

PROGRESS REPORT

Working Group Name: Centralize Financial and Business Services

Working Group #: 26

Chair: John Crawford

Date: May 2, 2022

Update on Actions Taken Since Last Report:

- This is the third report.
- A fourth meeting of the Working Group was held on April 26, 2022.
- Time was spent discussing changes made in the centralization organization chart since the last meeting as well as drilling down further into the organization chart.
 - Dotted lines and solid lines were added, as appropriate, to clearly indicate the reporting relationship to TAMU's Chief Financial Officer.
 - The colleges and divisions have been working on their internal financial structure to reflect what centralization looks like.
 - An AVP for Gift Oversight was added to the centralization chart. This is a result of discussions that have taken place in WG #29: Gift Oversight.
 - There have been significant discussions about how to centralize the three colleges that are being combined to form the College of Arts and Sciences. We cannot work ahead of WG #9: Formation of College of Arts and Sciences so that the finance structure aligns with their overall plans.
 - The Division of Operations centralization organization chart is still being developed.
- A plan is in the final stages of development to assign those individuals who currently have both HR and financial responsibilities to either the HR Division or the Division of Finance.
 - There has been considerable discussion about how staff members will be notified and how to prepare to answer the questions of those affected.
 - Budget implications of these moves is being closely monitored by the Office of Budget & Planning.
- Dr. Alan Sams, Vice President of Operational Innovation, attended this meeting. He briefly discussed that he is attending all 41 working groups to help ensure consistency across them all. Additionally, he will be incorporating metrics into working group actions.
- Future meetings will be held monthly.

Next Major Issue to be Addressed:

- Notifying those staff members who currently have both financial and HR responsibilities about which unit each is being assigned to.
- Finalizing budget reallocations resulting from the centralization process.

Problems or Barriers Encountered and Solutions Identified:

- Notification to affected staff may involve physically moving some personnel, and related Workday changes will require sufficient communication and HR support.

Deliverables Completed:

- The high-level organization chart has been completed.

Timeline for Completion of Remaining Deliverables:

- Identification of staff who will be part of Finance and Human Resources organizations – April 30, 2022. Notification to those staff members will be done in early May.
- Budget reallocations due to centralization – June 30, 2022
- Full implementation of the financial centralized structure – September 1, 2022