Administrative Review and Restructuring Working Group

Report to the President and Chancellors

University of Illinois

June 15, 2010

Administrative Review and Restructuring Working Group

Final Report

Background and Introduction

In November 2009, President Ikenberry, in consultation with the Board of Trustees and the Chancellors, charged the Administrative Review and Restructuring working group to conduct an assessment of the organizational structure and delivery of administrative services at the University and to recommend a set of reforms and changes to improve performance as well as reduce costs.

Throughout its history the teaching, learning and research endeavors of the University of Illinois and the fulfillment of its land grant mission have contributed to its reputation and benefitted the people of the State. The working group approached its task recognizing that administrative services must support this core mission in important ways and must be delivered effectively as well as efficiently. In response to the President's charge, the group conducted a broad scale review of the University's administrative structure and operations including administrative functions performed at all levels of the organization—from the level of the university to the campuses, colleges, institutes and departments.

Like many public universities, the University of Illinois has faced significant financial challenges throughout the early years of the 21st century. State appropriations for the University have failed to keep pace with rising costs and increasing enrollment during this period. Since fiscal year 2002, the direct state appropriation has been reduced and redirected by over $130 million, or 16.2 percent, before adjusting for inflation. When inflation is taken into account, this translates to a reduction of nearly 30 percent. The problem has been exacerbated by a shortfall in payment of appropriated funds by the state that reached nearly half a billion dollars during this fiscal year. At the same time, costs of operations and capital needs, particularly maintenance and repair of an aging infrastructure, salaries, and other expenses have continued to increase. The entire university community has had to sacrifice in order to maintain the quality of educational offerings and other services expected at a preeminent research university. Students and their families have had to make up for the loss in general revenue funding from the State through higher tuition.

The University has a successful history of delivering quality administrative services in a cost efficient manner and, in recent years, administrative units at all levels of the organization have intensified efforts towards this end. The largest administrative initiative ever undertaken by the University was the UI-Integrate/Banner project completed in 2003, which wove a spider web of hundreds of legacy administrative systems into a set of centralized modules for key administrative services that can be maintained efficiently. It also allowed for a significant reduction in the central administrative computing staff.

In fiscal year 2004, in response to three consecutive years of state budget rescissions and reductions, the University developed an *Administrative Reduction Plan* that led to reductions in administrative costs totaling $37.4 million, including $5.75 million of compensation costs for 57 administrative positions that were eliminated over the course of an 18-month period. According to external

consultants engaged by the University in 2005, administrative overhead costs at the University of Illinois were the lowest among all Illinois public universities and seventh lowest among the Big Ten schools.

Beginning in 2008, the University began forward purchases of natural gas to create price certainty for fuel costs and introduced other measures to control rising energy costs. In fiscal years 2009-10, the University embarked on a three-year plan to reduce administrative costs by $15.05 million, half within university administration and the other half spread over the three campuses. The first year of the three year administrative cost reductions have already been completed.

The working group's effort builds on these past efforts and focuses on the major administrative service functions of the University—including information technology, development, alumni affairs, purchasing and strategic procurement, communications, human resource management, facilities management and capital programs—delivered by units within the university administration, campuses, colleges and departments. The working group also established subcommittees in a number of the areas comprised of subject matter experts from all three campuses and university administration. The working group's recommendations cover a wide range of strategies based on guiding principles such as:

- Clarify organizational structures to better align responsibilities with accountability and streamline the interface of administrative functions at different levels of the organization;

- Protect and invest in high priority essential services that support core academic missions;

- Avoid short-term budget reductions that create longer-term resource needs and/or deterioration in quality;

- Leverage the University's size and scale;

- Improve coordination and greater sharing of resources when this will result in better service and economies of scale and align like functions to gain synergy;

- Improve internal business practices and procedures and seek broader regulatory reform to improve efficiency while mitigating risks;

- Be willing to invest in advanced technologies to achieve efficiency of operations;

- Consider both insourcing and outsourcing, when such actions lead to reduced costs without sacrifice in quality; and

- Eliminate duplicative and non-priority services.

The proposals outlined in this report could cumulatively lead to annual cost reductions in the range of $50 to $60 million within two to three years and offer options for the University to pursue as it confronts an era of unprecedented financial challenges. The savings will accrue at multiple levels of the organization—from university and campus administrations to individual colleges and departments,

and will be across all fund sources. It should be understood, however, that investments in administrative services will still be required in order to improve business processes, meet compliance and regulatory requirements and respond to needs of new academic initiatives. Going forward, the fiscal pressures on the University resulting from reduced state appropriations and cost increases will be substantial and impossible to manage without a more disciplined approach to allocating resources and setting priorities for investments.

Directed by the guiding principles outlined earlier, the working group has compiled a list of over forty specific recommendations to achieve cost reductions, improve long-term efficiencies, clarify organizational structures, and establish systems to ensure effective delivery of administrative services. The remainder of the report begins with observations on the management structure at the University and recommendations regarding the organization of senior management. This is followed by recommendations pertaining to specific administrative functions; and the report concludes with some suggestions for developing a new vision for delivering administrative services at the University.

Organization of Management Structure

The University of Illinois is organized under a unified set of *Statutes* and *The General Rules*, a single Board of Trustees, a single state appropriation, and under a broad array of policies and purposes governing the entire university. At the same time, the University is characterized by distinctive cultures and programs among its campuses, with a high degree of delegated authority that provides needed flexibility to individual faculty members, programs and colleges to pursue academic excellence with a mutual sense of purpose and accomplishment.

The current executive management structure of the University—comprising a university president and campus chancellors—was established in 1966. The President operates within a broad delegation of authority from the Board of Trustees and exercises responsibility as the "chief executive officer of the University" and delegates and assigns responsibility to Chancellors, Vice Presidents and other administrators who have university-wide assignments. Under the direction of the President, the Chancellors have the responsibility to lead and manage the operations of their campuses. The President, Chancellors, Vice Presidents and other University Officers function as a cohesive team under the executive leadership provided by the President.

Within this configuration, there must be an appropriate differentiation in the duties of central university and campus administrative officers and between delegation of authority and responsibility on one hand and ultimate accountability on the other. The organizational structure and administrative practices of the University are guided by important operating principles and historic practices that have evolved over the years:[1]

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[1] For the purpose of this report the term "university" is used when referring to the institution as a whole and the terms "central or university administration" are used to refer to the level of administration that functions at the central university level.

➢ Working with the Chancellors, other University officers and the faculty, the President provides leadership for strategic planning activities of the university, preparing university-wide annual and long-term budget plans, coordinating the implementation of those plans in conjunction with appropriate campus and university officials, and overseeing resource allocation decisions consistent with those plans. The President and other general officers also provide leadership in establishing overarching human resource policies, and priorities for administrative and business services.

➢ The major financial functions of the university (treasury, capital, risk management, accounting, payroll, receivable and payables, bond issuance, etc.) are managed at the university-wide level through the office of the Chief Financial Officer (CFO), who is accountable to the President and the Board of Trustees for these core functions.

➢ University-wide regulatory, compliance and advocacy functions—viz., internal audit, government relations, university relations, legal counsel, BOT office, ethics office—are accountable and report directly to the President or his or her designee.

➢ Within this framework, each campus, under the leadership of the Chancellor, is responsible for developing academic and operating plans and campus priorities, allocating campus resources to individual units consistent with those priorities, managing academic programs, student recruitment, enrollment, and other student and campus administrative services. On behalf of the Board of Trustees, the university administration, under the guidance of the President, provides fiduciary oversight of these operations to ensure the long-term value of the University assets and the fulfillment of its mission.

As part of its deliberations, the Administrative Review and Restructuring working group reviewed the senior management structure of the University. The group concluded that the current organizational structure reflects the above principles well. However, it recommends that steps be taken to ensure greater management attention to a number of key strategic functions and that targeted modifications to the current executive management structure—those reporting directly to the President and Chancellors— be considered. Specifically, the group recommends:

- **Recommendation 1**: That the President, in consultation with the Chancellors, make necessary management assignments to ensure greater focus and accountability in three key areas: Integrated advocacy programs; training of health professionals and medical research; and human resource management and the development of human capital.

  o A University officer reporting to the President should be vested with the responsibility of developing and managing an integrated advocacy program in coordination with the Alumni Association, University of Illinois Foundation, and university and campus public affairs, alumni relations and governmental relations offices. There is a growing need for an integrated advocacy and external relations program to effectively communicate with the diverse external stakeholders of the University. As part of this effort, a Washington, D.C. presence is essential.

o The President and Chancellors are urged to consider ways to better coordinate the University's growing set of activities that deal with the training of health professionals and research in medical fields, as well as its linkage to key departments in state government, the various health-related agencies of the City of Chicago and Cook County, federal agencies, and other health partners around the State. Given the size, complexity, and importance of the University's Hospital and Clinics and the significant health-related research at each of the campuses, new organizational designs may be required to ensure full articulation of all of the University's health-related activities.

o Human resources are the University's greatest assets. A greater emphasis should be placed in developing a university-wide human capital strategy and to guide overall human resource policies by assigning these responsibilities to a senior university administrator. While the labor market and human resource environment is different for each campus and human resource operations should remain a campus responsibility, there is a need for the development of overall policies and principles—in coordination with the campuses—that will be applied by each campus in accordance with local circumstances. The University must also strengthen linkages with external agencies and organizations like the State Universities Civil Service System, the Department of Central Management Services, and the State Universities Retirement System.

- **Recommendation 2**: That consideration should be given to clarifying the dual role of the "Chancellor" at each campus in managing their own campuses as well as their role in assisting the President in the management of the entire University.

- **Recommendation 3**: That the positions of Vice President for Technology and Economic Development and Vice President of Academic Affairs should be consolidated into a single Executive Vice President (EVP) position. The new position should combine the responsibilities of the two current vice presidents but also bring greater focus and accountability for leading the development of policies regarding strategic planning, budgeting and resource allocation, human resources functions and a comprehensive responsibility for proactively assisting the President in these and other policy matters. The new EVP and the CFO should reorganize the operations of their offices along a shared services model with pooled resources as appropriate, including support staff, space and equipment.

Combining the economic development and academic affairs functions should not be viewed as detracting from the importance of either. Rather, such a combination, we believe, will allow the University to realize the synergies among the University's different missions by combining in one office the oversight of both academic research and infrastructure for development of that research. Functioning under authority delegated by the President, the new EVP will provide leadership to and have responsibility for the overall coordination of strategic and academic planning, resource allocation and budgeting functions of the University and assemble performance data essential to monitor progress and performance on behalf of the President and the Board. The EVP will work closely with academic leaders at each campus—especially Chancellors and Provosts—and with central university officers in executing the responsibilities

of this position. The EVP will also work closely with the University Senates Conference. The CFO will continue to be responsible for budget execution and financial management.

As in most other institutions, the senior management structures at the campuses are organized around vice chancellor positions that report directly to the Chancellor. There are seven vice chancellor positions at the Chicago campus, five at Urbana and two in Springfield. The working group recommends:

- **Recommendation 4**: That the organizational structure of each campus must reflect its unique foci, context, and scale, as well as its practices of resource allocation, delegation of authority, and decision-making. The Chancellors, in consultation with the President, should consider:

  o Reviewing the responsibilities of all Vice Chancellors and reassigning responsibilities as necessary with the objective of reducing the number of such positions.

  o Strengthening the working relationships among the Vice Chancellors to better align research, student services and administrative activities at each campus with the campus' academic priorities. This may entail a coordinating role for the Provost that may be accomplished by modifying the description of the duties of the Provost or by changing the title to that of Provost and Executive Vice Chancellor (EVC) to underline the full set of responsibilities carried by the position in a campus-centric model of administration. At the direction of the Chancellor, this should also entail the Vice Chancellors working in close collaboration with the deans of colleges and directors of schools and major research and academic units.

- **Recommendation 5**: That the process already initiated to review all senior administrative positions—assistant and associate vice chancellors, provosts and vice presidents—be continued. The process has resulted in the elimination or reorganization of a number of positions and reduction of over $1.76 million in recurring salary expenses. The working group urges that this review process be continued and targeted changes to the senior management structure be considered to further streamline the organization. Total cumulative to date and future savings resulting from these changes are estimated to be $3 million.

Delivery of Administrative Services

The remainder of the report focuses on the delivery of major administrative services at the University—development and alumni relations, purchasing and strategic procurement, facility management and capital programs, information technology, publications and communication, and human resource management. It also highlights the need to modify certain internal business processes, seek reform of regulations governing business processes, and the role of shared service centers in delivering business services.

Development and Alumni Relations

Many people, units and organizations are involved in fundraising and alumni relations activities on behalf of the University. For one, the University employs a team of professional staff—at the campus level, in individual colleges and in some departments—who focus on development and alumni relations activities. In addition, the University of Illinois Foundation (UIF) supports the University's fundraising efforts and the University of Illinois Alumni Association (UIAA) supports alumni relations.

Private giving and alumni engagement are critical to the University's future. The "Brilliant Futures" campaign launched in 2003 is creating sustaining resources for the institution and the UIAA is strengthening bonds with alumni worldwide. The working group is encouraged by these developments but sees the need for greater coordination among the University, the UIF and the UIAA, as well as between the campuses and their constituent colleges to improve effectiveness and reduce costs of the development and alumni relations efforts.

As an organizing principle for this function as it relates to the UIF, campuses and colleges, we recommend sustaining the hybrid model that draws upon that which is best done centrally and that which is best done by individual units. In addition, we endorse the adoption of a more proactive, campus-centric, advancement-oriented model that integrates the functions of development, alumni relations, corporate relations and communication activities under the Office of the Vice Chancellor for Advancement.

With these goals in mind, the working group recommends the following proposals for consideration:

- **Recommendation 6**: That to improve coordination of advancement-related activities, including government and corporate relations, form an Advancement Council, comprising the President, Chancellors, the Presidents of UIAA, UIF, the senior advancement officer[2] from each campus, and others as determined by the President. One of the major goals of the Council must be to increase collaboration and coordination among the three organizations. The partnership between the Illinois Connection program, managed by the UIAA, and multiple University offices provides a good example of how increased collaboration can enhance effectiveness.

- **Recommendation 7**: That the senior advancement officers on each campus currently serve as the campus liaison to the UIF and are Vice Presidents of the UIF and should also serve as campus liaisons to the UIAA.

- **Recommendation 8**: That the UIAA and the UIF jointly develop a program via a memorandum of understanding to continuously improve the alumni database.

- **Recommendation 9**: That the UIAA should develop a formal understanding of the services that it will provide to each campus in consideration for the service fee that it receives. The

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[2] Recommendations relate to the senior development-advancement officer on the campuses by whatever title s/he is known.

group also recommends a 15 percent reduction in that service fee ($3 million) in light of budgetary constraints.

- **Recommendation 10**: That an overall reduction and reallocation of $4.5 million in fundraising expenses (UIF and campuses combined) out of the current $33 million spent on fundraising be achieved.

- **Recommendation 11**: That the UIF work with the campuses to realign the "Regional Directors" program (to only the Urbana campus since Chicago maintains a central staff for this purpose) and the "Annual Funds" programs (to all campuses) such that they are more directly accountable to the senior advancement officers at each campus.

- **Recommendation 12**: That the UIF and the campuses jointly establish a process for monitoring performance of development professionals and establish expense control targets for units in relation to amount of funds that they raise. Some units have historically had high fundraising expenses in relation to the amount of funds they raise. The level of expenditures and resources should reflect fundraising potential. To enhance effectiveness, the senior campus advancement official must work collaboratively with the deans and directors to develop strategy, plans, and goals for advancement efforts of the campus and the units, establish clear targets and accountability for fundraising professionals, and create shared service centers to support college-level fundraising activities, especially for the benefit of smaller units.

Purchasing and Strategic Procurement

Each year the University spends over $300 million in purchasing supplies and services from all fund sources. A small portion of these purchases are made through strategic purchasing contracts that are actively managed. Most are made in a decentralized manner leading to vendor fragmentation and disparate pricing. Many universities and private corporations have obtained better prices and lowered transaction costs by leveraging their scale as a buyer through strategic procurement contracts. Past evaluations of the University's purchasing operations conducted by external consultants recommended greater use of university-wide contracts to consolidate decentralized purchases and greater use of technology to improve transaction processing in order to realize significant cost savings.

The University took a major step in implementing this recommendation in 2006 with the introduction of the iBuy platform for strategic sourcing. The iBuy application provides units with a convenient requisitioning and catalog shopping application. The current portfolio of university strategic contracts—representing approximately 20 percent of the targeted portfolio of supplies and services—has created opportunity for annual savings of $6 million. Additional cost savings may be gained by developing strategic sourcing contracts for a larger portfolio of supplies and services utilizing active contract management techniques to obtain best prices. Achieving even a *modest* 5 percent price reduction, which is well within the experience of other organizations, can result in total potential savings of over $22 million a year.

Central to the success in realizing savings is the implementation of a center-led procurement model. A center-led model should not be mistaken for a "centralized" model where all of the procurement

resources are located in one office. Rather, it refers to a structure that seeks to use the best resource to accomplish a particular procurement regardless of campus location while continually supporting the individual campus needs. Effective procurement cannot be accomplished without appropriate campus-based procurement resources. A center-led model helps to coordinate those efforts effectively and seeks to eliminate staffing redundancy so that staff can be redeployed for value added tasks or staffing consolidation can be accomplished over time.

Given the potential for significant cost savings and service improvements that will benefit virtually every unit in the University, the working group strongly recommends a sustained proactive effort to move to a center-led strategic procurement system that leverages the University's scale as a purchaser to reduce costs and to improve service. A few salient recommendations are noted below:

- **Recommendation 13**: That the University aggressively develop strategic purchasing contracts for high-usage supplies and services and increase use of such contracts by individual units. Eliminate current business practices that impede efficiency or utilization of cost savings opportunities.

- **Recommendation 14**: That the University actively renegotiate all existing contracts to seek improved service and lower costs.

- **Recommendation 15**: That iBuy, the online requisition and catalog hosting application, be affirmed to be the primary requisitioning application for all applicable procurement transactions. The cost of processing a purchase transaction through iBuy is substantially less than processing the same transaction through a purchase order or a credit card transaction.

- **Recommendation 16**: That the pattern of expenditures charged to purchasing cards (P-Cards or institutional credit cards) be reviewed and the goods purchased with P-Cards better controlled to optimize overall process efficiency and cost savings. Institutional credit cards are a best practice for low-value, immediate need transactions and the University's P-Card program is an integral part of the overall order-to-pay process. However, as the iBuy system implementation progresses, in particular with the addition of the electronic settlement module, many P-Card transactions can and should be migrated to iBuy.

- **Recommendation 17**: That the University selectively invest in automation and electronic workflow management systems (such as the e-settlement, on-line travel reimbursement, and contract management) to reduce processing time and effort for campus and administrative staff. Approximately 80,000 travel vouchers and over 10,000 contracts are processed each year. Greater automation in these two areas alone could result in significant efficiency gains and cost savings.

- **Recommendation 18**: That vacant positions be used to recruit purchasing professionals skilled in strategic buying and contract negotiations to support transition to a strategic-focused organization.

- • **Recommendation 19**: That campus-specific campaigns and programs be developed to increase participation in iBuy and utilization of the portfolio of strategic sourcing contracts by academic departments and units across the University.

Information Technology

University spending on information technology is currently estimated to exceed $250 million per year, including hardware, software, services, supplies, and personnel. As is typical for other research universities, about one-third of this spending is managed centrally at the university-wide or campus levels, and the remaining two-thirds is spent directly by academic departments, colleges, institutes, centers and administrative units. Thus, a successful strategy for streamlining IT functions and improving performance must provide for better management of IT at every level of the institution—not just centrally.

A successful strategy also requires a change in how we assess IT investments. To make good investment decisions one must differentiate between IT expenditures that are truly strategic and spending that is nonstrategic, even though it may be necessary for doing business. We suggest the following typology:

- ➢ Strategic IT investments: planned expenditure on IT that can distinguish the University's performance of its core missions (teaching, research, public service, and economic development).

- ➢ Tactical IT investments: planned expenditure on IT that can reduce the cost of necessary business functions through automation or process improvement.

- ➢ Operational IT spending: IT spending that may once have been strategic or tactical, but that is at present simply a necessary expense to provide IT services and operating the IT infrastructure.

An ideal expenditure reduction strategy for the University would protect strategic investments, improve the yield from tactical investments, and reduce operational spending in ways that have no negative impact on the mission. Based on these principles, the group focused on urgent investment priorities and on cost reduction methods that can be confidently expected to produce large savings. Cost reduction methods with smaller expected yields should be considered as part of follow-up activities. The group's recommendations are:

- • **Recommendation 20**: That the role of the University Technology Management Team (comprised of the five chief information officers representing the three campuses, the Hospital, and university administration) be strengthened in coordinating strategic planning to help achieve more university-wide policies that govern the direction and use of IT services at all levels of the institution.

- • **Recommendation 21**: That continued strategic investments in technology be made to support the core mission and enhance revenues. Examples of near-term investments include

technology to enhance online learning environment, positioning the university to compete for major sponsored projects and creating electronic medical records.

- **Recommendation 22**: That, with due deliberation and analyses, tactical IT investments be made to support administrative functions by enhancing the capabilities of the University's Enterprise IT system to improve business processes and cost monitoring; and converting inefficient paper-based processes to electronic workflows.

- **Recommendation 23**: That operating costs be reduced by improving efficiency in delivering IT operational services. The following are some examples for reducing operating costs:

    a. Reduce expense of maintaining enterprise system (Banner) by in-sourcing software modifications

    b. Appropriately reduce portfolio of application software

    c. Consolidate data centers and decommission small server installations

    d. Consolidate e-mail and calendaring services

    e. Implement a method for reducing power consumption for personal computers

    f. Support desktop technology more efficiently through selective standardization

    g. Shift from Centrex voice service to converged voice and data communications

    h. Expand reliance on cloud computing and other rapid-response outsourcing

Potential savings from the actions recommended here are estimated to accumulate in the range of $17-$19 million per year by fiscal year 2013 and will accrue at all levels of the organization. Savings will come in the form of actual dollars saved as well as avoidance of future costs. It needs to be stressed, however, that there will be continued need to invest in IT in order to build more efficient service delivery systems and to meet the needs of new academic initiatives.

Human Resource Management and Personnel Policies

The talent of the people who work at the University is its major asset. The University of Illinois is a major employer, with a large workforce of permanent, part-time and temporary staff. Personnel costs represent seventy percent of the University's operating budget. Yet, the University lacks a comprehensive human capital strategy to guide that investment and ensure optimal performance of the Human Resources (HR) organizations. Furthermore, as noted earlier in this report, there is no one position within the University charged with the responsibility of developing overall human capital strategy, labor negotiation strategies and appropriate HR systems. The lack of strong leadership for HR functions has resulted in an outdated, rule-driven system of personnel management which is mostly reactive as opposed to proactive in its approach.

The working group reinforces the first recommendation in its report that a senior university administrator should be charged with the responsibility for developing a university-wide human capital strategic plan, including guidelines for overall HR and labor relations policies and practices as well as the creation of a University HR Council, consisting of university administration and campus HR managers. A new business model of shared or consolidated services is crucial. HR management at the individual department and unit levels can be inefficient and costly. More shared provision of services would allow the best practices to be generalized, standardized and shared. The new business model will have to include a means of funding shared services, most likely a charge to the units benefited by the services. The structure of the organization must be flexible enough to meet the needs of the customer and not create additional bureaucracy. The service should embody a customer focus and develop metrics for measuring the productivity of the HR organizations.

Opportunities for greater HR consolidation in units, e.g., policy guidance, training, purchases of IT systems, etc., exist. Whether the expertise is shared at a college or campus level should be determined by the needs of the organization. The goal is to provide better service to all units and to redirect staff and cost savings to other important activities. More details of the shared service center approach are provided later in the report.

The number of academic professionals (AP) at the University has doubled in approximately ten years, mostly on State funds. This trend can be attributed, at least in part, to changes in the work, in the way work is accomplished and skill sets needed for changing expectations and requirements. The contributions of academic professionals are important to many functions performed at the university. As a workforce they are flexible, self-directed, multi-disciplinary, and able to adapt to the changing needs of the University as noted in *A Report on the Status of Academic Professionals* by the Academic Professional Task Force at Urbana. Given the size of this group and the diversity of functions they perform, it is critical that the content, title, requisite qualifications and structure of academic professional positions be clearly articulated.

- **Recommendation 24**: That the University should immediately undertake a comprehensive review of all policies governing AP positions; including duties and responsibilities, the multiplicity of titles, career progression, opportunities for continuing professional development, notice provisions and grievance procedures. The review should include a comprehensive benchmarking with other institutions and the assistance of internal and external subject matter experts. The retention of a consultant with experience with higher education institutions may be advisable.

- **Recommendation 25**: That in the interest of determining the total compensation for all employees, a task force should be charged with reviewing current benefits and recommending any changes to those benefits. The University should take immediate steps to review the potential impacts of changes to the pension system for new employees on its ability to remain competitive as an employer.

Communications

Communications programs provide a broad range of services to connect with and inform the many and varied stakeholders of the University—prospective and current students and their parents; prospective and current faculty; our alumni and friends; funding agencies, including state and federal governments and the general public. The programs are managed by professional staffs that provide services such as strategic communications, copywriting, editing, event planning, graphic design, media relations, marketing consulting, speechwriting and Web site development and maintenance. Many of them also have responsibilities that stretch into alumni relations, fundraising and other functional areas.

Like a number of other administrative services, communication services are provided by a wide variety and large number of units throughout the University. The services are highly decentralized, although in the past few years there has been an increased level of coordination and resource sharing across the units. The impact of these efforts in controlling costs has been difficult to assess, however, due to the lack of a system for accounting costs by function and unit. It became apparent to the working group that an accurate accounting of the total costs of communication programs, including personnel and non-personnel expenses, is difficult at this time. Creating such an accounting system should be an immediate priority.

- **Recommendation 26**: That best practices be established across the institution for measuring or assessing the cost of specific communication programs and estimating the impact of those efforts. The implementation of this recommendation will allow each unit to more accurately track the resources it is using and the impact of those efforts. This will make it possible to determine where to invest scarce resources and how to adapt to a changing environment.

Despite the deficiency in current data collection methods, there are opportunities for reducing costs and improving services through greater coordination among units, creation of shared resources and streamlining duties and roles. A special effort needs to be undertaken by each unit to review the number, circulation and frequency of print publications. It is apparent to the group—and to many others at the University—that many printed pieces published by units are having limited impact. Greater control of print publications will reduce costs and also reduce the impact on the environment.

- **Recommendation 27**: That each campus create a pool of professional resources (graphic designers, photographers, writers, editors, web tools and image databases) that can be shared by individual units. This step will not only reduce costs but also allow participating units to receive higher-quality and more efficient service in all functional areas of communication.

- **Recommendation 28**: That a process be implemented to review all printed publications with the goal of significantly reducing the number of such publications and print runs within the next year.

- **Recommendation 29**: That the purchase of products and services be consolidated from external vendors by individual units to develop strategic contracts that yield better prices. As noted earlier, leveraging the University's scale as a purchaser will create greater competition among vendors and reduce costs for units.

- **Recommendation 30:** That new staff be reassigned, realigned or employed to comply with the requirements of the updated Illinois Freedom of Information Act.

The working group believes that potential savings of approximately $2 million annually can be achieved from these recommended actions within the next two to three years.

Facilities Management and Capital Programs

Physical facilities represent an important asset of the University, similar to an endowment portfolio or other financial assets. However, over the past decade, a number of committees and task forces have highlighted a significant and troubling backlog of deferred maintenance, leaving core assets of the University in a position of diminished value and usefulness. Certainly a part of this is a result of insufficient state funding for major deferred maintenance projects. But benchmark data comparing our resource/service levels for facilities maintenance to that of peer institutions also suggest that appropriate resources have not been devoted to ongoing maintenance of our physical assets.

- **Recommendation 31**: That steps need to be taken to stabilize funding for maintenance of University facilities and to redress the backlog of deferred maintenance. Some two decades ago, the University established a policy of an annual set-aside of funds for interior and exterior maintenance of "auxiliary" facilities (residence halls, student unions). As a first step the University should establish a similar policy for all University buildings. Further, the President should charge a University officer with the responsibility of working with the campuses to develop, implement and enforce such a policy.

Over the past three decades, the University has used various models for planning and managing new facilities, while the day-to-day maintenance of existing facilities has been sustained as a campus-based function.

- **Recommendation 32**: That the current organizational structure for construction and maintenance of facilities should be better aligned with clear responsibilities and minimal overlap through modification of the current Memorandum of Understanding (drafted in 1997) between campus-based facilities departments and the Office of Capital Programs. Areas for review should include all aspects of capital delivery, real estate services, and the management of the utilities program.

The working group also reviewed with University and campus officials opportunities to consolidate, streamline, or reorganize activities in facilities maintenance, capital programs and a variety of other services in order to improve effectiveness and gain efficiencies. In recent years, the campuses have periodically examined opportunities for reducing the cost of delivering selected service areas by changing their organizational configuration or outsourcing. These reviews have ranged from the examination of janitorial services to central stores. In general, the reviews provided potential avenues for enhancing efficiencies, many of which have or are being implemented. Based on these reviews, the working group recommends:

- **Recommendation 33**: That efforts to control costs for printing services and fleet maintenance services through downsizing or outsourcing be accelerated, given the commercial alternatives that are available. In addition, the campuses should adopt a program of benchmarking the cost of delivering ground maintenance services against the cost of outsourced services with similar or higher service quality. In making this recommendation the group is mindful that the optimal delivery model may be different at each campus because of differences in geographical location, size and available alternatives.

- **Recommendation 34**: That the campuses should consider a merger of units performing "like" functions to gain synergy and cost efficiencies, leading to significant savings for the campuses as well as for units within the campuses. As is often true in many large organizations, there are different units within the University that provide similar facility management and construction-related services. For example, separate units within the information technology groups at the two larger campuses provide construction services for telecommunication-related projects, in parallel to the work of the construction unit within the Facilities and Services group.

- **Recommendation 35**: That all retail activities—sale of merchandise or service to students, faculty, staff or visitors for personal use—be consolidated within the Auxiliary System; and specifically in the Urbana campus within the Illini Union. Several units at the Urbana campus are currently engaged in retail activities. Consolidation within the Auxiliary system will assure for full cost recovery through overhead assessments. The scope of this proposal would include but not be limited to course materials (textbooks, course packets, and classroom supplies), computer hardware, software and peripherals, photocopying, digital printing and print on demand, and insignia merchandise.

Improving Internal Business Processes and Seeking Regulatory Relief

Like all organizations, the University imposes controls over its business processes in order to mitigate potential risks that may arise from individual business transactions. The State and the federal government impose regulations with the same goal. All units of the University devote substantial human and financial resources to meeting internal controls, state, and federal regulatory mandates. The burden of regulatory compliance and potential for regulatory relief inevitably surface in any discussion of administrative costs.

It is important to recognize that both internal and external regulations arise from an identified risk situation and constitute an effort to mitigate risk. A failure to regulate and control how and who conducts certain types of business transactions could jeopardize the University's reputation and resources. That is, in certain instances the costs of compliance, though onerous, could pale in comparison to the costs of non-compliance.

However, changed circumstances can lead to the obsolescence of regulations and practices for implementing regulations can also become outdated. Interpretations of regulations should also be periodically reviewed. For these reasons, the working group reviewed existing internal and external

regulations governing business transactions to identify those that could be amended without increasing risks to the organization.

The group recommends seeking amendments to targeted internal and external regulations. Specifically, with regard to internal processes the group recommends:

- **Recommendation 36**: That *The General Rules* be amended to allow for the implementation of electronic reviews, signatures, and archiving of contracts; and reduce the layers of approvals required for low-risk, routine contracts.

  The University currently relies on a very manual and paper-driven process for the development and approval of contracts. There were over 10,700 contracts processed in fiscal year 2009 and that number keeps increasing each year. Once contract language is mutually agreed upon between the University and a third party, multiple paper copies of the contract are routed for final review, approval and signatures by appropriate administrative units including; Legal Counsel, Comptroller, Secretary of the Board of Trustees, and other administrative offices as required. *The General Rules* currently require written approval by Legal Counsel on all University contracts and retention of paper copies. An electronic system will help to reduce processing time for contracts, help archive and monitor contracts more effectively, and save paper.

- **Recommendation 37**: That a new electronic "disclosure portal" be implemented to capture conflict of interest and commitment disclosures and implement electronic signatures for conflict of commitment/interest reporting. The current paper process for collecting conflict of interest and commitment information has served the University well for over two decades. However, given the importance of these policies and increasing national attention to management of conflict issues in research, it is important to enhance the management, storage and analyses of the large volume of conflict of interest and commitment information collected annually.

- **Recommendation 38:** That in consideration of costs, time and other burdens, the President and Chancellors should seek to find an appropriate balance between compliance requirements and risk mitigation in enforcement activities across internal regulatory areas (e.g., auditing, legal).

- **Recommendation 39**: That the central administration and the campuses find ways to better align and optimize the resources of shared functions like accounting, budgeting and Decision Support. These are examples of institutional research functions or services where there are clear needs at both the campus and university level. There are reporting obligations and need for analysis to guide decision making. These efforts need to be better coordinated so that the needs are met at all levels of the organization. To the extent possible, the level that has the greatest need should control the resource. It is a goal throughout this exercise that duplicative services should not be created so the level that has the reduced need, which is still important to have met, should have access to the service on a shared basis.

- **Recommendation 40**: That the University work with the State to allow the University to encourage veterans to take the Federal GI benefits before the Illinois Veterans Grants so as to steward state resources and optimize the receipt of federal dollars.

- **Recommendation 41**: That internal process for projecting cost estimates, seeking approval for capital projects, contractor qualification evaluation and bonding and payment methods be streamlined; and seek amendments to the State of Illinois Qualified Based Selection Act (1991) to raise threshold for consultant selection process.

- **Recommendation 42**: That the University seek amendments to existing State policies regarding methods for debtor notification, movable inventory control limits, inventory disposal procedures, limits on write-off on uncollected claims, and electronic filing of Statements of Economic Interest.

Shared Service Centers

Administrative services at the University are currently delivered through a particular mix of centralized and decentralized service units. Historically, there has been a persistent tension between these two modes of operating, although each has its merits under specific circumstances and any point on this continuum may be ideal for a particular purpose or unit. What seems to be clear, however, is that decentralized service provision as the main operating model for the University needs to be challenged.

The perceived advantage of a decentralized service is the control that a unit has on how it will provide and receive services. In reality, often a single staff member does multiple tasks across a number of functions, i.e., purchasing, HR, business transactions, grants administration, etc. This results in inefficiencies, duplications and sub-optimal deployment of skills and resources. The provision of services in a centralized or consolidated way can provide higher levels of expertise and create economies of scale, but a disadvantage is the customer's lack of ownership of the service.

Many organizations have sought to take advantage of the best features of both approaches while improving responsiveness to constituencies served through shared service centers. A shared service model incorporates the following elements: a governance structure, a portfolio of services, cost tracking and charge-backs, utilization of service level agreements, increased levels of task expertise, and services delivered with a focus on customer satisfaction. A centralized or consolidated service unit could also be improved by taking on some of the features of a shared service even if a true "shared" service is not achieved.

Shared service centers have been implemented within the University and a few are already operating successfully (University Administration Employee Relations and Human Resources Office, the partnership between the UI Hospital and UIC Office of Human Resources and the School of Chemical Sciences). The industry estimate for cost savings is in the range of 20-30 percent over time. The working group believes these estimates are conservative but there are relevant examples throughout the University where savings of this magnitude (and more) have been realized. The College of Applied Health Sciences at Urbana has experienced a cost savings of at least 30 percent from the seven shared service centers currently operating within the College. The UI Hospital and UIC Office of Human

Resources estimate savings in fiscal year 2009 of approximately $1 million from the shared HR services agreement. The shared IT service center at the College of Liberal Arts and Sciences at Chicago is estimated to result in savings of approximately 50 percent by year two when it is fully implemented in fall 2011.

- **Recommendation 43**: That shared services should be considered as a cost-effective alternative to decentralization, consolidation or centralization of administrative services. A shared service is considered to be "centralization with benefits." All administrative processes should be examined to determine whether the organization would benefit from shared service.

The University should put in place an organizational change management team to serve as an ongoing resource for the identification, review and implementation of a shared or centralized service. Engagement of outside consultants may be needed for specific projects. Leaders of administrative units, in conjunction with the team, should be encouraged to determine which service model could improve services and/or reduce costs in their respective units. Shared services could be proposed where disciplines are similar or related and physical proximity to the end users is close. For whatever service model is chosen, a more adaptive and responsive governance approach for administrative support services is critical.

Other Administrative Cost Reduction Programs

As part of the effort to reduce administrative overhead, the University initiated a program in 2009 to reduce personnel and non-personnel cost of university administrative officers reporting to the President, Chancellors and Vice Presidents. To that end, initiatives resulting in recurring budget reductions of $15 million between fiscal year 2010 and fiscal year 2012 were identified. A number of those initiatives have been integrated with the broader initiatives outlined in this report. However, reductions ranging from $7 to $8 million can be achieved in the next two years beyond the reductions identified in various sections of this report.

The University uses a number of off-campus sites to perform activities critical to its mission (such as operate clinics, extension services, research projects). The working group helped coordinate a review of these sites to determine if the activity can be performed equally effectively in a smaller space, whether the site can be consolidated with another off-campus site leased by the University, or whether the activity could be relocated to a campus. The review resulted in the relocation or renegotiation of leases for a number of these sites that will yield cost savings of approximately $500,000 annually going forward. Further savings are likely to be gained in the future.

Conclusions

As a result of our deliberations over the past five months, we believe that the University is at a watershed point in its history that mandates a new vision for the way in which it should deliver administrative services and establish its business processes going forward. To that end, we offer the following perspectives and suggested guiding principles for consideration:

- Efforts to gain efficiencies in the future will depend on whether the University can coordinate administrative operations across the institution in an effective manner. While major differences exist among the campuses and units regarding teaching, research, and student programs; such distinctions are less obvious when administrative functions and services are examined. To take advantage of scale and to ensure uniformity in services and business platforms in areas like administrative information systems, telecommunications and procurement, it will be optimal to operate to the extent possible like a single university with a high level of collaboration and consultation among all three campuses to implement the most efficient business models possible.

- As a general rule, the movement toward a "shared service" model for administrative services at the college, campus and university administrative levels offers a path to realizing improvements in service while simultaneously reducing costs. The focus on customer service will have to be kept central to these endeavors to serve our academic units at an optimum level.

- Management information systems are an important tool in controlling costs and improving performance that the University is not utilizing effectively. Our experiences in trying to discern expenditures in the areas of information technology and communication are illustrative in this respect. The various working groups had to implement their own processes to estimate these costs (and they remain estimates only). The costs of delivering different administrative services by the University, individual campuses, colleges, departments and units should be reported and disseminated periodically. While the Banner financial system has the capability of recording expenditures at a very fine level of detail, we have not taken advantage of it to organize our expenditures in ways that would provide useful information. A coding system must be developed that will allow us to better monitor expenditures for IT, communications, and other key services.

- A significant portion of the cost of doing business at the University is the result of regulatory requirements that stem from various federal and state laws, policies, and regulations that in some cases run contrary to good business practices, even when elements of risk or the need for compliance is considered. Given the financial pressures at public universities around the country, several states have offered to relieve universities of state regulations, providing management flexibility to the governing boards of those institutions. We believe that similar efforts should be pursued in Illinois, recognizing that the University will always be required to provide full transparency and best of class service to the students and taxpayers in this State. Make necessary changes to *The General Rules* to adapt internal regulations to changing technology and business practices as suggested in the report (viz., electronic reviews,

signatures, and archiving of contracts; and reduce the layers of approvals required for low-risk, routine contracts).

- We need to consider our physical facilities as important assets that have the same effect on the university's balance sheet as its endowment. While we appear to pay considerable attention to investing our financial assets prudently, the track record on stewardship of our facilities is not stellar. To ensure that administrators deal appropriately with our physical plants, the working group urges the President and the Board to direct resources in a disciplined way such that investments in our buildings are safeguarded over time.

- While 70 percent of the University's budget is devoted to personnel, the examination of the human resource functions both at the campuses and university administration indicates a need to provide a stronger focal point for the programs and policies that affect all classes of employees at the institution. A greater degree of attention should be given to this area as the University begins to transform itself with a concomitant effect on staff levels, salaries, benefits, and other conditions of employment.

Organizations must continuously strive to improve the effectiveness and efficiency of administrative services. Our report provides recommendations for specific changes that can be implemented in the near term. The recommendations are based on the group's review and analyses of administrative systems over the past five months with input from a variety of constituencies and benchmarking with other universities. However, based on our own experience and those reported to us by others at the University—and supported by substantial research—we recognize that implementing a disciplined process to capture those opportunities will require sustained effort that has to continue well beyond the life of this work group. Such an ongoing effort must have visible support from the institution's senior leadership and the University community at large. As the next step, the working group recommends that the President and Chancellors, in consultation with other stakeholders, establish a process for selecting the recommendations to be implemented and assign an individual or team with clear accountability and resources to make the changes happen within a reasonable time. Working groups should be established for implementing recommendations in specific functional areas with assistance from internal and external experts and with broad consultation. Periodic progress reports should be made to the University community.

Finally, this effort should not be considered a "once and done" project; to ensure greater stewardship, a continuous improvement program needs to be sustained by the University. While we need to continue to innovate, we must also acknowledge that in order to do something new we may have to give up something else. The strategic thrust to improve quality, while containing costs, will allow the University to enhance its excellence even in a resource-constrained environment.

Summary of Cost Reductions*	$ in 000's
Strategic Procurement	$22,000
Information Technology	$18,000
General Administrative Reductions	$7,500
Development/University of Illinois Foundation	$4,500
Reorganization of Executive Level Positions	$3,000
Communications and Publications	$2,000
Off-campus space	$500
University of Illinois Alumni Association	$500
Total reductions in annual expenses achieved over 2-3 years	**$58,000**

- These cost reductions should only be interpreted as approximate savings targets. The savings are anticipated over a period of years and will be realized at multiple levels of the organization. Savings will be achieved in actual expense reductions and/or avoidance of future costs. The level of savings will vary based on the number of recommendations implemented. Savings from the adoption of a shared service model are not included in the estimates shown above; however, from experience it is realistic to expect that savings in the range of thirty percent in the costs of providing a service can be realized through shared service centers.

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Presentations also provided by:

Huron Consulting Group (December 8, 2009)

UIAA (ARR meeting January 28, 2010)
Loren Taylor and other Alumni Association administrators

UIF (ARR meeting, January 12, 2010)
Sid Micek, Jim Schroeder, Vicki Megginson, Penny Hunt, Ed Ewald, Brad Hatfield,

Facilities (ARR meeting, March 10, 2010)
Michael B. Bass
John G. Dempsey
Mark Donovan

Auxiliaries (ARR meeting, March 10, 2010)
Michael DeLorenzo
Michael Landek

Overview (Budget, Performance Indicators)
W. Randall Kangas (ARR meeting, December 7, 2009)

Bain Report Analysis for University of Illinois
Douglas E. Beckmann (ARR meeting, December 7, 2009)

Procurement
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Michael H. Hites (ARR Meeting, December 8, 2009)

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Reports and Presentations utilized by ARR Working Group and Subcommittees

Area	Title/Description	Date
Administrative Review	Administrative Review 2003-2004 (multiple reports, presentations and documents)	2003-2004
Alumni Relations	UIAA Service Agreement	July 1, 2009
	UIAA Strategic Plan Pre-Final	2001
	UIAA Presentation to ARR	Jan. 28, 2009
Commodities	Commodities Purchases Review-Accenture	Feb. 27, 2004
	Procurement Org Structure and Approaches Used by Other Universities-Accenture	Mar. 19, 2004
	Procurement Review-Annual FY09	
Efficiency/ Effectiveness	Reorganizing Not Reinventing: University of Massachusetts at Amherst	Mar. 13, 2009
	Bain Report: University of North Carolina at Chapel Hill Cost Diagnostic: Final Report and Chancellor's Narrative	July 2009
	Resource Use Advisory Board: UIUC	Spring 2008
	Results of Review of Administrative Services and Support: Campus Academic Units: FY03-FY04	Oct. 21, 2003
	Cornell University: Strategic Planning-Preserving & Enhancing the Core	Jan. 2009
Facilities/ Capital Programs	Coopers & Lybrand Consulting: The University of Illinois Capital Construction Process Review	July 1997
Fundraising/ Development	Analysis of the Cost of Fundraising and Development Activities FY2005-FY2008	June 2, 2009
	UIF Strategic Plan	Jan 06, 2006
	UIF Service Agreement	July 1, 2009
	Big Ten University & Foundation Endowments: NACUBO Endowment Study	FY 2009 FY 2008
Energy	Big Ten Environmental Stewardship Meeting Report	Nov. 11, 2009
	Energy Task Force Final Report to BOT	Oct. 21, 2009
ERP	Support Services Strategy (S3) Executive Summary and Report	1999
HR	HR Reorganization Decentralization Outline	Nov. 16, 2007
	A Report on the Status of Academic Professionals: Academic Professional Task Force-Urbana	Feb. 25, 2008
	Sick Leave and Vacation Expenditures	2000-2009
	Staffing Trends	1997-2009
Institutional Support Costs	Pappas Report: Institutional Support Costs	June 2004
IT	AITS Annual Progress: Michael Hites	FY09
	ATS Metrics	FY09
	AITS Strategic Plan	March 2009
	Decision Support	FY09
	IT Org Assessment Report: Pappas	April 02, 2007