

To: All Business Managers (Lead Department Administrators)
Deans, Directors, and Chairs

From: Stephen Murphy, Associate Vice President for Business Operations
Cynthia Walker, Deputy Dean for Finance and Administration, School of Medicine

Dear Colleagues:

We are writing to inform you about a new initiative the two of us are sponsoring, "Defining the role of business managers at Yale," which directly involves you and colleagues in business offices throughout the University.

The primary goal of this initiative is to clarify the roles and responsibilities of the business manager (lead department administrator) position so that these key leadership positions are focused on doing the right work, in the right way, to deliver the best possible support for the mission of the University. In conversations over the past year with many of you, we have come to appreciate the high degree of variation and ambiguity that exists in the role of business managers. This has resulted in both inconsistent levels of support received by academic schools, departments, and programs and also inconsistent opportunities for career and professional development for business managers and their staff. By clarifying the roles and responsibilities of these important leadership positions, we will be positioned to provide better and more consistent support for schools and departments. We will also be able to provide better support for the growth and development of the women and men who serve in these positions and who are among our most dedicated and valued administrative leaders on campus.

The specific deliverables of this initiative, which is underway and expected to conclude in June 2009, include the following:

- description of the key roles, responsibilities, and expected outcomes for the business manager (lead department administrator) position;
- classification structure and career ladder describing the levels, job summaries, and job titles for the business manager job family and related job families (research administrator, clinical administrator, etc.) as needed;
- definition of skills and behaviors associated with expected performance at each level;
- list of business manager positions slotted by title and level, and a process for working with business managers and Deans, Directors, and Chairs to understand and effect the clarified roles and expectations of the business manager position;
- process for incorporating the clarified expectations into the Fiscal 2010 performance management (FOCUS) process;
- process for maintaining the new structure; and
- communication of the roles, responsibilities, skills, and behaviors to key stakeholders.

To accomplish these objectives we will need input and engagement from many of you, and the two of us and the project team will be contacting many of you in the coming months to solicit input. We welcome any thoughts you might have throughout the project regarding this important topic.

We have established a core project team which is being co-led by Jack Beecher, Senior Director of Business Operations for Other Academic and Support Units, and Carrie Capezzone, Assistant Dean of Finance for the School of Medicine. Jack and Carrie will be visiting each of the Business Operations Monthly Meetings (2M) to provide business managers with a more detailed overview of the project and to answer questions. We are committed to providing regular project updates in the monthly meetings and also on the Business Operations website (www.yale.edu/fa/businessops).

The business manager (lead department administrator) position is, and will continue to be, a key leadership position that ensures schools, departments, and programs receive high quality, efficient, and compliant financial and administrative support - both strategic and operational. By providing their respective units with high quality support they make it easier for faculty, researchers, clinicians, and students to focus on their vital pursuit of advancing, disseminating, and preserving knowledge "to strengthen our nation and improve, as best we can, the human condition around the globe."

This project is an essential building block in the overall transformation of Finance and Administration underway at Yale and will help advance us toward our goal of providing the finest services for the finest University in the world.

If you have any immediate questions or comments, please contact either of us, Jack, Carrie, or any member of the Business Operations Leadership Team.

Best Regards.

cc:

Shauna King, Vice President, Finance

Michael Peel, Vice President-designate, Human Resources & Administration

Business Operations Leadership Team

- Julie Grant, Senior Director of Business Operations, FAS & Provost's Office
- David Gingerella, Senior Director of Business Operations, Science & Technology
- Jack Beecher, Senior Director of Business Operations, Other Academic & Support Units
- Brian Rebesch, Senior Director of Business Operations, Officer Units
- Carrie Capezzone, Assistant Dean of Finance, School of Medicine
- Mark Templeton, Associate Dean Finance & Administration, Law School
- Diane Palmeri, Associate Dean, Finance & Administration, School of Management