

March 15, 2018

Dear Colleagues:

I am writing to provide more detail on a number of related principles in support of greater decentralization of campus-wide administrative responsibilities to accomplish the following: (1) greater alignment of authority, responsibility, and accountability and (2) moving the decision-making processes closer to their points of impact. These changes will not only improve the efficiency and effectiveness of units within the university; they will also empower units, divisions and colleges by providing more control over decision-making.

With the advent of independence, Western operates in a competitive and somewhat volatile environment. While other universities in the state and adjacent areas are competing with us for students and state funding, key costs (e.g., PERS and healthcare) continue to remain outside of our control and are projected to increase markedly over the next 5-6 years. Moreover, the HECC funding model requires that we focus on recruiting, retaining, and graduating Oregon students. This allocation model places more emphasis on degrees granted than student credit hours. The new coin of the realm is degrees granted and student success. These changes are fully aligned with our strategic plan, *Forward Together*.

With the dissolution of the Chancellor's office, we are on our own and must act accordingly; however, because we are no longer a state agency, we are not required to comply with many of the state strictures. This freedom enables us to disentangle ourselves from unnecessary administrative details, duplication, and/or contradiction and to reshape our institution to respond to the changing environment in a timely, thoughtful, innovative, and strategic manner.

It's also time to take advantage of our new-found freedom by not only harnessing the capacity of our new Board of Trustees, along with the Foundation Board, but by also recognizing that every single member of the campus community has a stake in our success. We have made strides in developing a more inclusive shared governance structure. As we move forward, we will strive to provide you with fair and equitable compensation, comprehensive benefits, robust training opportunities, and a healthy, functional and transparent work environment.

The following ideas are based on dialog with campus groups, as well as best practices from other institutions, and has been reviewed by the President's Cabinet, Deans, Division Chairs, Board of Trustees leaders, and the University Budget Committee (UBC), who share our overarching views and goals. While we plan to move forward expeditiously, the process will be guided by inclusivity, transparency, and openness.

The proposed changes include:

- Simplified travel reimbursement: we eliminate the need for pre-authorization. Additionally, travel can be booked with Azumano or any other booking option using a procurement card

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or a personal credit/debit card. This will be accompanied by elimination of travel advances and employees are encouraged to utilize direct deposit to accelerate reimbursement. Direct deposits and checks for travel and other reimbursements and vendor payments will be processed twice weekly, generally on Tuesdays and Thursdays. One exception is that travel advances will be available to support athletic team or other student group travel.

- Simplified procurement: All departments will now be authorized to process all procurements with a total value of less than \$25,000. As per policy, procurements of less than \$5,000 need only one quote, and procurements between \$5,000 and \$25,000 need documentation of three quotes.
- Expanded use of procurement cards: To minimize the need for paperwork, we encourage the use of procurement cards. This allows departments to quickly and efficiently make purchases and is a cost-effective means of paying for multiple procurements with one payment to the procurement card provider.
- Simplified contract approval: Departments will be required to sign the agreement before the contracts officer signs. The signer is certifying that they have the budget to pay for the contract consideration, that they need the good or service to accomplish their mission, and that their department will administer and manage the contract upon execution.
- Improved budget development process: Each winter/spring the Vice President for Finance and Administration (VPFA) and staff will make a projection of revenues and expenditures for the coming fiscal year. This projection will start the process and determine whether we are in an investment mode or reduction mode, thereby dictating the process to be used. The UBC will be involved throughout the process, reviewing projections and any notifications or instructions sent to units. Once the budget is approved by the Board, it will be loaded into Banner. At that point, divisions/departments will be expected to adhere to their total budget for the remainder of the fiscal year. Colleges/Divisions/Departments will be free to move budget from one category to another (including OPE and student pay), as long as the total College/Division/Department budget is not changed.
- Other Changes: Registration holds and restrictions on the use of the recreation center will no longer be placed on students for any debts owed in the current term. Registration holds will only be placed if a student owes a past term debt of \$200 or more. This should eliminate many of the registration holds and free our students and staff from this time consuming process.

Additional details concerning these changes may be found [here](#).

As a public entity, we have an obligation to be open and transparent in our operations and with our information. For this reason we have removed the partitioned security in Banner. This

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means that any user will be able to view financial information for any department or for the institution as a whole. Going forward, Western will conduct its affairs in an open, transparent and inclusive manner.

To better enable these changes as well as other changes being contemplated, I will be increasing staffing in University Computing Services to add programming capability. This additional staffing will position us to fully implement document management (digital imaging) for multiple applications, web-time entry, installation of additional modules within Banner, and to develop mobile applications that students can use on their smart phones to add/drop courses, view schedules, grades, debts owed, etc. In addition, this enhanced staffing will help in myriad ways to better improve services to our faculty, staff and students and provide better management information for decision-making purposes. These new staff will be fully funded from savings in recurring charges for Computing Shared Services due to our successful Banner Cloud migration.

Obviously, changes of the type suggested above will require that we bolster training programs to ensure that campus personnel receive instruction on the appropriate ways of making purchases, administering contracts, managing budgets, processing budget changes, etc. This training can be both group sessions using generic examples as well as one-on-one user-specific sessions in departmental offices using your equipment and examples.

It is my hope that these changes can be implemented soon; preferably before the start of a new fiscal year on July 1, 2018. You are encouraged to continue providing input and suggestions on how we can streamline and be more efficient and effective as we move forward. Please let me, Cabinet members or University Budget Committee members know if you have any comments or concerns about the issues and directions we are suggesting above or if you have other ideas for improvement.

Onward!



President

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