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

The Administrative Partnership Model: Rethinking the approach to shared services in higher education.

Deloitte Development LLC
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

Spring/Summer 2021
- Shared vision for feedback
- Adjustments based on feedback
- Deeper engagement in CU
- Pilot future state in payables, receivables, and payroll
- Leadership PDs

Fall 2021
- Leadership positions
- FSPs and financial strategic services
- Share specifics with stakeholders and continue adjust to feedback

Winter 2022
- Assign staffing in FSS, AP, Receivables, and PR
- Cashiering to Treasury
- Resource allocation transparency
- Research Administration with RO
- Space planning

Spring 2022 and beyond