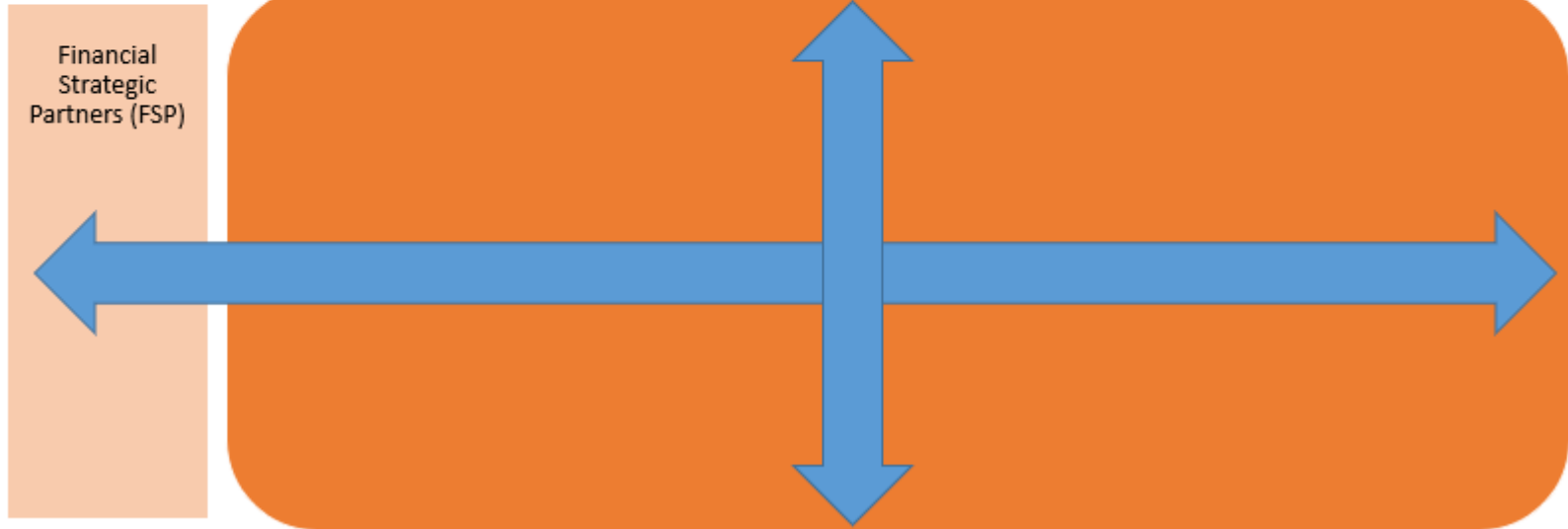
- External Reporting
- University Wide Analysis
- Accounting
- Tax Office
- Fiscal Policy Office
- Audit Coordination
- Property Control
- F&A Rate

Local Units

Business Partners

Cross functional team dedicated to supporting unit. Functional staff are under common leadership for business policy and process to support high-quality service from initial request through completion. Highly effective end-to-end workflow, tracking, and measurement of KPI's.

College/Unit A  
 College/Unit B  
 College/Unit C



Technology Resources and Platforms