

SHARED SERVICES

Project Manager: Kathy Attebury

% Complete: 100

Description: This project will analyze opportunities to share administrative functions across campus units, departments, and colleges to improve information sharing, training and operational efficiency across the university and implement a pilot center to determine feasibility of full-campus implementation.

Status: The Office of Shared Services began providing accounting, budgeting and human resources support to a variety of clients beginning in spring 2015. Its clients include nearly 20 departments including the Office of the President, Administration and Finance, the Library and Extended University.

The pilot phase is complete. Next, the infrastructure necessary for full rollout to campus will be developed and implemented. As such, responsibility has been transferred from OpenMSU to the new Shared Services manager and the Associate Vice President for Financial Services under the sponsorship of the Vice President for Administration and Finance.

ELECTRONIC DOCUMENT MANAGEMENT AND WORKFLOW

Project Manager: Laura Humberger

% Complete: 80

Description: Implement electronic Document Management and Workflow functionality to replace many of the current paper-based approvals and notifications performed throughout campus. Document Management and Workflow are separate projects, but are coordinated.

Document Management Status: A 4-campus needs analysis was conducted, and document types for each business area have been identified. The Banner Document Management (BDM) functionality has been successfully implemented on one or more campuses for:

- Registrar's office
- Admissions office
- Purchasing Card receipt documentation in select colleges and campuses
- Invoice payment records

Criteria have been developed which will be used to determine the priority and timeline of each department's/function's full rollout.

Next steps include applying the prioritization criteria to the various document types, and finalization of a rollout timeframe.

Workflow Status:

Banner approval queues is in use for invoice review and approval on all campuses. An inventory of other manual processes that may benefit from an electronic workflow has been developed. As with document management, prioritization criteria will be developed and processes to be transitioned will be ordered according to their priority by a cross-functional group. Software solutions for implementing workflow will likely involve best-of-breed depending on the function (such as ATS for HR-related documents and Banner for invoice documents), rather than one all-encompassing campus solution. Upon development of the full inventory and prioritization, the project will then be moved into ongoing business in the Enterprise IT Governance Council framework.

SERVICE EXCELLENCE

Project Manager: Betsy Webb

% Complete: 75

Description: Developing a culture of service excellence among staff and faculty is a vital part of a productive and efficient campus working environment. All individuals in the university community, including senior leadership, must foster a spirit of service excellence. This project will train and empower staff to provide great customer service.

Status:

- Teri Yanovitch engaged as consultant for process (“Unleashing Excellence”).
- MSU Service Philosophy defined by MSU leaders.
- MSU Service Standards are safety, courtesy, reliability and competence.
- A Service Excellence Team formed to manage process.
- Developed the Service Excellence Website www.montana.edu/serviceexcellence.
- 5 full-day workshops provided to 150 leaders on campus March 28, 29, 31, April 1, 2.
- 15 MSU employees trained to facilitate Service Excellence workshops.
- Service Excellence Workshops are being offered on campus. Roughly 50 workshops for over 1000 MSU employees have been conducted to date. A condensed workshop has been developed for student workers. Extension Annual Conference in 2015 offered a condensed workshop while agents from across the state were in attendance on the Bozeman campus. There is a current effort underway to adapt and shorten the 3-hour workshop for faculty in AY2017.
- The Annual Employee Recognition celebration organized around the Four Service Standards of Safety, Courtesy, Reliability and Competence.
- Facilitated follow up meetings are available to units who have completed Service Excellence workshops. The follow up sessions assist units in identifying processes that can be improved specific to the units.
- A Service Opportunity System is in the development phase that will allow for service obstacles that cross departmental lines to be examined and addressed by a leadership group.
- A Manager’s Tool Kit has been posted and is available on the website.
- The Recognition subcommittee has developed “Random Acts of Excellence” postcards which are available to recognize excellence (template posted on the website).

HR RECRUITMENT

Project Manager: Cathy Hasenpflug

% Complete: 100

Description: This project will analyze and improve the recruitment and hiring process to reduce time-to-hire and process inefficiencies. The project will incorporate talent acquisition management software to automate the recruitment process through a user-friendly web interface that enables ease of use for applicants, recruiters, and search committees. Automating the recruitment process will improve operational efficiency, decrease time to hire, and reduce frustration across the institution.

Status: The Human Resources Office (HRO) has implemented the Applicant Tracking System (ATS) for all four campuses and redesigned recruiting/hiring processes in conjunction with this technology implantation. These actions are intended to streamline the recruitment process, reduce time-to-hire and increase the number of applicants for positions at MSU.

In addition, the Jumpstart program consolidated and improved the new hire onboarding process.

FRONT END TO BANNER

Project Manager: Laura Humberger

% Complete: 100

Description: Banner Finance does not provide certain user-friendly functionality that is desirable and necessary. CatBooks, an internally developed software program, is currently used to supplement Banner but it is not a viable long-term solution. This project will implement a permanent, consistent solution to accounting “shadow” systems and provide a front end to Banner Finance.

Status: Initial scoping meetings took place to investigate whether new software, re-implementation of Banner Finance or some combination of these options was the best solution for the university. It was determined that CatBooks will continue to be the best option.

SERVICE PROVIDER DEVELOPMENT

Project Manager: Betsy Webb

% Complete: 100

Description: This project will develop and maintain ongoing structured training for administrative service providers.

Status: The Professional Development & Training (PD&T) manager was hired in February 2013. The PD&T manager created the Financial Development Certificate program and Management Development Certificate. Monthly PD&T sessions are being offered on various topics and customizable PD&T workshops are available for departments and teams (e.g. retreat facilitation, strategic planning, team building, etc.). Other training programs and curriculum are being developed and presented.

HR PAYROLL PROCESS

Project Manager: Cathy Hasenpflug

% Complete: 90

Description: The payroll process improvement project is intended to reduce cycle times, increase the capacity of the HR Office and meet campus demand for improved HR processes.

Status: Human Resources has determined that that demand for improved payroll processes was mostly driven by challenges with the EPAF process. The redesign of the EPAF workflow appears to have reduced bottlenecks that affected payroll. In addition, the Jumpstart program has significantly streamlined the new hire payroll/first paycheck process. Finally, an enhanced online paystub was introduced, and the departmental payroll report is currently being redesigned.

PAYMENT & PROCUREMENT PROCESSES

Project Manager: Laura Humberger

% Complete: 70

Description: Payment Processes- A review of the procurement process, from initial request through payment to vendor, will identify inefficiencies, duplication of effort, and opportunities for automation. The outcome will simplify the procurement process and related reporting. Furthermore, the Banner Payment Authorization process is labor-intensive and addressing the inefficiencies will reduce administrative overhead.

For Banner Payment Authorizations (BPA), implementation of Banner Approval Queues has decreased time from invoice receipt to payment. The use of APEX forms for BPAs allows for easier data entry.

The purchasing card process is being redesigned and automated in conjunction with the implementation of the electronic document management (EDM) solution, another OpenMSU project. The purchasing card process was identified as the first pilot for application of EDM technology because the process already includes a decentralized electronic record and because of the process's multi-campus applicability.

Description: Strategic Procurement - Significant efficiencies and cost savings may be possible through more strategic procurement methods, such as greater use of negotiated discounts.

Status: An independent consultant has analyzed MSU's office supplies spend, and staff is working with them to propose specific changes to save time and money. Additional areas of spend will be forthcoming.

HR EPAF PROCESS

Project Manager: Cathy Hasenpflug

% Complete: 100

Description: This project will streamline the Electronic Personnel Action Form process.

Status: Human Resources redesigned the EPAF workflow and introduced automated error notifications. In addition, a new EPAF workflow and "mass apply" has reduced delays in student worker system access and time to 1st paychecks. HR has enabled new-hire immediate system access by redesigning EPAF workflow (Jumpstart pilot program).