

**Pathway Goal:** Infrastructure and Shared Governance

**Action Item #**  
3-5

**Report:**  
 Mid-Year: December 2016  
 Year-End: April 2017

**Action Item Description:**

Address an array of urgent issues to improve business processes: financial account numbers.

**Submitted By:**

Name	Department
Nancy Rapoport	Office of the President

**Working Group Members:**

Name	Department
Brian Meyerpeter	Finance and Business: Controller's Office
Caleb Konnor	Finance and Business: Controller's Office

**Provide a written overview of the year-long process for your working group.**

2016-2017:

- Assess timing/tracking; develop (with transparency) systematic approach.
- Create a committee to review the entire process.
- Formulate a plan to invest necessary constituents.
- Recognize that financial account numbers issues relates to some faculty onboarding for faculty members who are bringing grants.

**2016-17 Accomplishments**

Caleb created a flow chart of the current steps and processes required in order to set-up new financial accounts. He has also identified organizational documents that could be created to guide the process, as well as a system to improve the process.

### Recommendations

Caleb is working on the next steps.

### 2017-18 Next steps

- What should the goals / activities be for the subcommittee?
- Who should be responsible?

Continue forward with Caleb following through with the initial conception.

**Please review the list below and “X” the appropriate box(es).**

- Potential resources required
- Any reports generated by this working group
- Metrics to be used
- No additional reference material

**Any additional information you wish to share.**