

MSU INVESTMENT PROPOSAL FOR INSTITUTIONAL PRIORITIES

PROPOSAL OVERVIEW

Title	Automation, Efficiency & Compliance	Request Date	January 2012
Department	Admin & Finance Systems Team	Email	lhumberger@montana.edu
Requestor	Laura Humberger	Phone	406-994-4361

STRATEGIC ALIGNMENT

Core Themes and Objectives (check all that apply)

Educate Students

- Our graduates will have achieved mastery in their major disciplines
- Our graduates will become active citizens and leaders
- Our graduates will have a multicultural and global perspective
- Our graduates will understand the ways that knowledge & art are created and applied in a variety of disciplines
- Our graduates are prepared for careers in their field
- We will provide increased access to our educational programs
- Communities and external stake holders benefit from broadly defined education partnerships with MSU

Create Knowledge and Art

- Students, faculty, and staff will create knowledge and art that is communicated widely

Serve Communities

- We help meet a fundamental need of the citizens of Montana by providing degree programs for our students
- We help meet the educational needs of the citizens of Montana by providing a wide range of educational opportunities to a variety of students
- Our students, faculty, staff, and administrators reach out to engage and serve communities
- Our students, faculty, staff, and administrator reach in to build the university community

Integrate Learning, Discovery, and Engagement

- Each graduate will have had experiences that integrate learning, discovery and engagement
- Outreach activities will educate students and address the needs of the communities we serve
- Students, faculty, and staff will create knowledge and art that addresses societal needs
- MSU is a community that will be characterized by synergy within and across disciplines, roles and functions.

Stewardship

- The public trusts the institution to operate openly and use resources wisely
- The faculty and staff are well-qualified and supported
- MSU will support Native American students, programs, and communities
- MSU will be an inclusive community, supporting and encouraging diversity
- Our publicly provided resources are used efficiently and effectively
- Natural resources are used efficiently and sustainably
- MSU nurtures a culture of resource conservation and ecological literacy among students, faculty and staff
- Our physical infrastructure (e.g., building, equipment, open spaces) will be well-maintained and useful

INSITUTIONAL BENEFIT						
Campuses	<input checked="" type="checkbox"/> Bozeman <input checked="" type="checkbox"/> Billings <input checked="" type="checkbox"/> Havre <input checked="" type="checkbox"/> Great Falls <input checked="" type="checkbox"/> FSTS <input checked="" type="checkbox"/> Extension <input checked="" type="checkbox"/> MAES					
Cross Depts	Please List: All departments on all campuses will benefit					
TIMEFRAME						
Proposed Dates	Start: July 2012		End:			
COST AND REQUIREMENTS						
Funding Type	One-Time (\$)	Multi-Year (\$)			Base (\$)	FTE
		Year 1	Year 2	Year 3		
Personnel (w/benefits)					\$70,000	1.0
Materials & Supplies						
Travel						
Contracted Services						
Capital	\$2,000					
Other Operations						
TOTAL	\$2,000				\$70,000	
Please comment, if necessary, regarding cost and requirements.	One System Analyst is requested due to increased workload in the maintenance and use of the technological improvements that have been implemented in the recent past, and that need to be implemented to better support our faculty and staff in making processes more efficient.					

PROPOSAL SCOPE
Describe the Proposal

This proposal is for an additional System Analyst in the Admin & Finance System Support area. The finance office has been able to meet the workload demands of increased compliance requirements, better service to students, and increased efficiencies through the implementation of four-campus technologies such as student on-line fee payment, automatic feeds of data into the Banner system, automated scholarship billing to the Foundation upon cash draws, etc. There are many more technological improvements that need to be made so that our University can operate more efficiently; we are stuck in a paper world, though, without additional technical resources to implement and maintain these processes. For example, MSU has a license for, and the finance team has been using on a limited basis, Oracle Application Express (APEX) to create automated processes rather than manual ones. Additionally the team has worked with the ITC programmers to learn a user-friendly tool called MyApps that can streamline processes. All of these technological improvements make the increased workload of the operations staff possible, but need to be matched by additional technical personnel.

Some examples of improvements that will be made with increased staff include:

- Automated electronic approvals, rather than paper forms (hospitality approvals, out of state justifications, certain personnel forms)
- Student transaction routing (scholarship authorizations, grad student stipends)
- Updating and making changes to Course Fees and other student charges in the Inventory of Fees (currently a manual process)
- Contribution to a University-wide reporting tool (perhaps CatBooks for All)

There are many more efficiencies that could be implemented using these and other tools, with another system analyst. Additionally, the senior person in the systems team has been with the University more than 20 years, and is

looking forward to retirement in the next few years. The University's financial workings rely heavily on this person, and although the current System Analyst is being groomed for higher-level duties, these are not things that can be suddenly assumed; a long lead time to understand the nuances of the finance system is needed to ensure smooth running of the various interfaces, reports, etc., as well as the ability to meet current deadlines and compliance requirements, address new demands and improve efficiency.

PROPOSAL SCOPE

Describe the broader impacts and benefits of this proposal

The team maintains the Finance Reports, which we know are not user-friendly, and which we would like to replace with an ad-hoc reporting tool if we had the resources (something like CatBooks (aka AgBooks)). This would make all departmental administrative support lives easier.

This proposal fits in with the concept of OpenMSU, because making the departmental personnel's lives easier will be far easier to accomplish with another talented System Analyst who can do the behind-the-scenes work. This person also serves all four campuses, as does the entire Systems team, contributing to OneMSU.

The finance systems team performs duties that keep us in compliance with the IRS, the State finance office, and the OCHE data requirements.

The team assures outside audit compliance through smooth running of the financial statement extract, the NCAA report, and special ad-hoc reports as needed.

ADDITIONAL INFORMATION

Implementation Plan *(Please describe with timelines)*

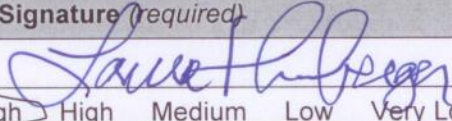
Based on the results of OpenMSU, priorities for this System Analyst will be set by those needing the services.

Assessment Plan *(Please describe with indicators)*

Results will be assessed in conjunction with Open MSU

If assessed objectives are not met in the timeframe outlined, what is the plan to sunset this proposal?

If additional productivity is not met, the FTE will be reduced back to former levels.

SIGNATURES		
Department Head <i>(please print)</i>	Signature <i>(required)</i>	Date
Dept Head Priority <i>(please circle one)</i> : Very High High Medium Low Very Low		
Dean/Director <i>(please print)</i>	Signature <i>(required)</i>	Date
Laura Humberger		1-11-12
Dean/Director Priority <i>(please circle one)</i> : <u>Very High</u> High Medium Low Very Low		
Executive/VP <i>(please print)</i>	Signatures <i>(required)</i>	Date
Executive/VP Priority <i>(please circle one)</i> : Very High High Medium Low Very Low		