

Yale University

Business Operations

Business Managers Meeting Current & Proposed Business Manager Meeting Structure

“Supporting Yale Together”

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West Campus
November 15, 2007



Business Operations Priority 1.2.a

- Put basic building blocks in place for the Business Operations organization
 - 1.2 Provide clear meeting structure to establish communications
 - a. Business manager meeting defined and in place by January
 - b. List of business managers and Business Operations structure automated and accessible by January
 - c. Administrative calendar created and accessible by December

Why We Meet



Are You Lonely?

Don't like working on your own?

Have trouble making decisions?

THEN CALL A MEETING!

You can...

SEE people

DRAW flowcharts

FEEL important

IMPRESS your colleagues

All on Company Time!



MEETINGS

The practical alternative to work.



Why We Meet

- We are all dealing with change
- We work in a complex organization
- Process Owners want to have user input
- Business Managers want to know what is coming



Current Meetings

- Distributed User Committee (DUCs)
- Business Operations and Planning (BOP)
- Business Managers Monthly Meeting
- Large Division Administrators Meeting (currently dormant)
- School of Medicine Groups
 - Business Managers' Forum
 - Office Operations
 - Research Administrators Group (RAG)
- Others...



Current Meeting Structures Provide:

- Information and documentation
- Opportunity for direct exchange with process owners
- Opportunity to interact with each other



Challenges

- It is not clear who should attend each meeting
- Inconsistent schedules and synchronization
 - Pockets of Structure
 - Communications “Blind Spots”
- Business managers and process owners are uncertain about where and when to share or obtain information
- Agenda items and dissemination of information are not well coordinated

Goals for New Structure

- Efficient communication between business managers and process owners
- Clear understanding of:
 - the purpose of each meeting
 - who should attend each meeting
- An understandable and transparent responsibility structure
- Excellent and timely decisions
- Resolution of conflicts between the “needs” and the “wants” of the process owners and business managers
- Broad-based understanding of issues by all process owners and business managers
- Support for rational rollouts of new initiatives



Proposed Approach

- Preserve what is most useful and effective in the existing structure
- Rationalize, clarify and improve
- We need your reaction and feedback
 - A few minutes today
 - Follow-up discussion at your monthly meetings
- Implement new structure in January

Support the Missions of Yale Through...

Business Operations Leadership Team (BOLT)

S. Murphy, AVP Business Operations

FAS & Provost

J. Grant

Science &
Technology

D. Gingerella

Other
Academic &
Support Units
J. Beecher

Officers
B. Rebesch

Law School
M. Templeton

School of
Management
D. Palmeri

School of
Medicine
C. Capezzone

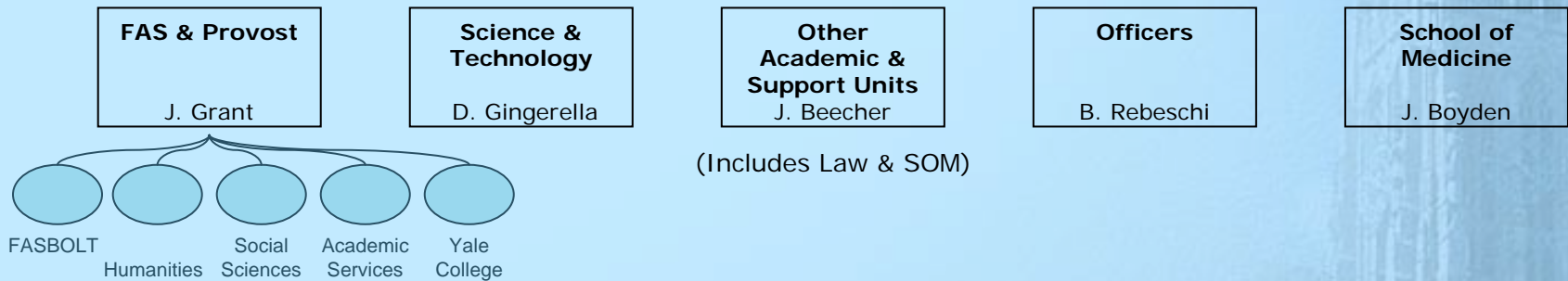
- Meets Weekly

“...first and foremost about providing and ensuring the quality of support to faculty/students/staff...”



Monthly Meetings... “2M”

Business Operations Monthly Meetings (2M)



- All Schools/Units/Departments represented
- Monthly scheduled meetings
- Coordinated agendas
- Each chaired by, or formally connected to, the BOLT
- Disseminate information to business managers
- Share best practices
- Develop mutual support systems
- Provide training opportunity



Today's Meeting – “BOSAM”

Business Operations Semi-Annual Meeting (BOSAM)



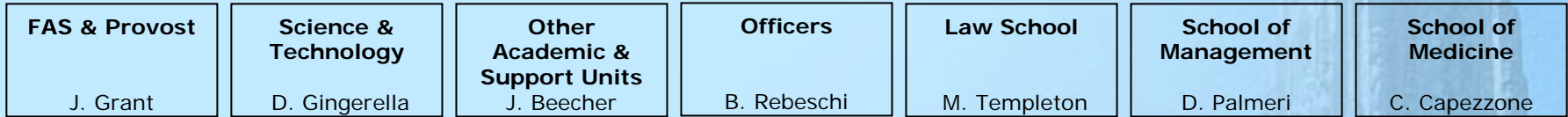
- Meet Semi-Annually – convened by Steve Murphy
- Provide direct access to University leaders
- Disseminate important, timely and relevant information
- Provide important and relevant training
- Showcase best practices of members of the group
- Seek feedback on key issues
- Provide an opportunity for networking and social interaction



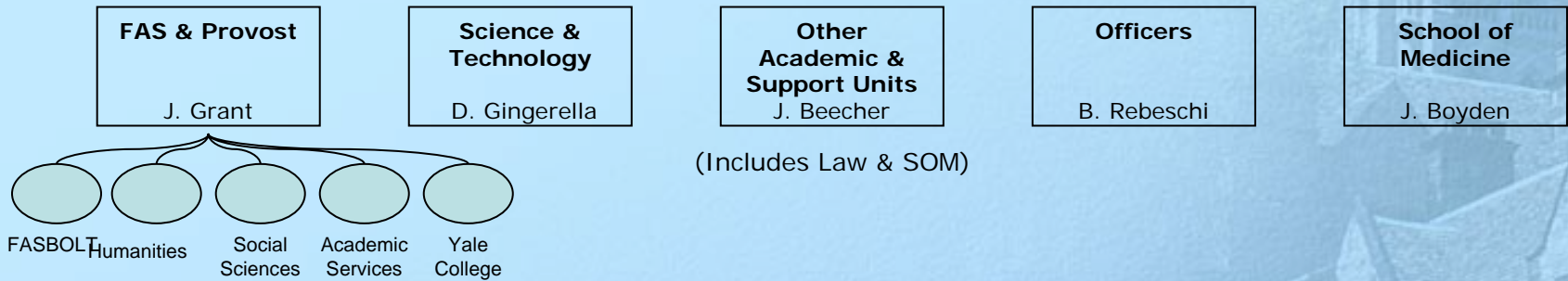
Support the Missions of Yale Through...

Business Operations Leadership Team (BOLT)

S. Murphy, AVP Business Operations



Business Operations Monthly Meetings (2M)



Business Operations Semi-Annual Meeting (BOSAM)



DUC: “The Next Generation”

Business Operations Advisory Committee (BOAC)



- Nine members – Representative of the University
- Chaired by BOLT member
- Nominated annually by BOLT appointed by AVP
- Meet semi-monthly
- Replaces DUC
- Will have a *key* role in Business Operations
- Review proposals
- Provide advice

BOP...The Next Generation

Business Operations Special Interest/Educational Groups (BOSIG)

Business Operations Community Meeting

YSM Office
Operations

Research
Administrators
Group

YSM Forum

Others...
TBD

- Business Operations Community Meeting
 - Replaces and preserves BOP
 - Chaired by a BOLT member
 - Monthly schedule
 - Assistant/Associate Business Managers
 - Announcements sent to Business Managers
 - Parallels, and coordinates with, the 2M meetings
- Research Administrators Group expanded to entire University
- Existing internal committees remain
- Other groups convened as needs dictate

Support the Missions of Yale Through...

Business Operations Leadership Team (BOLT)

Business Operations Monthly Meetings (2M)

Business Operations Advisory Committee (BOAC)

Business Operations Special Interest/Educational Groups (BOSIG)

Business Operations Semi-Annual Meeting (BOSAM)

- Provides:
 - Communications “road map” for business managers and process owners
 - Coordination through BOLT and Advisory Committee
 - Flexibility through SIG
 - Opportunities for broad interaction
- Within one month all business managers can hear or share new information

Your Feedback

- Please review this structure at your next monthly meeting (2M)
- Let us know your concerns and suggestions
- A few questions with the last group:
 - Should we have combined meetings?
 - Is the interaction more important than the location?
 - Should there be standing SIG's – if so, which, etc.?
- E-Mail your comments
- Contact any member of the BOLT



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