University Policy Update

GMUN Membership Meeting
5/11/06
Outline

• Policy drivers
• Overview of University Policy Improvement Project
• Recent policy changes
• Policies under review
Drivers for Policy Changes

- Alignment and consistency with University Board policies
- Strategic Positioning
- Balance controls against potential risks
- Opportunity to reduce administrative effort
- Implementation of new systems
- User feedback on existing policies and procedures
University Policy Improvement
Project Overview

• University Policy framework needs to be:
  – Streamlined
  – Strategic
  – Sustainable
  – Aligned to better support a culture of compliance and organizational effectiveness
Guiding Principles

• University policies will:
  - Reflect University values, and support mission.
  - Be consistent with Board policies, laws, regulations.
  - Align policy ownership, authority, and oversight with operational responsibility.
  - Be user-friendly - clear, concise, accessible.
  - Allow for an appropriate level of manager discretion.
Areas for Review & Improvement

- Policy Process
  - Who decides a policy is needed?
  - How are policies created, modified, deleted?

- Policy Structure
  - Oversight of policy framework
  - Policy owner review schedule
  - Compliance

- Policy Content
  - Scope, format, tone, style
  - Delegation
  - Laws, rules, regulations
Expected Benefits

- More user-friendly and accessible policies
- Save employees time
- Help eliminate unnecessary administrative burden and increase productivity
- Align policy ownership, oversight, and authority
- Increase employee empowerment
- Increase compliance and reduce institutional risk
The Timeline

- **Phase one (define, measure, analyze, and improve)**
  - March/April - Broad consultation with critical stakeholders. Develop ‘as-is’ map. Collect data.
  - April/May - preliminary framework recommendations
  - May/June - Discuss and refine recommendations
  - July/August - Present recommendations

- **Phase two (control)**
  - September - launch comprehensive review of University policies
Recent Policy Revisions

• Tracking frequent flyer miles
  – Responsibility for tracking of miles moved from admin staff to the traveler
  – Clearer language

• Travel - meal expenses
  – Allows traveler to claim federal per diem for meals rather than actual costs
  – Flexibility to accommodate health, religious, and business needs during conferences
Policies Under Review

- Cell phone and PDA expenses
  - Considerable administrative effort and inconsistencies around reimbursement process
  - Compared U practice to other universities
  - Analyzed current costs and methods
  - Proposed Policy:
    - Sets criteria for who is eligible
    - Provides supplemental payroll augment for qualified individuals
    - Separate fixed amounts for cell phones and PDAs (e.g., Blackberry)
    - Allows for departmental mobile devices (e.g., police, shared cell phones for on-call employees), but stricter limits
    - Reimbursements still allowed for employees that incur occasional, business-related cell-phone expenses
Policies Under Review

• Hotel per diem
  - Sampled current spending patterns
  - Compared U to other universities
  - After analyzing data, determined there are isolated areas where more expensive lodging choices were being made – not wide-spread

• Proposal:
  - Will insert guidelines to assist departments in determining the ‘reasonableness’ of a hotel expense
  - Guidelines based on “GSA rates plus”
Policy Under Review

Purchasing thresholds for goods, standard services, & professional services

• Questions to answer:
  – Does our current bid threshold policy provide the appropriate balance of control vs. efficiency?
  – Is a change needed?

• Progress to date
  – Reviewed 2005 RFPs
  – Contacted peer institutions for comparison
  – Assessed customer interest
  – Planning on recommendation(s) by June