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.