



# Opportunity Assessment Report

December 11, 2013



***DRAFT – For Discussion Purposes Only***

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## **Executive Summary**

**Summary of Opportunities**

**Opportunity Charters**

**The Path to Change**

**Appendix**

**The Bowling Green State University (BGSU) community has collectively made a significant effort to streamline over the past five years.**

- In response to shrinking enrollment, the University has been aggressively pursuing new sources of revenue;
- BGSU has made progress in reducing operating costs. Most recently, the Efficiency Task Force identified a number of opportunities for operational efficiencies, many of which the University has already begun implementing.

**BGSU recognizes that there is still an urgent need to create a more sustainable and affordable university.**

- In her introduction of this project, President Mazey presented the need to move to a more sustainable model due to an anticipated budget shortfall of \$3-\$10 million in the next 2-3 years.
- This shortfall is largely due to changes in state funding, retention, and enrollment.
- Due to a rise in student debt, always raising tuition is not a sustainable approach for covering these costs.
- The University understands the challenge. The need for improvement has been echoed as a consistent theme across project interviews with 50+ University leaders, academic leadership, administrative staff, classified staff, and students.

**The objective of the Opportunity Assessment project was to develop a plan for the University's consideration that can lead to efficiencies, creating large-scale cost reductions without jeopardizing the core mission of education.**

Accenture was tasked with:

- Evaluating the current state of the University's operating structure;
- Identifying a bold and broad range of measurable, attainable, realistic and, above all, mission-supporting opportunities that BGSU can consider to streamline operations in both the short and long term.

**This report identifies 22 improvement opportunities for University consideration. Broadly speaking, these opportunities identify specific areas for BGSU to consider, where it could:**

- 1 Provide more seamless and tailored services and programs to a broader range of students;
- 2 Adjust aspects of organization and operations to be more in line with peer universities;
- 3 Institute more efficient and effective administrative and operational processes while improving service;
- 4 Acquire and employ data more effectively in decision making.

**If BGSU chose to implement all of the 22 opportunities in the roadmap provided, they could realize an estimated ≈\$50-90M in net benefit and ≈1,500-3,000 new students over five years. Examples of estimated benefits include:**

- 1 ≈\$10-17 million in annual net benefit by the end of FY 2016/17 to help fill the budget shortfall;
- 2 An additional ≈\$9-14 million in net benefit by the end of FY 2018/19 to support mission-driving activities;
- 3 ≈600-1200 additional students by FY 2018/19 as well as improved retention/graduation rates;
- 4 Improved University relationship with and **service to students and alumni**.

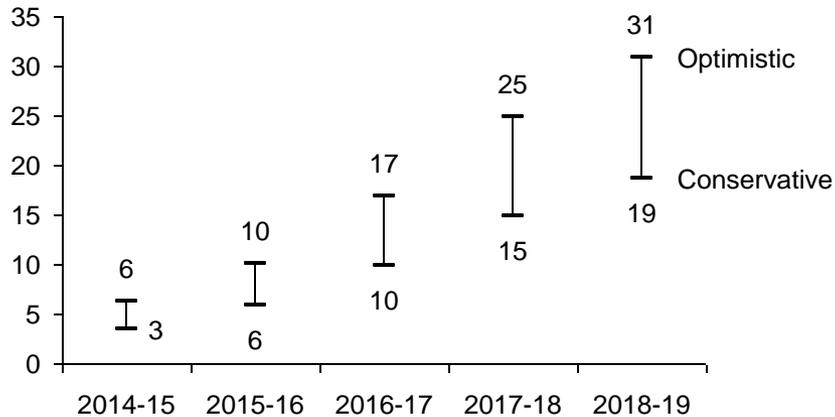
**Successfully executing on these opportunities would require the dedication of up to 12 BGSU full time equivalent (FTE) resources and investment of ≈\$9-13M over 5 years.**

- Time from BGSU FTEs is expected to be heaviest in the first and second year;
- Investment in external implementation resources is critical in several key areas where BGSU may lack internal expertise.

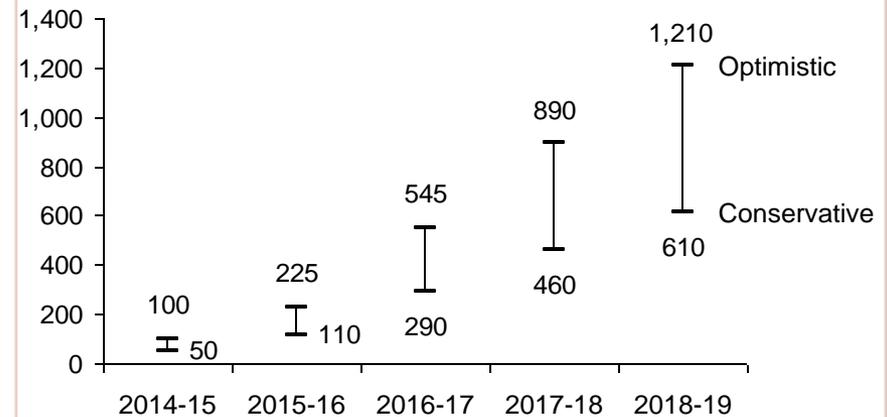
# Anticipated Benefit from Opportunities

**The 22 opportunities identified are estimated to deliver between ≈\$53-90M in net benefit and ≈ 1,500-3,000 new students over five years. Executing on these opportunities would require the dedication of up to 12 BGSU FTEs and investment of ≈\$9-13M.**

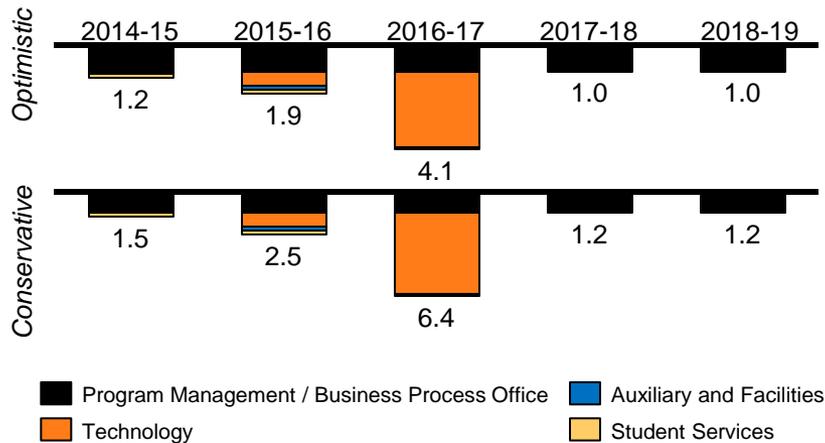
**Annual Net Operating Benefit, \$M**



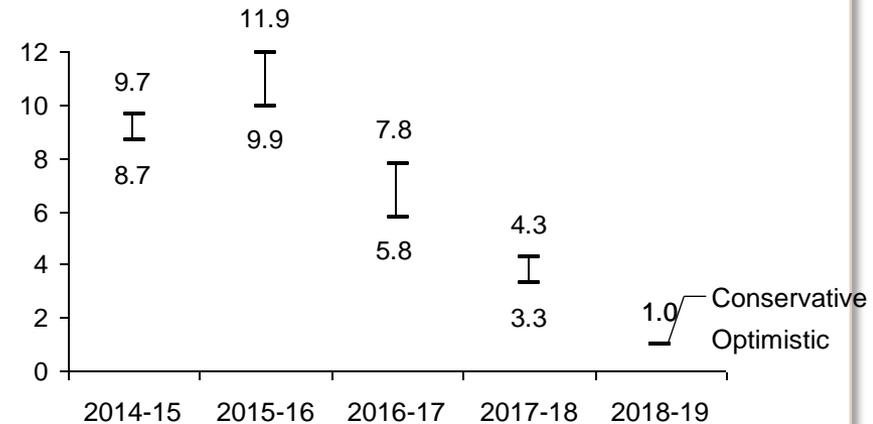
**Annual Enrollment Growth, Student FTE**



**Annual Investment Required, \$M**



**BGSU Project Resources, FTE Effort**



***Achieving identified opportunities will require significant devotion of BGSU resources, investment in external resources and infrastructure, and a dedicated project management team to manage the overall initiative.***

- **Internal Resource Allocation:**

- Implementing all opportunities would require the effort of up to 12 FTE existing BGSU staff, primarily in the first two years. Significant attention from University leadership would also be required to guide decision making and confirm progress is being made.

- **Critical Investment in Project and Process Management:**

- Projects of the scale and timeline that BGSU seeks to undertake require dedicated central management to be successful. The benefits identified assume a dedicated team that will coordinate across all 22 opportunities, manage dependencies, and track the benefits accrued.
- Process improvement is a key component for about 1/3<sup>rd</sup> of the opportunities identified. An external, cross-program team can help BGSU manage the process improvement exercises and also take the next step to realize the identified savings, something the University has struggled with in the past.

- **Investment in External Resources:**

- Certain opportunities require expertise that does not exist on the BGSU campus today. Capturing the identified technology and energy opportunities would require outside support pertaining to systems integration and energy conservation measures.

***Program management (Working Groups) and governance (Steering Committee) should be formed within the first mobilization phase, to ensure all projects are coordinated and that stakeholder input is fully integrated into the process from the beginning.***

## Program Management (Working Groups)

## Successful Implementation

## Program Governance (Steering Committee)

### Purpose:

- Ensures all projects are executed on time and with adequate resources, to **achieve the program's objectives and benefits**

### Functions:

- Provides centralized, coordinated **execution management** of all projects
- Manages delivery, performance, resource allocation, issues, and value realization

### Benefits:

- Enables all projects to be completed in a **timely** manner, **within budget**, **achieving the full value** of the opportunity **without sacrificing quality**

**Meets:** Weekly with project managers,  
Monthly with Steering Committee

### Purpose:

- Program governance ensures the input and **expertise of all impacted stakeholders is integrated** into the decision-making process

### Functions:

- Provides strategic **oversight and direction**, prioritizes opportunities, monitors performance, and manages scope

### Benefits:

- Ensures the program's **direction, scope, and priorities are clear** and **communication** between stakeholders and the program remains strong

**Meets:** Monthly, or as needed

***The next step for the University community is to review and provide commentary on this report in detail from December 2013 – January 2014, after which the University will begin to decide on which opportunities to implement and in which order.***

October	November	December	January	Beyond
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## Accenture Project and Analysis

◆ Dec 11<sup>th</sup> - Report is presented and posted

Accenture:

- Evaluated the current state of BGSU's operating structure
- Identified a broad range of measurable, attainable, realistic and mission-supporting opportunities for BGSU consideration

## Campus Review

- Campus to review report and submit comments per dedicated email box
- President's Cabinet engages in dialogue with key stakeholders:
  - Faculty Senate
  - Dean's Council
  - Administrative/Classified Staff Councils
  - Student Govt.

## Mobilization

- Set up Steering Committee and Working Groups
- Plan project timeline
- Obtain board approval, as required

## Implementation

- Implement initiatives according to project timeline

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**Appendix**

## Direct Benefit vs. Indirect Benefit

- **Direct Benefit Opportunities** have a measurable financial benefit that is unambiguously attributed to the initiative (e.g., Data Center outsourcing to Expedient means an annual operating cost reduction for ITS)
- **Indirect Benefit Opportunities** are likely to result in improved operational metrics that should, in turn, have a positive financial impact (e.g., improving student advising should result in a better graduation rate, in turn resulting in increased student revenue and SSI)

## Short Term vs. Long Term

- **Short Term Opportunities** have a direct, measurable financial benefit that is realized by year 3 that can and work to fill the budget deficit
- **Long Term Opportunities** have a direct or indirect impact that is realized starting after 3 years. The benefit is used to further the BGSU mission

The list of opportunities identified in the final report is meant to provide a directional indication of where benefit for BGSU could lie and an order of magnitude for that benefit. (e.g., \$50K, \$500K, or \$5M?)

*Our analysis uncovered 22 opportunities organized around six key areas.*

## Purpose of the Opportunities

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- 1 Organization, Employees & Benefits**

Rectify differences in management overhead, benefits, process efficiency, and general education offerings for BGSU compared to peers.
- 2 Student & Student Services**

Create an end-to-end student experience that most efficiently and effectively serves and attracts both traditional and non-traditional students.
- 3 Core Admin**  
*(HR, IT, Finance, Purchasing)*

Improve the efficiency of core administrative function delivery, enabled by standardized technology, processes, and policies.
- 4 Research & Advancement**

Effectively employ human and data resources to attract a greater volume of external donations and funding to the University.
- 5 Auxiliary Operations & Facilities**

Effectively provide quality operational and auxiliary services to the University to support the educational mission.
- 6 Education Platform**

Expand upon educational delivery platforms, partnerships and high-focus programs to bring more students from application to graduation to career.

**Opportunities in this section rectify differences in management overhead, benefits, process efficiency, and general education offerings for BGSU compared to peers.**

<p><b>A</b> <b>Annual Benefit:</b> By Year 3 \$1.48-2.15M By Year 5 \$2.52-3.24M</p>	<p style="text-align: center;"><b>Improve Span of Control</b></p> <ul style="list-style-type: none"> <li>• Increase average span of control, which refers to the ratio of supervisors to direct reports, across BGSU to meet the higher education benchmark of 1:6, reallocating supervisory time to mission focus work and driving reduced supervisory layers and increased employee engagement</li> <li>• Reorganize small departments where benchmark cannot be reached given current size</li> </ul>	<p><b>Feasibility Rating:</b> </p>
<p><b>B</b> <b>Annual Benefit:</b> By Year 3 \$260-680K</p>	<p style="text-align: center;"><b>Improve Sustainability of Tuition Fee Waiver Policy</b></p> <ul style="list-style-type: none"> <li>• Make tuition fee waivers more sustainable by updating eligibility requirements, thus producing significant benefits while:             <ul style="list-style-type: none"> <li>- Remaining in line with offerings of peer universities</li> <li>- Having little to no impact on the vast majority of employees</li> </ul> </li> </ul>	<p><b>Feasibility Rating:</b> </p>
<p><b>C</b> <b>Annual Benefit:</b> By Year 3 \$.28-.64M By Year 5 \$.75-1.51M</p>	<p style="text-align: center;"><b>Redesign Non-Core Business Processes</b></p> <ul style="list-style-type: none"> <li>• Analyze and improve administrative and operational processes across the University, targeting process efficiencies of 20-40%, driving increased employee and end-user satisfaction and establishing a cultural focus on continuous improvement</li> </ul>	<p><b>Feasibility Rating:</b> </p>
<p><b>D</b> <b>Annual Benefit:</b> By Year 3 \$1.45-2.68M</p>	<p style="text-align: center;"><b>Rationalize and Review General Education Offerings</b></p> <ul style="list-style-type: none"> <li>• Review general education offerings with consistently low enrollment to ensure course offerings are focused on student interests and define clear pathways for students to complete a degree in a timely way</li> <li>• Institute a minimum enrollment policy of 20-25 students for general education lecture courses</li> </ul>	<p><b>Feasibility Rating:</b> </p>

**Create an end-to-end student experience that most efficiently and effectively serves and attracts both traditional and non-traditional students.**

<p><b>A Annual Benefit:</b> By Year 3 \$129-150K By Year 5 \$258-300K</p>	<p style="text-align: center;"><b>Create Co-located Student Services</b></p> <ul style="list-style-type: none"> <li>• Launch co-located student services that allow students to easily navigate Registrar, Admissions, Financial Aid, Bursar, and Advising processes</li> <li>• This approach increases student satisfaction by providing a single point of contact for students while retaining deep functional expertise</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>
<p><b>B Annual Benefit:</b> By Year 3 \$0.69-.88M By Year 5 \$1.33-1.97M</p>	<p style="text-align: center;"><b>Promote Collaboration in Internship and Job Placement</b></p> <ul style="list-style-type: none"> <li>• Require departments to integrate career experiences to curricula as applicable to specific courses of study</li> <li>• Promote collaboration among internship, co-op, and career activities to improve student satisfaction, grow student participation in internships/co-ops, increase job placement for graduates, and gain administrative efficiencies</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>
<p><b>C Annual Benefit:</b> By Year 3 \$0.89-1.41M By Year 5 \$2.18 -3.37M</p>	<p style="text-align: center;"><b>Tailor Programs to Nontraditional Students' Needs</b></p> <ul style="list-style-type: none"> <li>• Create tailored student services programming to better support the needs of nontraditional students</li> <li>• Increase flexibility of academic offerings with evening and weekend courses to communicate and ensure it is realistic to graduate from BGSU in certain programs by only attending outside of the traditional 8-5 hours</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>

**Improve the efficiency of core administrative function delivery (Finance, HR, IT, Purchasing), enabled by standardized technology, processes, and policies.**

<p><b>A</b></p> <p><b>Annual Benefit:</b></p> <p>By Year 3 \$375 - 425K</p>	<p><b>Redesign Key Spending / Collection Policies</b></p> <ul style="list-style-type: none"> <li>Automate AP and Travel &amp; Expense procedures for increased speed</li> <li>Smoothen the Travel and Purchasing experiences through easier to use Pcard procedures, improved use of Altour, and updated policies and contracts that provide more reliable standards</li> <li>Improve Graduate Student collections</li> </ul>	<p><b>Feasibility Rating:</b></p> <p></p>
<p><b>B</b></p> <p><b>Annual Benefit:</b></p> <p>By Year 3 \$.83-1.20M</p> <p>By Year 5 \$3.40-4.60M</p>	<p><b>Redesign Key Administrative Data &amp; Processes</b></p> <ul style="list-style-type: none"> <li>Improve data availability and integrity through user-friendly and robust management reporting, providing information needed to make decisions</li> <li>Design lean administrative processes throughout BGSU in the functions of IT, Finance, Purchasing, and HR to reduce unnecessary/manual steps and free-up time to dedicate to mission-oriented activities</li> <li>Re-evaluate organizational design to best support lean processes</li> </ul>	<p><b>Feasibility Rating:</b></p> <p></p>
<p><b>C</b></p> <p><b>Annual Benefit:</b></p> <p>By Year 3 \$235-720K</p> <p>By Year 5 \$455-795K</p>	<p><b>Implement BGSU-wide SaaS CRM and ERP Systems</b></p> <ul style="list-style-type: none"> <li>Advertise password and other self-service functionality to reduce inquiries</li> <li>Implement a common "Application to Grave" SaaS CRM/Ticketing package across 9+ departments, supporting other initiatives in this report and improving service to students and alumni</li> <li>Implement SaaS ERP system to reduce lifetime cost of service</li> </ul>	<p><b>Feasibility Rating:</b></p> <p> </p> <p>Oracle CRM/ 11G ERP</p>
<p><b>D</b></p> <p><b>Annual Benefit:</b></p> <p>By Year 3 \$237-304K</p> <p>By Year 5 \$332-535K</p>	<p><b>Rationalize Computer Labs</b></p> <ul style="list-style-type: none"> <li>Over four years, rationalize number of computer labs to be in line with peer institutions</li> <li>Institute a policy recommending Freshmen to bring their own laptops to campus (PlugIn2BGSU), providing laptop funding for students in need</li> <li>Replace decommissioned labs with open quiet rooms, some with printers</li> </ul>	<p><b>Feasibility Rating:</b></p> <p></p>

**Effectively employ human and data resources to attract a greater volume of external donations and funding to the University.**

<p><b>A</b> Annual Benefit:</p> <p>By Year 3 \$420-510K</p> <p>By Year 5 \$470-560K</p>	<p style="text-align: center;"><b>Centralize University Advancement Administration</b></p> <ul style="list-style-type: none"> <li>Centralize IT and finance functions currently performed by University Advancement within the Division of Finance &amp; Administration's existing capabilities reducing administrative costs and improving compliance, data accuracy and consistency</li> </ul>	<p>Feasibility Rating:</p> <p style="text-align: center;"></p>
<p><b>B</b> Annual Benefit:</p> <p>By Year 3 \$15-110K</p> <p>By Year 5 \$370-740K</p>	<p style="text-align: center;"><b>Improve Alumni Data Management and Analytics</b></p> <ul style="list-style-type: none"> <li>Use data analytics to drive solicitation strategies, target high potential alumni segments, and assess and tailor alumni programming in order to reach peer benchmark alumni giving and increase alumni engagement</li> <li>Ensure alumni data is consistent across campus through use of campus-wide CRM system enabling even more effective data analysis</li> </ul>	<p>Feasibility Rating:</p> <p style="text-align: center;"></p>
<p><b>C</b> Annual Benefit:</p> <p>By Year 3 \$90-180K</p>	<p style="text-align: center;"><b>Streamline Grants Management Process</b></p> <ul style="list-style-type: none"> <li>Review and redesign the grants management process to establish a seamless end-to-end process, driving increased employee satisfaction, higher levels of service to faculty, and encouraging increased submissions</li> <li>Continue grant writing support for faculty to further encourage proposal submissions</li> </ul>	<p>Feasibility Rating:</p> <p style="text-align: center;"></p>

**Effectively provide quality operational and auxiliary services to the University to support the educational mission.**

<p><b>A Annual Benefit:</b> By Year 3 \$.28-.51M By Year 5 \$.50-1.09M</p>	<p style="text-align: center;"><b>Conference and Event Services</b></p> <p>Increase the number of events on campus and the revenue per event by:</p> <ul style="list-style-type: none"> <li>• Formalizing role of Conference and Events Services (C&amp;ES) department as the single coordinating point of contact for all events above a minimum threshold on campus</li> <li>• Expanding C&amp;ES access to include all facilities on campus, with a transparent scheduling process and priority usage for department “owner”</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;"></p>
<p><b>B Annual Benefit:</b> By Year 3 \$288-549K</p>	<p style="text-align: center;"><b>Fleet Management</b></p> <ul style="list-style-type: none"> <li>• Launch a vehicle sharing program with high quality vehicles available 24/7; reducing fleet size, promoting vehicle sharing, and reducing rentals when alternatives already exist on campus</li> <li>• Increase cost-effectiveness of campus shuttle by consolidating services on low-utilization routes and responding to community demand for access to Downtown route by sharing cost and service with city</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;"></p>
<p><b>C Annual Benefit:</b> By Year 3 \$352-561K By Year 5 \$402-650K</p>	<p style="text-align: center;"><b>Customer Centric Facilities Management</b></p> <ul style="list-style-type: none"> <li>• Centralize responsibilities for facilities management across campus and create one set of policies and standards for buildings and grounds</li> <li>• Establish a customer-centric facilities management service that includes facility users in decision making, provides transparency into accounting/financial processes, and charges departments based on services provided</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;"></p>
<p><b>D Annual Benefit:</b> By Year 3 N/A By Year 5 N/A</p>	<p style="text-align: center;"><b>BGSU Bookstore of the Future</b></p> <p>Explore two options to get ahead of the declining bookstore market and position BGSU for the future</p> <ul style="list-style-type: none"> <li>• Eliminate traditional bookstore and channel on campus sales through team shop, technology shop, and a pop up bookstore during enrollment rush. Develop robust online store and drive sales through that platform.</li> <li>• Engage with a private provider to manage store on an ongoing basis</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;"></p>

**Effectively provide quality operational services and facilities to the University to support the educational process and auxiliary activities.**

<p><b>E</b></p> <p><b>Annual Benefit:</b>                  By Year 3                  \$.48-.80M                  By Year 5                  \$.82-1.36M</p>	<p style="text-align: center;"><b>Energy Management</b></p> <ul style="list-style-type: none"> <li>• Establish standardized class schedule, including standard class times and full day scheduling, to increase utilization and reduce wasted energy</li> <li>• Expand initial wave of Energy Conservation Measures across campus</li> <li>• Launch Green Awareness Campaign to encourage energy conservation and create sense of accountability for energy reductions</li> <li>• Reduce campus ops at low volume periods (e.g., holiday breaks, summer, etc.) – shift to four day workweek and/or close down underutilized space</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>
<p><b>F</b></p> <p><b>Annual Benefit:</b>                  By Year 3                  \$1.08-1.70M                  By Year 5                  \$1.08-1.82M</p>	<p style="text-align: center;"><b>Energy Rates</b></p> <ul style="list-style-type: none"> <li>• Establish demand limiting function for electricity to avoid peak charges</li> <li>• Continue to explore green cogeneration feasibility, with particular focus on creative financing options that don't require significant capital investment</li> <li>• Engage city in discussions around creative solutions to the high rates charged for electricity</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>

**Expand upon educational delivery platforms, partnerships and high-focus programs to bring more students from application to graduation to career.**

<p><b>A</b> <b>Annual Benefit:</b></p> <p>By Year 3 \$0.46-0.72M</p> <p>By Year 5 \$1.18-1.82M</p>	<p style="text-align: center;"><b>Strengthen High Focus Programs</b></p> <ul style="list-style-type: none"> <li>Strengthen high growth programs. As examples, BGSU can:             <ul style="list-style-type: none"> <li>- Leverage reputation in Education to become a leader in educating STEM teachers, spear heading a “zero cost path to become a STEM educator” initiative through external funding</li> <li>- Explore partnerships with local peers, such as UT, to share offerings for high focus majors that need additional specialized offerings</li> </ul> </li> </ul>	<p><b>Feasibility Rating:</b></p> <p> </p> <p>Internal Programs    Peer Partners</p>
<p><b>B</b> <b>Annual Benefit:</b></p> <p>By Year 3 \$.45-1.51M</p> <p>By Year 5 \$.89-3.2M</p>	<p style="text-align: center;"><b>Leverage Online Education to Serve a Broad Student Mix</b></p> <ul style="list-style-type: none"> <li>Actively develop and encourage online offerings as a way to gain academic credits to increase flexible paths for students to succeed in earning their degree</li> <li>Develop flexible, self paced, year round full online offerings for students to increase enrollment by better supporting the needs of a changing market</li> </ul>	<p><b>Feasibility Rating:</b></p> <p></p>

## **Executive Summary**

## **Summary of Opportunities**

## **Opportunity Charters**

- Organization & Benefits
- Student & Student Services
- Core Administration
- Research & Advancement
- Auxiliary Operations & Facilities
- Education Platform
- Low Focus and In-Flight Opportunity Areas

## **The Path to Change**

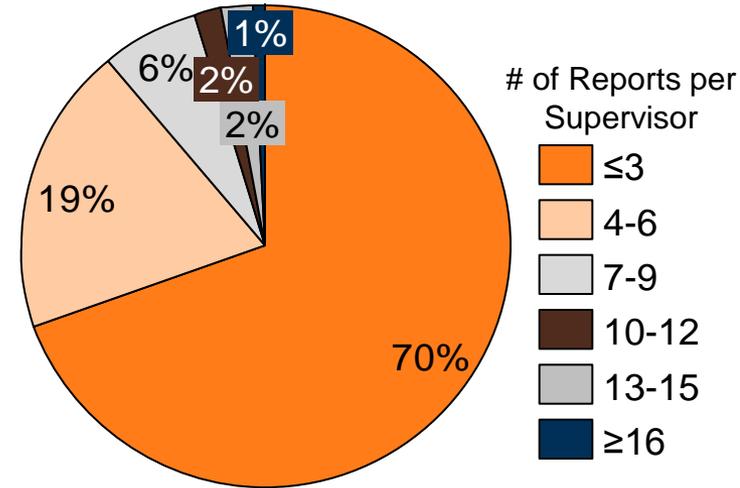
## **Appendix**

## Case for Change

- BGSU has the opportunity to bring its span of control (SOC) ratio, which refers to the ratio of supervisors to direct reports, closer to leading practice ratio for universities
- An average overall SOC ratio that is effective among benchmarked universities is 1:6, with target SOC varying by function; process oriented administrative functions average an SOC of 1:10 – 1:15 while academic and highly specialized operational functions average 1:4 – 1:6
- Experience shows that employee engagement significantly improves with reduced supervisory layers
- The average overall SOC at BGSU is 1:3<sup>1</sup>, with 88% of departments having an SOC below 1:6
- The organizational structure is fragmented, with 49% of departments having fewer than 5 total FTEs

## Supporting Detail

Supervisors by # of Reports



*“Too many bosses; too few employees.”  
“The University has too many organizational layers.”*  
- BGSU Employees

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$1.48-2.15M By Year 5 \$2.52-3.24M	<ul style="list-style-type: none"> <li>• Increase average span of control, which refers to the ratio of supervisors to direct reports, across BGSU to meet the higher education benchmark of 1:6, reallocating supervisory time to mission focus work and driving reduced supervisory layers and increased employee engagement</li> <li>• Reorganize small departments where benchmark cannot be reached given current size</li> </ul>	

Notes: 1. Employees analyzed exclude all undergraduate students, graduate assistants, post docs, and faculty, from analysis, although faculty supervisors were included if their direct reports consisted of administrative or classified staff. Benchmarks used focus on the same employees categories.

Sources: BGSU Interviews 10/2013, BGSU HR Data 10/2013, Accenture Experience

## Project Activities

### Short Term:

- Institute policy that sets a target SOC of 1:6 across BGSU, with minimum SOC by department determined based on functional nature
- Task larger departments to reallocate reports to fewer supervisors, reducing the number of supervisors or reassigning supervisor positions to non-supervisory roles
- Define approval process for introduction of new positions, ensuring SOC is not increased through increased employment

### Long term:

- Consolidate departments where target benchmark cannot be reached given current size, reallocating reports to fewer supervisors

## Potential KPI Improvements

- SOC of 1:6 across University
- SOC of 1:10 – 1:15 for process oriented administrative functions
- SOC of 1:4 – 1:6 for academic and highly specialized operational functions

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.37-.54 <sup>1</sup>	\$.74-1.07	\$1.48-2.15	\$2.00-2.69	\$2.52-3.24
Operating Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Net Benefits</b>	<b>\$.37-.54<sup>1</sup></b>	<b>\$.74-1.07</b>	<b>\$1.48-2.15</b>	<b>\$2.00-2.69</b>	<b>\$2.52-3.24</b>

- **Investment Required:** No investment required
- **Qualitative Benefits:**
  - Increased employee engagement with more autonomy and decreased organizational layers
  - Supervisory time reallocated to mission focus work
- **Resources Required:**
  - Departmental and HR time spent reallocating, restructuring, and position reassignments

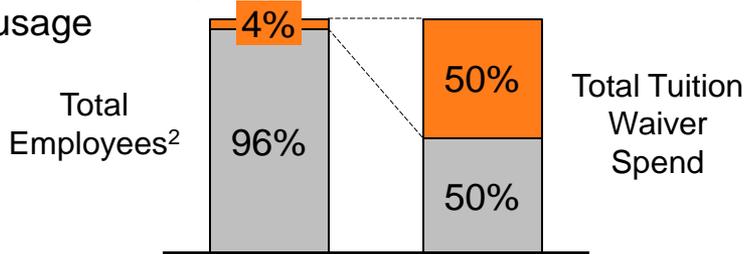
## Risks and Dependencies

- Resistance from supervisors to restructuring and loss of responsibility
- Functional differences of departments preventing natural consolidation

Note: 1. Lower benefits estimate assumes an average SOC of 1:5 is reached, while higher estimate assumes an average SOC of 1:6 is reached

## Case for Change

- ~20% of total BGSU employees use fee waivers, for an average of \$3.6M in total annual benefits
- ~4% of total BGSU employees are using over 50% of the total annual tuition waiver spend; rationalizing benefits will allow continued benefits for all employees while reducing disproportionate usage



- Peer universities have reduced tuition benefits when compared to BGSU, such as partial coverage of graduate and undergraduate fees
- Peer universities have instituted more stringent policies regarding tuition waiver usage beyond credits required for a full degree than BGSU

## Supporting Detail

Tuition Waiver Benefit	BGSU?	All Peers <sup>1</sup> ?
Full-time, part-time, and retired employees are eligible	✓	✓
Dependents and spouses of full-time and retired employees are eligible	✓	✓
100% instructional fee for full-time employees	✓	✓
100% instructional fee for part-time employees	✓	
100% general fee for employees	✓	
100% undergraduate instructional fee for eligible employees and dependents	✓	
100% graduate instructional fee for eligible employees and dependents	✓	
Allows tuition waiver in excess of 1 full degree	✓	

Project Summary		Feasibility Rating:  ●
<b>Annual Benefit:</b> By Year 3 \$260-680K	<ul style="list-style-type: none"> <li>Make tuition fee waivers more sustainable by updating eligibility requirements, thus producing significant benefits while:                         <ul style="list-style-type: none"> <li>Remaining in line with offerings of peer universities</li> <li>Having little to no impact on the vast majority of employees</li> </ul> </li> </ul>	

Note: 1. Peer universities include Ohio State University System universities and those universities officially recognized as peers by the Ohio Board of Regents. 2. Total full-time and part-time Sources: BGSU Interviews 10/2013, BGSU HR tuition waiver usage and benchmarking data 10/2013, University System of Ohio peer university websites

## Project Activities

- Work with University community to determine which future fee waiver policy is most appropriate:

Current Benefit	Potential Future Benefits			
Allows tuition waiver in excess of 1 full degree	Does not allow tuition waiver in excess of 1 full degree, with failed or dropped courses counted towards the maximum credit limit			
100% instructional fee for full-time employees	No change	No change	No change	No change
100% instructional fee for part-time employees	50%	50%	50%	50%
100% undergraduate instructional fee for eligible dependents	No change	No change	80%	80%
100% graduate instructional fee for eligible dependents	50%	0%	50%	0%
Net Annual Benefits	~260K	~370K	~570K	~680K

- No future benefits are more aggressive than those provided by BGSU peers

## Potential KPI Improvements

- 20-30% reduction in tuition waiver spend per year

Notes: 1. Estimated loss of SSI funding due to decreased enrollment and total SCH has been taken into account when calculating benefits.

2. Considered reduction of fee waiver benefits for retirees but found no peer university with reduced retiree benefits 3. Benefits assumes general fee for staff SCH is no longer allocated from general budget

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$0	\$260-680	\$260-680	\$260-680	\$260-680
Operating Cost	\$20	\$0	\$0	\$0	\$0
<b>Net Benefits</b>	<b>(\$20)</b>	<b>\$260-680</b>	<b>\$260-680</b>	<b>\$260-680</b>	<b>\$260-680</b>

- **Investment Required:** No investment required
- **Qualitative Benefits:**
  - Increased focus on degree attainment and speed to graduation for dependents
- **Resources Required:**
  - HR effort spent on updating policies

## Risks and Dependencies

- Reduced benefits may deter potential employees
- Resistance from current employees
- Ensure policies comply with all current contracts

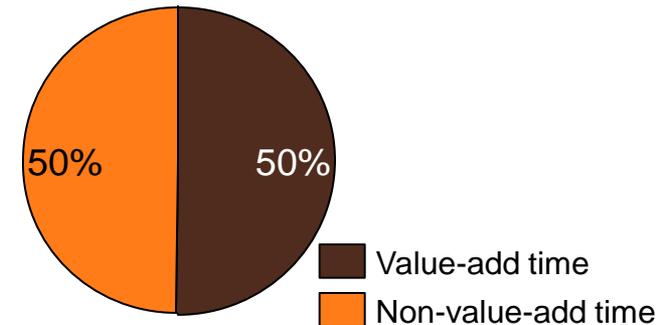
## Case for Change

- Staff at BGSU have voiced concerns that a wide variety of administrative and operational processes are long, cumbersome, and paper-heavy
- Based on staff input and Accenture experience regarding higher education processes that yield the highest potential benefits, 13 preliminary processes<sup>1</sup> have been identified where there is opportunity to improve process efficiency
- Lean Six Sigma business process redesign efforts in the public sector have resulted in an average efficiency improvements of over 40%-60%
- Lean initiatives have already been undertaken at BGSU, resulting in a reduction in process steps of 50% for administrative hiring and 70% for graduate student scholarships and stipend processing

## Supporting Detail

### Value-Add vs. Non-Value-Add Time in a Business Process

Most public sector processes consist of 40-60% non-value added work



*“Coming in as a new employee, processes across the University seem very immature.”*  
*“One of the biggest issues for the University is paper-heavy processes.”*  
 -BGSU Employees

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$.28-.64M By Year 5 \$.75-1.51M	<ul style="list-style-type: none"> <li>• Analyze and improve administrative and operational processes across the University, targeting process efficiencies of 20-40%, driving increased employee and end-user satisfaction and establishing a cultural focus on continuous improvement</li> </ul>	

Note: 1. Preliminary identified processes: recruitment, admissions, transfers, scholarship selection, enrollment, registration, records management, financial aid, scholarship disbursement, student hiring, gifts processing, custodial, and grounds keeping (Review of grants management processes is covered in opportunity 4C)

Sources: BGSU Interviews 10/2013, BGSU HR Data 10/2013, Accenture Experience

## Project Activities

- Assess 13 preliminarily identified (and any additional cumbersome processes) against sector leading practices to confirm where there is opportunity for process improvement and finalize processes to be reviewed
- Tackle 6-9 processes per year, for an expected period of 2 years
- Establish continuous improvement approaches to ensure processes continue to improve once initial effort is complete
- Ensure full value of efficiency improvements are realized once improved processes are implemented

## Potential KPI Improvements

- Target at least 20%-40% cycle time reduction per process (public sector average is 40% - 60% cycle time reduction per process)

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$0.00	\$0.00	\$0.36-.72	\$0.75-1.51	\$0.75-1.51
Operating Cost	\$0.08	\$0.15	\$0.08	\$0.00	\$0.00
<b>Net Benefits</b>	<b>(\$0.08)</b>	<b>(\$0.15)</b>	<b>\$0.28-.64</b>	<b>\$0.75-1.51</b>	<b>\$0.75-1.51</b>

- **Investment Required:** Investment in support resources may be required
- **Qualitative Benefits:**
  - Greater focus on value-add activities
  - Increased employee and end-user satisfaction
  - Greater cultural focus on continuous improvement
- **Resources Required:**
  - Assistance from Strategic Initiatives in process redesign effort, as well as departmental support redesigning processes

## Risks and Dependencies

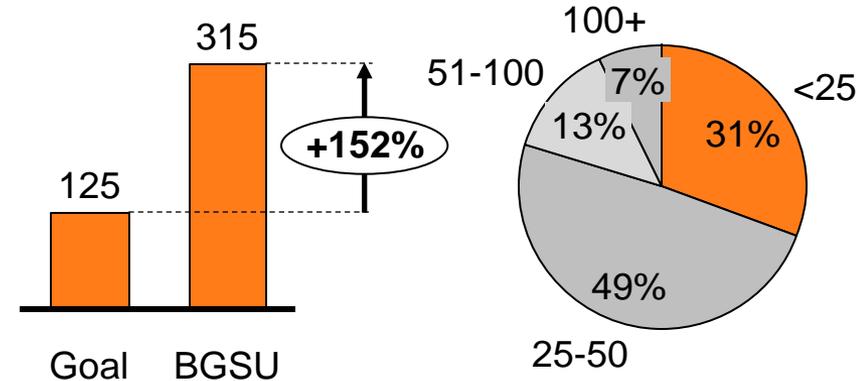
- Full benefits for certain processes dependent upon implementation of campus-wide CRM
- Resistance from employees to change
- May uncover need for new systems in order to realize efficiency gains

## Case for Change

- The BGSU general education curriculum must define clear pathways for students to complete a degree in a timely way
- It is our understanding that the Faculty Senate has approved an effort to re-authenticate general education courses at BGSU
- BGSU has defined a goal to offer 125 general education courses, while currently there are 315 approved general education courses, resulting in many classes that are under-enrolled
- 34 new general courses were introduced in the last 5 years
- Across 2 semesters, 300 general education lecture sections had fewer than 25 students
- Several BGSU peers have instituted minimum class size policies, discontinuing courses that consistently fall below a minimum enrollment threshold

## Supporting Detail

# General Education Courses      General Education Lecture Sections by # Students Enrolled



*“There are too many general education courses, with many specialized courses that seem to be more geared towards faculty interests than student interests.”*  
 -BGSU Student

Project Summary		Feasibility Rating:  ●
<b>Annual Benefit:</b> By Year 3 \$1.45-2.68M	<ul style="list-style-type: none"> <li>• Review general education offerings with consistently low enrollment to ensure course offerings are focused on student interests and define clear pathways for students to complete a degree in a timely way</li> <li>• Institute a minimum enrollment policy of 20-25 students for general education lecture courses</li> </ul>	

Note: 1. Peer universities include Ohio State University System universities and those universities officially recognized as peers by the Ohio Board of Regents.

Sources: BGSU Interviews 10/2013, BGSU Perspective courses, BGSU Class Enrollment Data 10/2013, BGSU peer university websites

## Project Activities

- Institute policy establishing an overall minimum class enrollment size of 20-25 students for general education lectures
  - Reduce total sections offered for courses that fail to meet minimum target enrollment
  - Ensuring policy is flexible to allow for exceptions, such as courses required to complete a degree
- Review general education course offerings, discontinuing courses that consistently fail to meet minimum class enrollment
- Regulate the introduction of new general education courses to ensure total general education courses do not continue to increase at the same rate as previous years

## Potential KPI Improvements

- Total students enrolled per general education class
- Total general education classes offered

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$1.45-2.68	\$1.45-2.68	\$1.45-2.68	\$1.45-2.68	\$1.45-2.68
Operating Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Net Benefits</b>	<b>\$1.45-2.68</b>	<b>\$1.45-2.68</b>	<b>\$1.45-2.68</b>	<b>\$1.45-2.68</b>	<b>\$1.45-2.68</b>

- **Investment Required:** No investment required
- **Qualitative Benefits:**
  - General Education course offerings that are more tailored towards student interests
- **Resources Required:**
  - Effort of administrators and faculty to restructure course offerings

## Risks and Dependencies

- Resistance from Faculty to change in general education offerings
- Increased average students per class

## **Executive Summary**

## **Summary of Opportunities**

## **Opportunity Charters**

- Organization & Benefits
- Student & Student Services
- Core Administration
- Research & Advancement
- Auxiliary Operations & Facilities
- Education Platform
- Low Focus and In-Flight Opportunity Areas

## **The Path to Change**

## **Appendix**

## Case for Change

- Staff interviews pointed to student services being centered around staff needs, resulting in reduced student satisfaction and administrative inefficiencies
- A student interacts with 5 distinct depts. – Registrar, Admissions, Financial Aid, Bursar, Academic Advising, to carry out core activities (i.e. enrolling, registering, financing tuition, etc.)
- Services are rendered in three main locations: Administration Building, McFall, and the College in which each student is enrolled
- Student feedback points to a demand for automated, online ability to obtain streamlined information from various departments
  - For example: Consolidated information from Bursar and Financial Aid

## Supporting Detail

### Examples of Universities with end-to-end Student Services

University	Implementation Date
Indiana University	Currently in progress
McGill University Service Point	2011
University of Nevada – Las Vegas	2003
Drexel University – Central	2013
St. Josephs' University Hawk Central	Unavailable
Cleveland State Campus 411 All-In-1	Unavailable

*“I needed information from several depts. in order to pay my bill; the delay caused a late fee.”*

Annual Benefit:	Project Summary	Feasibility Rating:
By Year 3 \$129-\$150K  By Year 5 \$258-\$300K	<ul style="list-style-type: none"> <li>• Launch co-located student services that allows students to easily navigate Registrar, Admissions, Financial Aid, Bursar, and Advising processes</li> <li>• This approach increases student satisfaction by providing a single point of contact for students while retaining deep functional expertise</li> </ul>	

### Project Activities

- Validate potential centralized location for feasibility (e.g. adequate space and accessibility)
- Conduct detailed analysis of FTE needs under new model and create new organizational structure
- Relocate departments into one physical location
- Utilize new CRM system to automate eligible tasks (i.e. dropping courses, changing schedules) reducing the volume of inquiries due to improved self-serve capabilities
- Ensure flexibility of services during off hours (e.g. online and phone options )
- Develop cross training plan for new front line team
- Communicate service offerings to student body and track changes in satisfaction and performance
- Generally, savings of 10% are realized due to decreased costs to process inquiries

### Potential KPI Improvements

- Increase student satisfaction on annual surveys
- Reach first contact resolution target of 75%

### Estimated Value

Costs and Benefits ( <i>Thousands</i> )					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$0	\$0	\$129-150	\$258-300	\$258-300
Operating Cost	\$0	\$0	\$0	\$0	\$0
<b>Net Benefits</b>	<b>\$0</b>	<b>\$0</b>	<b>\$129-150</b>	<b>\$258-300</b>	<b>\$258-300</b>

- **Investment Required:** Investment is reflected in the BGSU wide CRM system. Additional investment of 300K-500K will be necessary to revamp Bookstore space
- **Qualitative Benefits:** Increase student satisfaction by creating easily accessible services
- **Resources Required:** A student accessible location in the second floor of bookstore has been suggested

### Risks and Dependencies

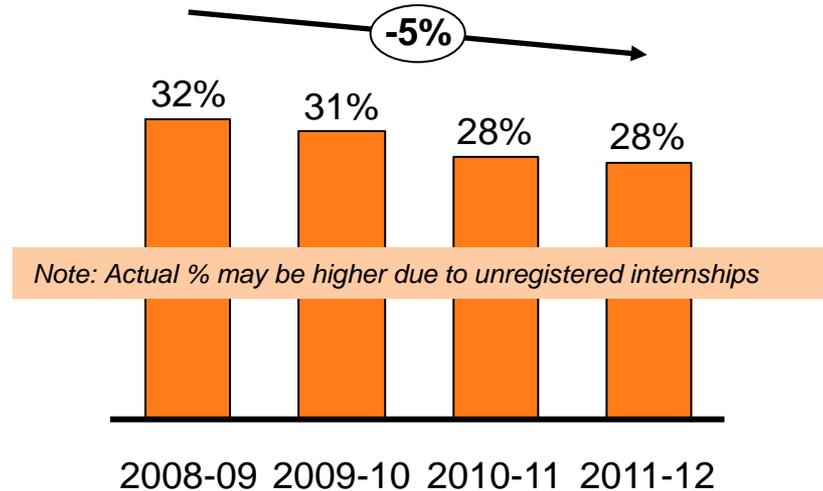
- Significant cross-departmental coordination is required for continued success of the initiative

## Case for Change

- Employers expect ~1/3 of their total new college hires will come from their internship/co-ops
- Participation in internships/co-ops has been on the rise in the U.S. In 2013, 63.2% of graduating seniors had completed one or both. In contrast, BGSU's students registered in internship/co-op courses have declined
- Internship/co-op requirements and participation vary widely by program
- Tracking student participation in not-for-credit internships is limited to voluntary self reporting
- For BGSU's class of '13, only 51% of BGSU's class of '13 reported satisfaction with career services, 39% were neutral and 10% were dissatisfied
- No standard career programs for graduate students

## Supporting Detail

Total BGSU students registered for co-ops and internships as % of total enrollment



*“Employers have to speak to two, sometimes three BGSU staff to get things done.”*

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$0.69-.88M By Year 5 \$1.33-1.97M	<ul style="list-style-type: none"> <li>• Require departments to integrate career experiences to curricula as applicable to specific courses of study</li> <li>• Increase collaboration among internship, co-op, and career activities to improve student satisfaction, grow student participation in internships/co-ops, increase job placement for graduates, and gain administrative efficiencies</li> </ul>	

## Project Activities

- Define roles of entities that involve faculty/companies in the internship/co-op process (e.g. college boards, career planning board, dept. boards)
- Assess capability of a University-wide Advisory Board to coordinate employer engagement
- Review feasibility of internship, or similar, requirement
- Increase collaboration across the career center and internship/co-op center to optimally engage employers and avoid uncoordinated contacts.
- Leverage relationship with the State to share statewide online job board OhioMeansJobs.com
- Establish shared tracking system that accurately tracks student participation in internships
- If the improved internship/co-op/job placement increases undergraduate and graduate enrollment by 1%-1.5%, BGSU will see a benefit of over \$2M

## Potential KPI Improvements

- Increase % of students graduating with internships/co-ops
- Increase % of graduating students placed in jobs
- Increase student satisfaction in graduating class surveys

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.08-.08	\$.16-.24	\$.80-1.04	\$1.28-1.84	\$1.60-2.41
Operating Cost	\$.04-.04	\$0.00	\$.11-.16	\$.22-.32	\$.27-.43
<b>Net Benefits</b>	<b>\$.04-.04</b>	<b>\$.16-.24</b>	<b>\$.69-.88</b>	<b>\$1.06-1.52</b>	<b>\$1.33-1.97</b>

- **Investment Required:** No additional investment is required
- **Qualitative Benefits:** Increase students' satisfaction with services resulting in increased enrollment in degree programs
- **Resources Required:** Faculty cooperation is needed to assess internship requirements and grow Advisory Board Models with employers

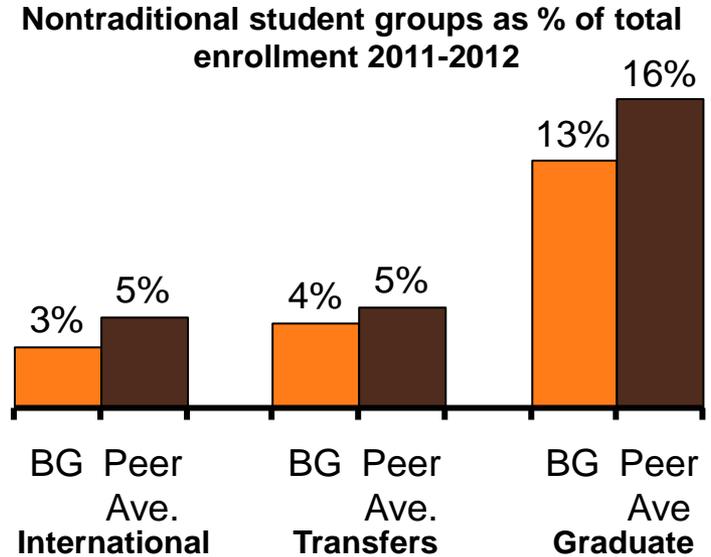
## Risks and Dependencies

- Employer willingness to participate may vary, work with Development to leverage alumni networks with hiring capacity in target companies

## Case for Change

- Prior studies show a need to attract students beyond the traditional residential undergraduate
- National enrollment of students 25 and older is on the rise; it rose 42% during from 2000-2010
- BGSU is behind its Ohio peers in the enrollment of international, graduate, and transfer students
- Nontraditional students require greater flexibility of time/place of services, student surveys signal a demand for flexible course schedules
- Research points to the top 3 areas of importance for adult students: instructional effectiveness, academic advising, and campus climate
- BGSU's nontraditional student offerings are limited (e.g. no orientation for transfers, career center with limited schedule, remote tutoring available only in some subjects, little immigration support)

## Supporting Detail



*"I was nearly sent back to my home country due to incorrect University paperwork."*

Project Summary		Feasibility Rating:
<p><b>Annual Benefit:</b></p> <p>By Year 3 \$0.89-1.41M</p> <p>By Year 5 \$2.18 -3.37M</p>	<ul style="list-style-type: none"> <li>• Create tailored student services programming to better support the needs of nontraditional students</li> <li>• Increase flexibility of academic offerings with evening and weekend courses to communicate and ensure it is realistic to graduate from BGSU in certain programs by only attending outside of the traditional 8-5 hours</li> </ul>	<p>●</p>

## Project Activities

- Immediately institute several key transfer options, e.g. flexible housing requirements
- Implement priority registration for distance learners
- Develop tailored student services programming, e.g. orientation for transfers, visa assistance, more subjects in remote tutoring, flexible academic advising and career center hours
- Identify programs where BGSU can make it possible to graduate even if students attend class *only* outside traditional hours of 8am-5pm
- Involve students in planning tailored programs
- Additional tuition revenue is accrued if enrollment targets for transfer, international, and graduate students set by previous assessments are met
- Invest in growing the offering, allowing for a time period of low enrollment during ramp-up period

### Potential KPI Improvements

- Increased enrollment of nontraditional students
- Increased nontraditional student satisfaction with programming

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.11-.18	\$.40-.63	\$1.22-1.91	\$2.06-3.24	\$2.79-4.41
Operating Cost	\$.16-.16	\$.22-.22	\$.32-.49	\$.49-.71	\$.60-1.04
<b>Net Benefits</b>	<b>(\$.05-.02)</b>	<b>\$.19-.41</b>	<b>\$.89-1.41</b>	<b>\$1.51-2.53</b>	<b>\$2.18-3.37</b>

- **Investment Required:** No investment required
- **Qualitative Benefits:** Increased student satisfaction and enrollment due to tailored programming and flexible offerings
- **Resources Required:** Flexible course offerings during evenings and weekends will require faculty buy-in

## Risks and Dependencies

- The growing nontraditional market may spur significant competition for BGSU

## **Executive Summary**

## **Summary of Opportunities**

## **Opportunity Charters**

- Organization & Benefits
- Student & Student Services
- Core Administration
- Research & Advancement
- Auxiliary Operations & Facilities
- Education Platform
- Low Focus and In-Flight Opportunity Areas

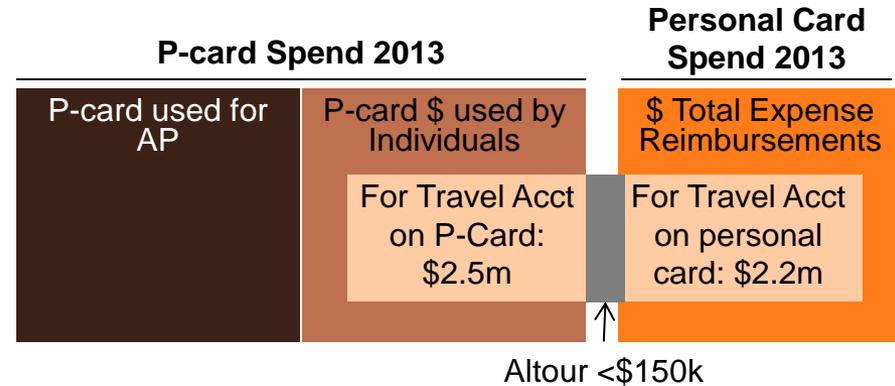
## **The Path to Change**

## **Appendix**

## Case for Change

- **Accounts Receivable:**
  - A higher % of graduate students have a balance >60 days (22% vs. 19%) and for a greater average amount (\$2060 vs. \$1589) compared to Sophomores, Juniors, and Seniors
  - Non-student AR is dispersed/unknown process
- **Accounts Payable Process:**
  - Invoices are sent by paper to departments from the biller, then onto AP only when department is ready
  - 92 users enter \$4.6m+ in travel expenses, with 80% of 20,000 lines being entered by 2 users
  - Travel expense reimbursement is 100% manual

## Supporting Detail



- **Purchasing & Travel:**
  - Pcard usage has shown a general increasing trend and has significant oversight
  - Interviews indicate Falcon Purch is not always used even if there is a better contract available
  - Less than 3% of travel spend is on a managed travel system and personal cards are used to pay for just under 50% of travel

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$375 - 425K	<ul style="list-style-type: none"> <li>• Automate AP and Travel &amp; Expense procedures for increased speed</li> <li>• Smoothen the Travel and Purchasing experiences through easier to use Pcard procedures, improved use of Altour, and updated policies and contracts that provide more reliable standards</li> <li>• Improve Graduate Student collections</li> </ul>	

## Project Activities

- **Accounts Receivable:** Bring graduate students to average default rate through a deregistration program, saving ≈140K annually
- **Accounts Payable:** Alter procedure to send AP invoices directly to Finance with electronic approval workflow for departments
- **Travel & Expense:** Analyze Travel & Expense spending to better articulate which spend is eligible for Altour, which is eligible for Pcard. Implement Concur or similar system for \$50K annual cost, require use of managed travel system for travel bookings as part of enforced travel policy, and allow P-card use on travel only through the managed travel system
- **Purchasing:** Analyze Falcon Purch purchasing and contract data to determine product categories to add to Falcon Purch and mandate its use

### Potential KPI Improvements

- Invoices processed per FTE
- % graduate students with balances; average >60 day balance
- % purchasing spend on Falcon Purch, Pcard, Altour

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$130-140	\$275-310	\$425-475	\$425-475	\$425-475
Operating Cost	\$15	\$80	\$50	\$50	\$50
<b>Net Benefits</b>	<b>\$115-125</b>	<b>\$195-230</b>	<b>\$375-425</b>	<b>\$375-425</b>	<b>\$375-425</b>

- **Investment Required:** Initial investment to implement Concur
- **Qualitative Benefits:**
  - Take advantage of more optimal payment terms
  - More hassle-free Travel & Expense and AP process for employees
  - Greater variety of goods on Falcon Purch for a better price
- **Resources Required:** Internal project team

### Risks and Dependencies

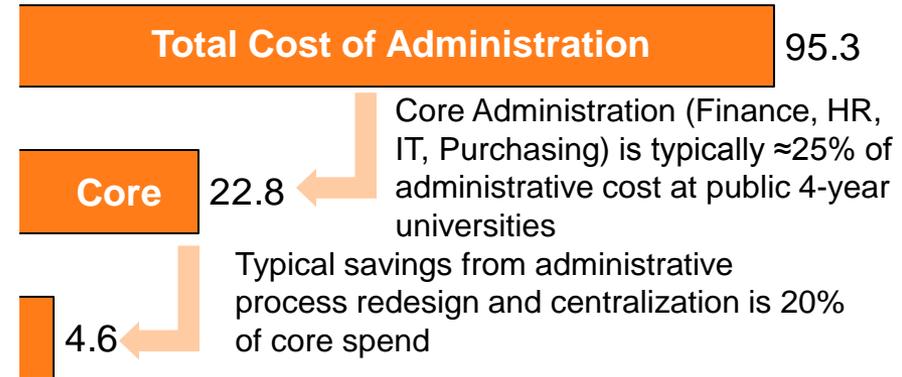
- Resistance to policy adherence

## Case for Change

- Over \$7.3M is spent on administrative/classified activity in non-administrative departments within colleges
- Primarily administrative units are also currently responsible for some administrative work not core to their function (e.g., IT in Residence Life)
- Firelands is conducting some administrative activity that is not location-specific
- Lack of functioning data warehouse/management reporting system results in estimated average 10-15% of supervisor time and 20 FTEs spending significant time on management reporting. Several systems have been tried and failed
- By redesigning administrative processes to have fewer steps, be more automated, and have a greater portion delivered centrally, the typical 4-year public university realizes a savings of 20%

## Supporting Detail

### Typical Benefits Redesigning Core Administration (\$M)



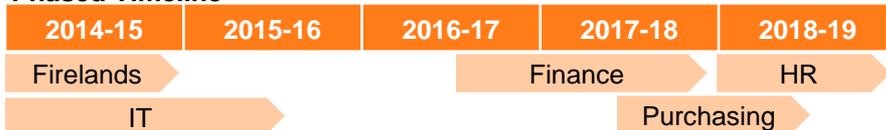
*“Why do we need to get the same signature three times? On pieces of paper? Every semester?”*

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$.83-1.20M By Year 5 \$3.40-4.60M	<ul style="list-style-type: none"> <li>• Improve data availability and integrity through user-friendly and robust management reporting, providing information needed to make decisions</li> <li>• Design lean administrative processes throughout BGSU in the functions of IT, Finance, Purchasing, and HR to reduce unnecessary/manual steps and free-up time to dedicate to mission-oriented activities</li> <li>• Re-evaluate organizational design to best support lean processes</li> </ul>	

## Project Activities

- Implement OBIEE<sup>1</sup> management reporting system, gathering requirements from across BGSU
- Develop detailed plan for centralized services
  - Conduct % time survey to understand % time spent on core administrative processes
  - Design leading practice processes for the future through workshops with functional managers, verifying which parts of processes should be delivered centrally vs. in the departments
  - Develop service delivery model (organizational design, governance, SLAs, operating model)
  - Define technology and policy changes required
- Integrate regular input from the BGSU community

### Phased Timeline



## Potential KPI Improvements

- Improved satisfaction with administrative services among employees and students
- A set of function-specific KPIs will be determined as part of the planning phase

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.16-.20	\$.98-1.30	\$.98-1.30	\$2.40 -3.30	\$3.40-4.60
Operating Cost	\$.23	\$.23-.30	\$.10-.15	\$.15-.23	\$.00
<b>Net Benefits</b>	<b>(\$.07-.03)</b>	<b>\$0.68-1.00</b>	<b>\$.83-1.20</b>	<b>\$2.20-3.15</b>	<b>\$3.40-4.60</b>

- **Investment Required:** Management Reporting System cost to be acquired through RFP. Benefits from reporting is counted in the Span of Control initiative that it enables. Investment for planning consultant recommended
  - **Qualitative Benefits:** Better customer service, work environment with greater development possibilities, improved compliance/risk profile
  - **Resources Required:** Dedicated BGSU project team
- ### Risks and Dependencies

- Right timing with technology implementation
- Need to create appropriate SLAs, governance and chargeback model to create responsive central services with high customer service

Notes 1: BGSU has already tried and quit Crystal Reports, Cognos, and Business Objects. OBIEE is the most robust front end, integrates well with Peoplesoft and other SaaS ERPs

## Case for Change

- Use of password self-service drastically reduces inquiries, but students have shown a lack of awareness of this functionality
  - Password changes were estimated to be 50% of the 34,626 calls logged in FY2013 with ITS, taking up the time of 2.5-3.5 Tech Support Specialists
- Existence of 9+ CRM/Ticketing systems is inefficient and results in subpar service
  - Double entry of CRM data can take effort for 1-2 FTEs per department with double entry
  - Departmental IT support effort
  - Inconsistent or inaccurate donor/customer lists
- Compared to non-SaaS, a SaaS ERP typically provides 20% savings over a 10 year “lifetime”

## Supporting Detail

- Some examples of departments with CRM/Ticketing:
  - Admissions (limited mySQL custom system)
  - College of Business (for admissions)
  - College of E&HD (for admissions)
  - College of Musical Arts (for admissions)
  - Development/Advancement/Foundation
  - Financial Aid
  - Firelands (separate donor list)
  - ITS
  - Operations
  - WBGU (separate donor list)

*“We have solicited deceased alumni even after the family has notified us because our CRM systems don’t talk to one another. This has gone to the President.”*

<p><b>Annual Benefit:</b></p> <p>By Year 3 \$235-720K</p> <p>By Year 5 \$455-795K</p>	<p align="center"><b>Project Summary</b></p> <ul style="list-style-type: none"> <li>• Advertise password and other self-service functionality to reduce inquiries</li> <li>• Implement a common “Application to Grave” SaaS CRM/Ticketing package across 9+ departments, supporting other initiatives in this report and improving service to students and alumni</li> <li>• Implement SaaS ERP system to reduce lifetime cost of service</li> </ul>	<p><b>Feasibility Rating:</b></p> <p align="center">  Oracle 11G                  CRM/ERP             </p>
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## Project Activities

- Develop detailed business case for each system initiative (CRM/ERP)
- Make password self-service functionality more prominent on help desk and portal pages
- Select and implement CRM/Ticketing System, target start 2015:
  - Gather function and process representatives across relevant departments to understand requirements, especially when linked with other dependent initiatives
  - Conduct RFP process to choose software
  - Implement system simultaneous with business process redesign across 6 months to 1 year
- Select and implement SaaS ERP System according to similar process as above, target start 2016

## Potential KPI Improvements

- # password inquiries to ITS support reduce 50%
- Student & alumni satisfaction with services
- Cost to service CRM and ERP systems

## Estimated Value

Costs and Benefits (Thousands) – CRM/10G only					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits*	\$165-230	\$165-230	\$450-800	\$520-800	\$520-800
Operating Cost*	\$0-75	\$75-150	\$80-215	\$5-65	\$5-65
<b>Net Benefits*</b>	<b>\$95-230</b>	<b>\$15-155</b>	<b>\$235-720</b>	<b>\$455-795</b>	<b>\$455-795</b>

- **Investment Required:** CRM/Ticketing \$600K – 2.5M, ERP \$3-5M
- **Qualitative Benefits:** Improved student/alumni satisfaction from CRM. SaaS ERP benefits are not included here as a more detailed business case is required
- **Resources Required:** Relevant departments to provide expertise on functional requirements. Dedicated project resources from ITS and external implementer required

## Risks and Dependencies

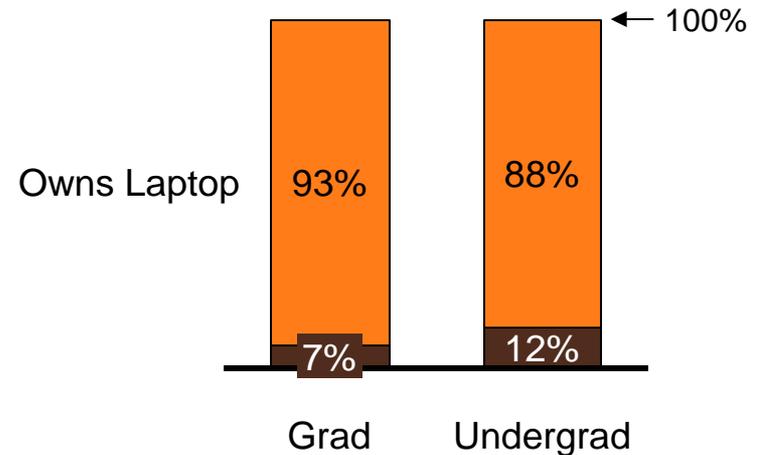
- Implement CRM concurrently with BPR and institution of “One Stop Student” Inquiry center
- Administrative process changes are more effective in conjunction with an ERP initiative

## Case for Change

- Number of computer labs, supported stations, and staffing is excessive compared to peer institutions
  - Typical peers have 4-14 non-classroom, public labs, usually in libraries, with min 1 being 24hrs
- Freshmen bring an average 3 devices to BGSU
- Pell Grant “Laptop Loan” program recipients have dropped from 50 to 7 in just two years
- BGSU is spending an average of \$626 per lab computer annually
  - \$550k in lab equipment, \$382k in student labor, \$136k in electricity for lab computers
  - 11 Special Labs (330+ computer stations), 35 Academic Labs (1000+ computer stations), 53 Residential Labs (300+ computer stations)

## Supporting Detail

% University Students Owning Laptops, 2010



311 Colleges and Universities have some type of laptop, notebook, or iPad program. Many are requirements for all students (e.g., University of Dayton) or for certain programs, (e.g., University of Cincinnati's Engineering program)

Project Summary		
<p><b>Annual Benefit:</b></p> <p>By Year 3 \$237-304K</p> <p>By Year 5 \$332-535K</p>	<ul style="list-style-type: none"> <li>• Over four years, rationalize number of computer labs to be in line with peer institutions</li> <li>• Institute a policy recommending Freshmen to bring their own laptops to campus (PlugIn2BGSU), providing laptop funding for students in need</li> <li>• Replace decommissioned labs with open quiet rooms, some with printers</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>

Source: Data from the CIO at BGSU, Pew Research, Westminster-MO

## Project Activities

- Reduce the number of desktop stations to better reflect amount at peer universities
- Conduct survey to understand # students without a laptop and develop BGSU Dell and HP Laptops
- Launch Advancement campaign to fund laptops for students in need to supplement Pell program
- Market the “PlugIn2BGSU” concept that highly recommends all students have their own desktop/laptop
- Over four years, remove desktops and staff from decommissioned labs and open for student use.
  - **Option 1:** Remove desktops from Residence Hall labs and from the 13 small labs with fewer than 23 computers
  - **Option 2:** As above plus all off-grid labs except the Union

## Potential KPI Improvements

- Total lab cost per student to go down
- Maintain 100% capability of students to procure their own device through financial aid, laptop loan, or own means.

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$93	\$190	\$237-304	\$284-420	\$332-535
Operating Cost	\$0	\$0	\$0	\$0	\$0
<b>Net Benefits</b>	<b>\$93</b>	<b>\$190</b>	<b>\$237-304</b>	<b>\$284-420</b>	<b>\$332-535</b>

- **Investment Required:** Minimal investment if decision is made to outfit empty labs with docking amenities
- **Qualitative Benefits:** Increased computer literacy through more regular use of laptops
- **Resources Required:** Few ITS resources to decommission. Admissions resources to communicate recommendation to bring laptops. Advancement resources to start laptop campaign

## Risks and Dependencies

- Incoming students in need require sufficient support to procure laptops and student support needs to be secured
- Without the right pace of decommissioning, risk of insufficient lab computers

## **Executive Summary**

## **Summary of Opportunities**

### **Opportunity Charters**

- Organization & Benefits
- Student & Student Services
- Core Administration
- Research & Advancement
- Auxiliary Operations & Facilities
- Education Platform
- Low Focus and In-Flight Opportunity Areas

## **The Path to Change**

## **Appendix**

## Case for Change

- There is duplication within finance and IT functions of University Advancement and central Finance and Administration and the capacity exists to centralize
- 4 FTEs currently perform IT functions which overlap with the capabilities of central ITS
- 4 FTEs currently perform accounts payable, accounting, and other financial functions which overlap with the capabilities of central Finance and Administration
- Efficiency improvements can be realized from centralization of the currently distributed functions

## Supporting Detail

Finance & Administration Functions	Duplicative Function Exists in University Advancement?
Controller	✓
Accounts Payable	✓
Financial Accounting & Reporting	✓
ITS	✓

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$420-510K By Year 5 \$470-560K	<ul style="list-style-type: none"> <li>• Centralize IT and finance functions currently performed by University Advancement within the Division of Finance &amp; Administration's existing capabilities reducing administrative costs and improving compliance, data accuracy and consistency</li> </ul>	

## Project Activities

### Short Term:

- Centralize 3 IT FTEs into existing ITS support capabilities, retaining 1 IT FTE within University Advancement to provide on-site reporting and other system support to Advancement staff
- Centralize 4 Finance FTEs into existing support capabilities within the Office of the Controller
- Agree upon clear service level agreements between Finance & Administration and University Advancement

### Long Term:

- With the adoption of a campus-wide CRM system, completely centralize University Advancement IT staff within ITS

## Potential KPI Improvements

- Administrative cost per gift disbursement
- Administrative cost for IT support of University Advancement staff

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$420-510	\$420-510	\$420-510	\$470-560 <sup>1</sup>	\$470-560
Operating Cost	\$0	\$0	\$0	\$0	\$0
<b>Net Benefits</b>	<b>\$420-510</b>	<b>\$420-510</b>	<b>\$420-510</b>	<b>\$470-560</b>	<b>\$470-560</b>

- **Investment Required:** No additional investment required<sup>1</sup>
- **Qualitative Benefits:**
  - Improves compliance, data accuracy and consistency, and reduces doubles entry
- **Resources Required:**
  - Training on new functions for any reassigned positions

## Risks and Dependencies

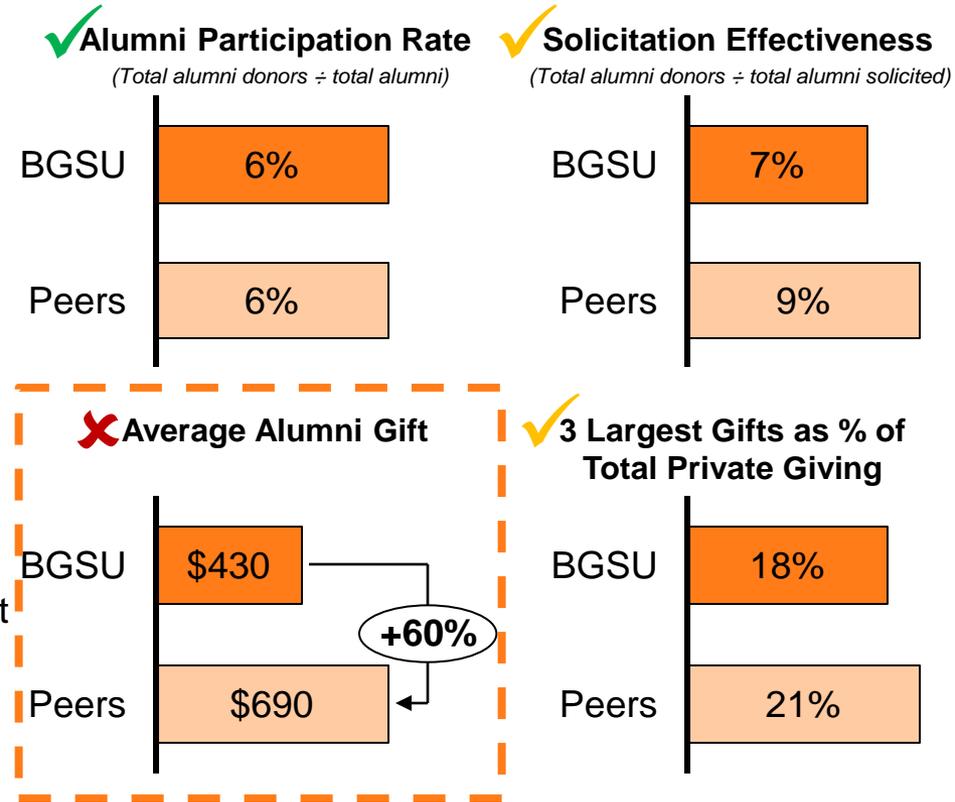
- In the short-term, central IT must develop deep knowledge of current alumni system
- Long-term IT benefits are dependent upon implementation of a campus-wide CRM system
- Centralized finance functions must retain responsiveness and high-touch service to donors

Note: 1. Investment for campus-wide CRM system captured under CRM opportunity

## Case for Change

- Benchmarking BGSU private giving against peers<sup>1</sup> reveals there is significant opportunity to increase the average alumni gift to reach peer average
- There is also opportunity to improve solicitation effectiveness and magnitude of major gifts
- In an effort to increase giving, alumni programming at BGSU is shifting towards more engaging opportunities for alumni (e.g. internship collaboration), however decisions regarding solicitation strategies and alumni programming are not sufficiently data-driven
- The current prospect research tool is inadequate, and prospects with highest propensity to give are not being actively and accurately tracked and targeted
- BGSU alumni data is maintained across the University in separate systems resulting in inconsistent information

## Supporting Detail



Project Summary		Feasibility Rating:  ●
<b>Annual Benefit:</b> By Year 3 \$15-110K By Year 5 \$370-740K	<ul style="list-style-type: none"> <li>• Use data analytics to drive solicitation strategies, target high potential alumni segments, and assess and tailor alumni programming in order to reach peer benchmark alumni giving and increase alumni engagement</li> <li>• Ensure alumni data is consistent across campus through use of campus-wide CRM system enabling even more effective data analysis</li> </ul>	

Note: 1. Peer universities include Ohio State University System universities and those universities officially recognized as peers by the Ohio Board of Regents.

Sources: BGSU Interviews October 2013, BGSU and Peer giving data taken from The Council for Aid in Education's 'Voluntary Support of Education' 2012 publication

## Project Activities

- Use data analytics to drive decision making
  - Segment alumni based on characteristics and behavior to develop targeted solicitation strategies
  - Understand giving trends and target high potential segments
  - Analyze alumni engagement, preferences (alumni survey planned for spring 2014), and ROI, to evaluate and drive alumni programming
- Implement new prospect research system if capabilities of current system inadequate (effort in progress with external consultant<sup>1</sup>)
- To maximize benefits from data analysis, maintain all alumni data on centralized CRM system<sup>2</sup> allowing consistent management and analysis of alumni data and facilitating lifecycle management of student information

## Potential KPI Improvements

- Increase average alumni gift by 20-40%, with a target of \$690
- Target solicitation effectiveness of 9% or higher
- Increase value of largest major gifts by at least 20%

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$90-185 <sup>3</sup>	\$90-185	\$90-185	\$370-740	\$370-740
Operating Cost	\$75	\$75	\$75	\$0	\$0
<b>Net Benefits</b>	<b>\$15-110</b>	<b>\$15-110</b>	<b>\$15-110</b>	<b>\$370-740</b>	<b>\$370-740</b>

- **Investment Required:** No additional investment required<sup>4</sup>
- **Qualitative Benefits:**
  - Increased alumni engagement through stronger understanding of alumni base
  - Reduced time on data entry and correction
- **Resources Required:**
  - Advancement staff increased effort and focus on data collection, analysis, and reporting

## Risks and Dependencies

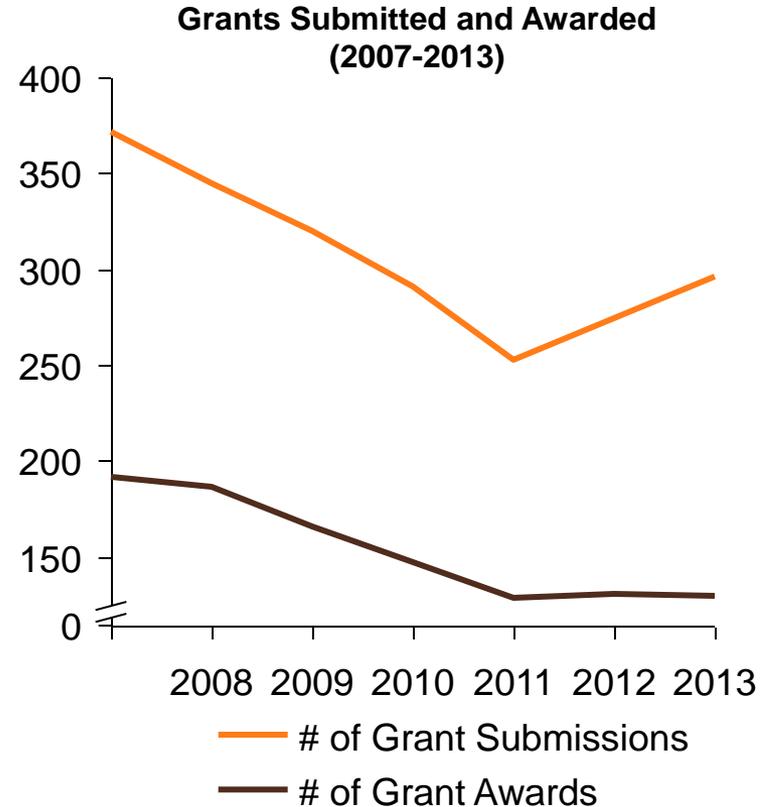
- Consistent alumni data is dependent upon implementation of a campus-wide CRM system

Note: 1. No benefits assumed from prospect research opportunity as effort is already in flight. 2. See Core Administration CRM opportunity 3. Only % of donations that are unrestricted or for student aid assumed as benefits 4. CRM investment captured within CRM opportunity.

## Case for Change

- BGSU faculty have expressed concern that the grants submissions process is time-consuming, paper-heavy, and duplicative, discouraging grant submissions
- BGSU efforts to increase grants activity have included providing grant writing support to faculty through internal programming and through the hiring of an external consultant as well as the implementation of a 3<sup>rd</sup> party automated system to alleviate data entry issues
- Following a 7 year decrease in the number of grants proposal submissions by an average of 9% per year, proposal submissions have increased an average of 8% in FY12 and FY13, but have not returned to previous levels
- Faculty is also concerned of a lack of communication between the pre and post award teams

## Supporting Detail



Project Summary		
<p><b>Annual Benefit:</b></p> <p>By Year 3 \$90-180K</p>	<ul style="list-style-type: none"> <li>• Review and redesign the grants management process to establish a seamless end-to-end process, driving increased employee satisfaction, higher levels of service to faculty, and encouraging increased submissions</li> <li>• Continue grant writing support for faculty to further encourage proposal submissions</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>

## Project Activities

- Assess pre and post award processes against sector leading practices to confirm where there is opportunity for process improvement
- Review and redesign pre and post award processes to establish a seamless, efficient, non-duplicative, faculty-friendly, end-to-end process
- Establish continuous improvement approaches to ensure processes continue to improve once initial effort is complete
- In addition to process redesign, continue the University's recent efforts to provide grant writing support to faculty, which seems to have increased submissions in the past 2 fiscal years

## Potential KPI Improvements

- 8-10% increased annual number of grants submissions
- Target at least 20%-40% cycle time reduction per pre and post award grants management process (public sector average is 40% - 60% cycle time reduction per process)

## Estimated Value

Costs and Benefits (In Thousands)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$0	\$90-180	\$90-180	\$90-180	\$90-180
Operating Cost	\$25	\$0	\$0	\$0	\$0
<b>Net Benefits</b>	<b>(\$25)</b>	<b>\$90-180</b>	<b>\$90-180</b>	<b>\$90-180</b>	<b>\$90-180</b>

- **Investment Required:** Investment in support resources may be required
- **Qualitative Benefits:**
  - Increased employee satisfaction
  - Higher levels of service to faculty
  - Increased submissions
- **Resources Required:**
  - Assistance from Strategic Initiatives in process redesign effort, as well as departmental support redesigning processes

## Risks and Dependencies

- Resistance from employees to change
- May uncover need for new systems or systems enhancement in order to realize efficiency gains

## **Executive Summary**

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## **The Path to Change**

## **Appendix**

## Case for Change

- Responsibility for coordinating and managing revenue generating events on campus lies in at least five separate places; as a result, pricing, vendors, and cost/revenue tracking varies across campus
- Some campus facilities (e.g., Wolfe and Levis Commons) are utilized primarily for campus-organized events with limited external use. This, along with parking limitations at BTSU, creates a gap in service for 250-1000 person events
- Peers have a significantly higher percentage of events generated by external parties
- Historically, limited summer program has prevented dining from reaching a profitable scale
- Conference and Event Services (C&ES) has delivered strong growth in the last year, but significant barriers prevent further growth

## Supporting Detail

### Capacity of Current Facilities Used for Events



0-250 Attendees



250-1000 Attendees



1000+ Attendees

*“We have this lovely, executive-level conference facility sitting empty in Levis Commons.”*

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$.28-.51M By Year 5 \$.50-1.09M	Increase the number of events on campus and the revenue per event by: <ul style="list-style-type: none"> <li>• Formalizing role of Conference and Events Services (C&amp;ES) department as the single coordinating point of contact for all events above a minimum threshold on campus</li> <li>• Expanding C&amp;ES access to include all facilities on campus, with a transparent scheduling process and priority usage for department “owner”</li> </ul>	

## Project Activities

- Identify list of facilities that are not currently open to host events
- Establish process for securing use of campus facilities for events, including;
  - Process and size threshold for engaging C&ES
  - Time in advance facility can be reserved
  - Reimbursement level for facility “owner”
  - Restrictions and staffing levels for specific facilities
- Work with existing event owners to transition management to C&ES as needed
- Determine where Levis Commons fits in to University portfolio (e.g., loss leader, revenue generator, or surplus property)
- Finalize in-progress universal contract with ITS

## Potential KPI Improvements

- Increase in total events and revenue per event
- One major, repeating event (500 pple, 5 weeks)
- 100% of potential facilities utilized to host events
- Dining profitability of 30% through increased scale

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.15-.25	\$.32-.56	\$.52-.95	\$.75-1.44	\$1.00-2.05
Operating Cost	\$.07-.11	\$.15-.26	\$.24-.44	\$.37-.69	\$.50-.96
<b>Net Benefits</b>	<b>\$.08-.14</b>	<b>\$.17-.30</b>	<b>\$.28-.51</b>	<b>\$.38-.75</b>	<b>\$.50-1.09</b>

- **Investment Required:** No additional investment.
- **Qualitative Benefits:** Reduced management time from departments, expanded BGSU brand with groups of high school students at camps
- **Resources Required:** Maintain current staffing levels within C&ES. Hire additional C&ES Specialist in Year 4 pending demand. Department staff time to support events (indirect salary costs not included in cost/benefit analysis)

## Risks and Dependencies

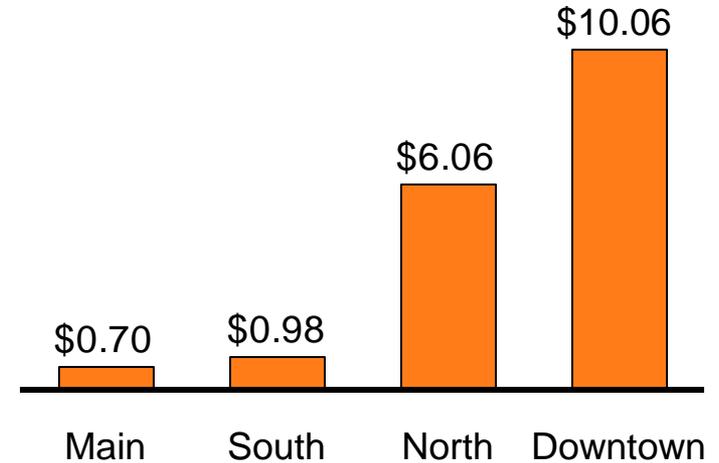
- Facilities continue to be staffed with required expertise during events
- Transparent scheduling/advance booking process to allow for long term conference planning

## Case for Change

- The University has ~60 “non-core” cars allocated across campus. Utilization is not tracked, but anecdotal experience suggests it is low and department cars are often left parked in critical service locations for extended periods of time
- BGSU groups spend ~\$240,000 on vehicle rentals and bus charters. Vehicles are sometimes rented despite availability on campus (e.g., golf carts)
- Several universities (e.g., Penn State, Michigan) have addressed this problem by centralizing vehicle pool and allowing departments to “rent” vehicles, while some innovative cities (Loveland CO and New York City) are utilizing car sharing technology to process ad hoc rentals
- Shuttle utilization varies by route. Low utilization means North/Downtown routes are significantly more costly per user (10x South/Main routes)

## Supporting Detail

Shuttle Route Cost per Ride (2012-3)



*“Some departments didn’t even know they had a car sitting on campus.”*

Project Summary		
<p><b>Annual Benefit:</b> By Year 3 \$288-549K</p>	<ul style="list-style-type: none"> <li>• Launch a vehicle sharing program with high quality vehicles available 24/7; reducing fleet size, promoting vehicle sharing, and reducing rentals when alternatives already exist on campus</li> <li>• Increase cost-effectiveness of campus shuttle by consolidating services on low-utilization routes and responding to community demand for access to Downtown route by sharing cost and service with city</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center;">●</p>

Source: BGSU data, peer websites, Accenture analysis

## Project Activities

- Review list of vehicles and classify as core / non
- Develop approach for core vehicles (keep current process or centralize and issue long term “leases”)
- Issue RFP for outside vendor to provide fleet management services and technology, including bringing car sharing program to campus
- Determine required number and mix of non core vehicles as well as pricing schedule for usage
- Auction surplus cars
- Evaluate potential benefit of hybrids/electric cars
- Identify vendor to provide on demand hospital rides in place of North Shuttle route
- Engage with city of Bowling Green to explore cost sharing for Downtown shuttle or shut down route

## Potential KPI Improvements

- Campus shuttle cost per ride under \$1.00
- Ability to measure and track fleet maintenance cost (*not calculated today*)
- Reduced department allocations for vehicle spend

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.32-.58	\$.32-.58	\$.32-.58	\$.32-.58	\$.32-.58
Operating Cost	\$.03	\$.03	\$.03	\$.03	\$.03
<b>Net Benefits</b>	<b>\$.29-.55</b>	<b>\$.29-.55</b>	<b>\$.29-.55</b>	<b>\$.29-.55</b>	<b>\$.29-.55</b>

- **Investment Required:** Potential investment required for management system. One time cash benefit of \$60,000-170,000 from selling excess vehicles could fund start up costs
- **Qualitative Benefits:** Increased access to vehicles across campus
- **Resources Required:** Centralized fleet manager (in house or contracted)

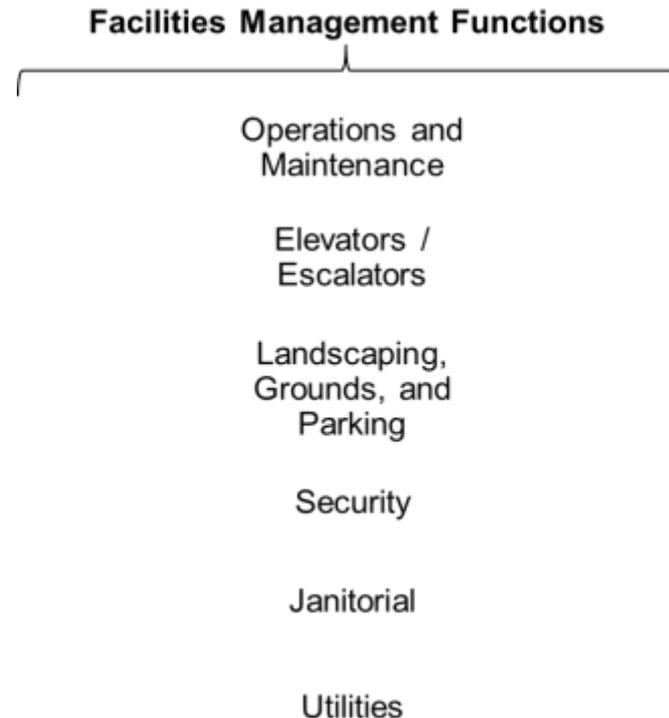
## Risks and Dependencies

- Appropriate number of cars kept in shared pool to ensure availability
- Students are able to access hospital through on demand services or car-sharing

## Case for Change

- At least four departments have responsibilities for maintaining campus facilities and provide varying levels of service
- With recent budget cuts, many facilities have not received adequate preventative maintenance, leading to \$500M in deferred maintenance
- There is limited transparency into the allocation of departmental financial contributions to facilities management. This creates challenges in budgeting and causes confusion when departments are asked to pay for additional services out of pocket
- When buildings are shared across departments, service charges are not always fairly allocated
- Some universities have contracted to secure custodial services across campus. Based on initial scan, BGSU spend is in line with peers

## Supporting Detail



Project Summary		
<p><b>Annual Benefit:</b></p> <p>By Year 3 \$352-561K</p> <p>By Year 5 \$402-650K</p>	<ul style="list-style-type: none"> <li>• Centralize responsibilities for facilities management across campus and create one set of policies and standards for buildings and grounds</li> <li>• Establish a customer-centric facilities management service that includes facility users in decision making, provides transparency into accounting/financial processes, and charges departments based on services provided</li> </ul>	<p><b>Feasibility Rating:</b></p> <p style="text-align: center; color: yellow; font-size: 2em;">●</p>

## Project Activities

- Confirm operational services to be centralized
- Identify complete listing of departments with operational duties and develop plan for transition
- Work with departments being impacted to identify high priority/business critical services and define appropriate service level agreements
- Engage campus to develop list of policies / standards for building maintenance and to define appropriate responsibility within Campus Ops
- Develop inclusive, consultative approach to annual FM budgeting and ongoing FM decision-making
- Review current listing of preventative maintenance services and identify additional services that are proven to produce a strong ROI
- Conduct due diligence on potential expansion of custodial / maintenance contract

### Potential KPI Improvements

- Reduced cost of facilities management per sq. foot
- Increased preventative maintenance spend
- Reduced spending on emergency repairs

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.19-.29	\$.28-.42	\$.41-.62	\$.44-.67	\$.48-.73
Operating Cost	\$.03	\$.03	\$.05	\$.05	\$.08
<b>Net Benefits</b>	<b>\$.17-.27</b>	<b>\$.25-.39</b>	<b>\$.35-.56</b>	<b>\$.39-.61</b>	<b>\$.40-.65</b>

- **Investment Required:** No additional investment for customer centric facilities management, ongoing investment in preventative maintenance as desired
- **Qualitative Benefits:** More informed FM budgeting process, increased satisfaction with campus facilities, greater levels of service
- **Resources Required:** Supervisory support for transitioned resources within Campus Operations

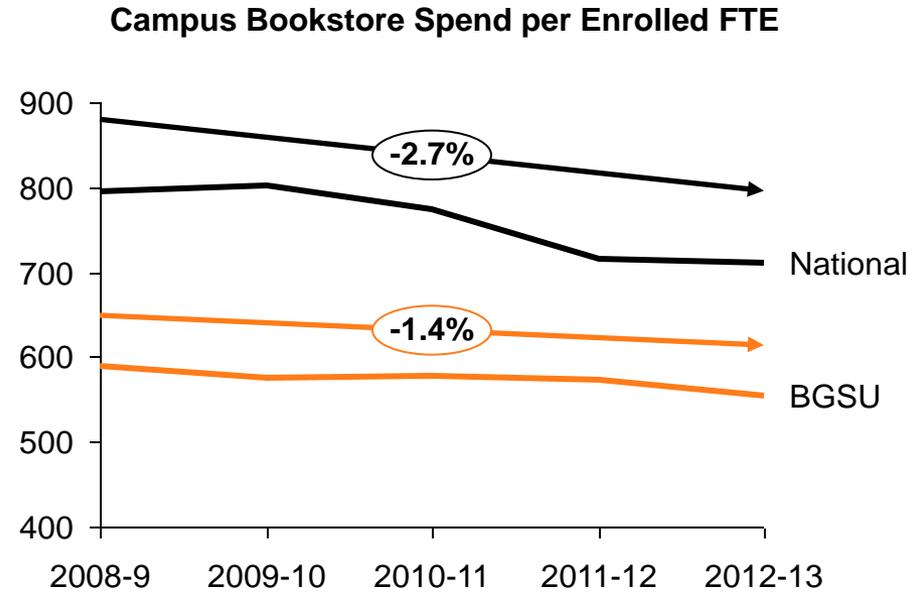
### Risks and Dependencies

- Initial degradation in quality of service for facilities transitioning to Campus Operations
- University accounting systems must be able to support facilities chargeback model

## Case for Change

- BGSU leadership currently spends time focused on operations of the bookstore, at times distracting from other mission-centric activities
- 13% of bookstore revenues come from the use of financial aid as a form of payment, compared to benchmark of 30%. Students report they are not aware of the option to pay with financial aid IOUs
- The BGSU stores have historically struggled compared to the market: generating 22% less revenue per enrolled FTE with a margin 2.1 percentage points below the national average.
- While the entire market has struggled, BGSU has seen less of a decline than its peers
- Small, specialty campus “stores” have been created to meet unique needs of certain populations (e.g., Colleges of Technology and Art)

## Supporting Detail



*“I have to wait until I receive my financial aid to buy books, which can take months.”*

Project Summary		
<b>Annual Benefit:</b> By Year 3 N/A By Year 5 N/A	Explore two options to get ahead of the declining bookstore market and position BGSU for the future <ul style="list-style-type: none"> <li>• Eliminate traditional bookstore and channel on campus sales through team shop, technology shop, and a pop up bookstore during enrollment rush. Develop robust online store and drive sales through that platform</li> <li>• Engage with a private provider to manage store on an ongoing basis</li> </ul>	<b>Feasibility Rating:</b> 

Source: Data from BGSU financial reports, National Association of College Stores, University Business, and IPEDS

## Project Activities

- Increase marketing of Financial Aid voucher system to all students on financial aid
- Consolidate small “shops” into bookstore network
- Pending decision about bookstore operations, sell excess inventory to partner or back to vendors
- Identify desired model for future bookstore:

Contract with a partner to manage bookstore

- A**
- Engage partner organizations to deepen understanding of financial implications
  - Gauge partner’s interest in continuing current contributions to University (e.g., scholarship)

OR

Consolidate physical footprint and expand virtual

- B**
- Expand number of items available at online store, affiliations with other online vendors, and campus marketing to drive students to the web
  - Develop model for pop up bookstore for one week a semester during rush periods
  - Transition inventory responsibility to Purchasing

## Potential KPI Improvements

- Bookstore spend per enrolled FTE
- Percent of bookstore sales from financial aid

## Estimated Value

Costs and Benefits (In Millions)		
Benefits	Contract	Consolidate / Virtual
Annual Revenue	\$\$.91-1.16	\$1.24-\$1.71
Operating Costs	\$.03	\$.44
<b>Annual Contribution</b>	<b>\$.89-1.14</b>	<b>\$.80-1.28</b>
<b>One Time Cash Boost</b>	<b>\$1.85</b>	<b>\$.93</b>

*Note: Bookstore opportunity analyzed as comparison of two potential options. No benefits calculated relative to current environment.*

- **Investment Required:** TBC – can fund through inventory sale
- **Qualitative Benefits:** Increased satisfaction with bookstore inventory, additional students purchasing books before start of semester
- **Resources Required:** Portion of administrative time to manage vendor, 40% of current staff to manage consolidated store

## Risks and Dependencies

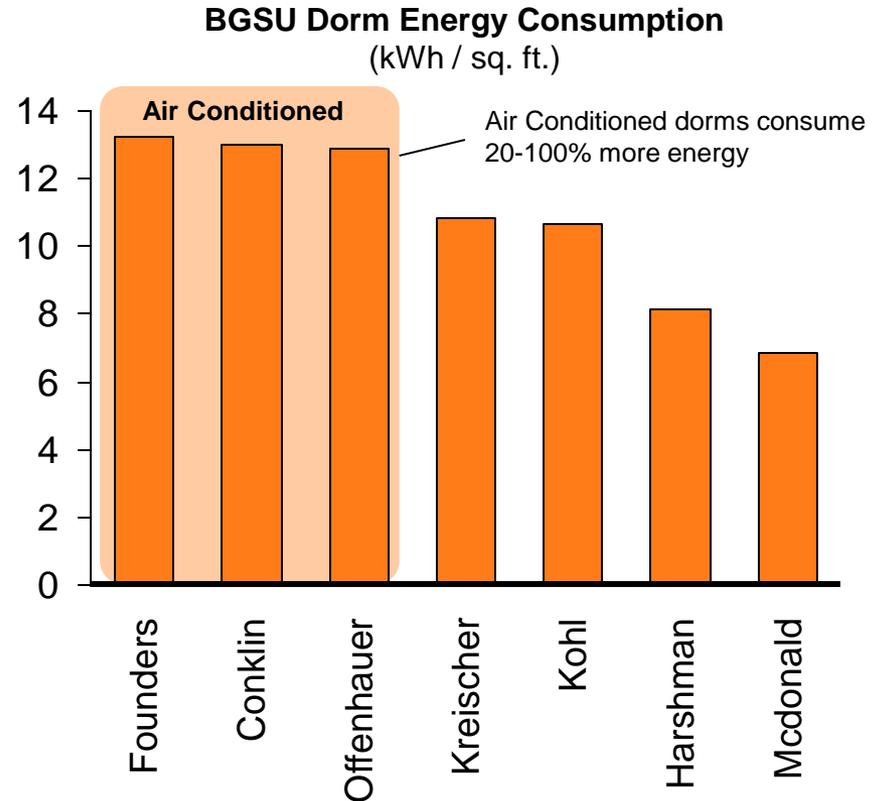
- Bookstore must continue to take financial aid payments regardless of sales model
- Reduction in revenue could cause partner to back out of contract or reduce revenue share

Note: Assumes \$8.2M in sales with same revenue distribution as today

## Case for Change

- The BGSU campus consumes ~89M kilowatt hours of electricity, at an average of 18.4 kWh per square foot. Usage varies significantly by building
- Anecdotal evidence suggests significant energy consumption during low usage periods (e.g., summer and winter breaks)
- Classrooms are used an average of 29 hours a week – significantly below Ohio Board of Regents target of 42 hours per week
- Initial rollout of energy conservation measures (ECM) has been successful, but still opportunity to increase savings and expand across campus
- There has not been a holistic “green” awareness campaign to provide transparency into energy usage across the BGSU campus
- BGSU recently hired an Energy Manager to focus on opportunities to reduce energy consumption

## Supporting Detail



Energy Management		Feasibility Rating:
<p><b>E</b></p> <p><b>Annual Benefit:</b></p> <p>By Year 3 \$.48-.80M</p> <p>By Year 5 \$.82-1.36M</p>	<ul style="list-style-type: none"> <li>• Establish standardized class schedule, including standard class times and full day scheduling, to increase utilization and reduce wasted energy</li> <li>• Expand initial wave of Energy Conservation Measures across campus</li> <li>• Launch Energy Awareness Campaign to encourage energy conservation and create sense of accountability for energy reductions</li> <li>• Reduce campus ops at low volume periods (e.g., holiday breaks, summer, etc.) – shift to four day workweek and/or close down underutilized space</li> </ul>	<p>●</p>

## Project Activities

- Develop and enforce standardized scheduling policy across campus to bring average classroom utilization to Ohio Board of Regents target
- Launch energy consumption transparency campaign across campus to create awareness around high and low performing facilities
- Conduct detailed review of first wave of ECMs (e.g., HVAC controls, energy efficient lighting, etc.) and identify measures that should be expanded to the remainder of campus
- Engage energy consumption experts to identify additional conservation measures that were not selected during 2008 study
- Develop standard temperature schedule for buildings on campus
- Reevaluate remaining recommendations from 2008 energy strategic plan

## Potential KPI Improvements

- Reduction in kWh/ sq. ft.
- Increase in classroom utilization to Ohio Board of Regents target of 42%

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.16-.27	\$.30-.50	\$.48-.80	\$.67-1.11	\$.82-1.36
Operating Cost	\$.02	TBC	TBC	TBC	TBC
<b>Net Benefits</b>	<b>\$.14-.25</b>	<b>\$.30-.50</b>	<b>\$.48-.80</b>	<b>\$.67-1.11</b>	<b>\$.82-1.36</b>

*Note: Additional Operating Costs and Investment Required may be identified during next phase of analysis*

- **Investment Required:** No investment for policy and awareness changes. Potential significant investment in ECMs pending detailed study
- **Qualitative Benefits:** Enhanced “green” branding increases attractiveness to prospective students
- **Resources Required:** Continued support for BGSU Energy Manager

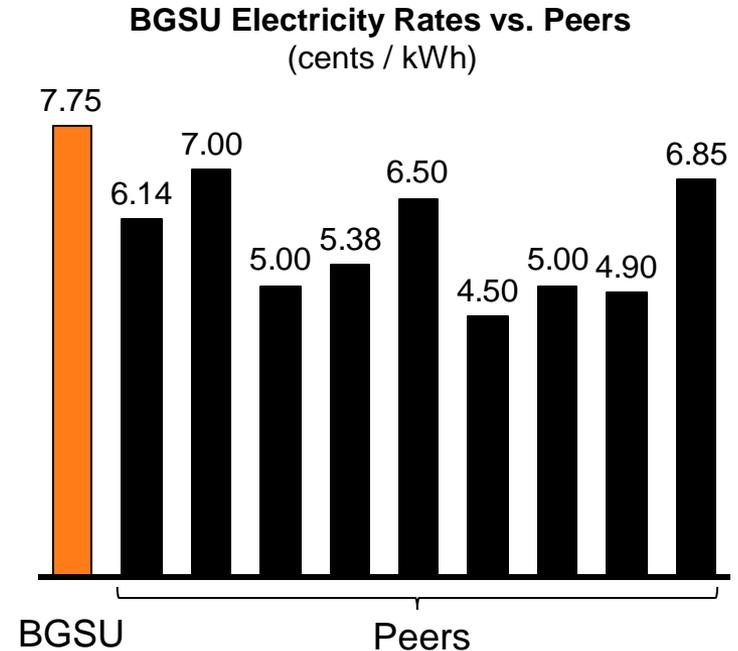
## Risks and Dependencies

- Increase in utilization requires availability of appropriate classroom types
- Achieving savings requires decommissioning of buildings

## Case for Change

- BGSU currently pays a rate of 7.75 cents per kWh for electricity. Ohio peers pay between 4.90 and 7.00 cents / kWh. Reducing rate to average of peer set would result in annual savings of ~\$2.3M.
- BGSU has begun to explore alternative options to paying municipality electricity rate such as on site generation of electricity but such efforts are in the early stages
- BGSU has agreed to participate in a demand response program to shed energy during peak times, but lacks the appropriate demand limiting functions to respond accordingly

## Supporting Detail



Energy Rates		Feasibility Rating:
<b>F Annual Benefit:</b> By Year 3 \$1.08-1.70M By Year 5 \$1.08-1.82M	<ul style="list-style-type: none"> <li>• Establish demand limiting function for electricity to avoid peak charges</li> <li>• Continue to explore cogeneration feasibility, with particular focus on creative financing options that don't require significant capital investment</li> <li>• Engage city in discussions around creative solutions to the high rates charged for electricity</li> </ul>	

## Project Activities

- Develop plan to expand participation in demand response program and establish formal demand limiting function, including components for:
  - Load balancing - reduce peak demand by balancing use (e.g., turn on stadium lights one at a time rather than all at once)
  - Load shedding – reduce electricity consumption from grid during high demand (e.g., transition to generator power during peak periods)
- Continue to explore cogeneration options (geothermal, solar, etc.) and creative financing opportunities (e.g., power purchase agreements, cost sharing with city)
- Reengage municipality in discussions around opportunities to achieve a more equitable electricity rate

## Potential KPI Improvements

- Percent of energy generated on campus
- Reduced peak energy demand
- Reduced energy cost per kWh

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.23-.35	\$.46-.70	\$1.08-1.82	\$1.08-1.82	\$1.08-1.82
Operating Cost	\$0.06	\$0.06	\$0.03	TBC	TBC
<b>Net Benefits</b>	<b>\$.23-.30</b>	<b>\$.46-.65</b>	<b>\$1.08-1.79</b>	<b>\$1.08-1.82</b>	<b>\$1.08-1.82</b>

*Note: Additional Operating Costs and Investment Required may be identified during next phase of analysis*

- **Investment Required:** Significant investment required in cogeneration. Utilize initial savings from demand response project to fund investments in additional load shedding capabilities
- **Qualitative Benefits:** Enhanced “green” branding increases attractiveness to prospective students
- **Resources Required:** Continued support for energy manager (included in Operating Cost)

## Risks and Dependencies

- Willingness of city to adjust electricity pricing
- Demand response requires ability to shed up to 4 kw of electricity during peak times

## **Executive Summary**

## **Summary of Opportunities**

### **Opportunity Charters**

- Organization & Benefits
- Student & Student Services
- Core Administration
- Research & Advancement
- Auxiliary Operations & Facilities
- Education Platform
- Low Focus and In-Flight Opportunity Areas

## **The Path to Change**

## **Appendix**

## Case for Change

- BGSU already focuses on growing high focus programs (those with strong credentials whose graduates face strong job outlooks) through its Centers of Excellence, with one example being the 21<sup>st</sup> Century Educator Preparation Initiative:
  - Specifically focus on STEM teachers
  - STEM jobs are in demand, national goal of recruiting 100,000 STEM teachers by 2020 and programs are receiving funding from sources like Woodrow Wilson; National Science Foundation
- Partnerships with peers:** BGSU has experience in partnerships with peers to deliver programs (e.g. Master of Public Health). Peers' offerings can compliment BGSU (e.g. BGSU's Engineering Tech and UT's Engineering)

## Supporting Detail

### Example universities with shared course offerings

Universities	Program
University of North Carolina at Chapel Hill and North Carolina State University	UNC medical school partnership with NCSU's engineering school
Indiana University of Pennsylvania, Bloomsburg, and Kutztown Universities	Audiology and speech pathology
UNC and Duke University	German Studies programs

*“Qualified STEM teachers are crucial to developing the talent that employers want to hire.”*

Project Summary		Feasibility Rating:
<b>Annual Benefit:</b> By Year 3 \$0.46-0.72M By Year 5 \$1.18-1.82M	<ul style="list-style-type: none"> <li>Strengthen high growth programs. As examples, BGSU can:</li> <li>Leverage reputation in Education to become a leader in educating STEM teachers, spear heading a “zero cost path to become a STEM educator” initiative through external funding</li> <li>Explore partnerships with local peers, such as UT, to share offerings for high focus majors that need additional specialized offerings</li> </ul>	 Internal Programs    Peer Partners

## Project Activities

- Identify and validate BGSU's high focus programs
- Develop partnership opportunities to provide zero cost degrees for students committed to becoming STEM teachers
  - Identify funding opportunities from the State or other existing or new external funding sources
  - Formalize partnerships with school districts in career fairs to become premier provider of STEM teachers
- Identify local peers with offerings that can boost BGSU's high focus programs (e.g. Partner with UT for Engineering classes for applicable programs)
- If high focused offerings increase undergraduate and graduate enrollment by 1%-1.5%, it results in additional revenue of \$1.18-1.82M

## KPI Improvements

- Increased enrollment in high focus programs
- Improved program ranking in high focus areas

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.16-.16	\$.32-.32	\$.72-1.04	\$1.20-1.84	\$1.60-2.41
Operating Cost	\$.15-.15	\$.21-.21	\$.26-.32	\$.37-.48	\$.42-.59
<b>Net Benefits</b>	<b>\$.01-.01</b>	<b>\$.11-.11</b>	<b>\$.46-.72</b>	<b>\$.83-1.36</b>	<b>\$1.18-1.82</b>

- **Investment Required:** No investment is required
- **Qualitative Benefits:** Become regional leader in producing STEM teachers, increased student satisfaction with programming
- **Resources Required:** Committee to develop funding strategy, committee to develop and oversee partnerships with peers

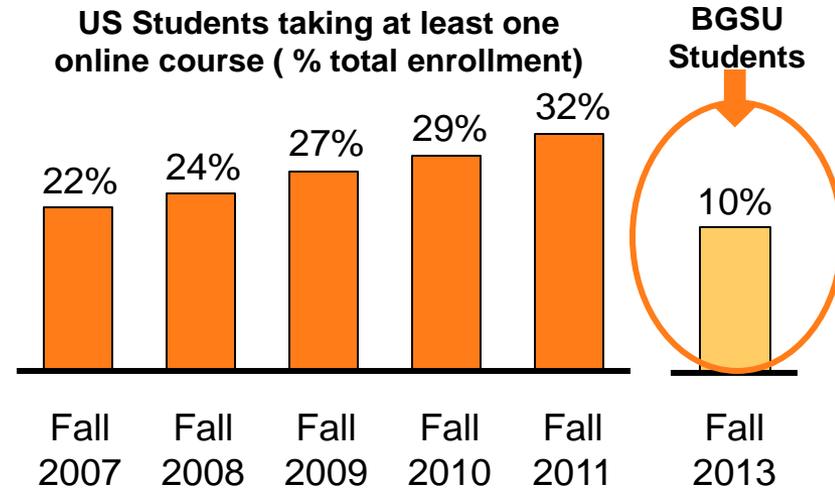
## Risks and Dependencies

- Developing partnership with other institutions is key. Also, student administration & registration across institutions needs to be seamless
- Changes in offerings for education majors can affect BGSU's ability to compete for qualified students

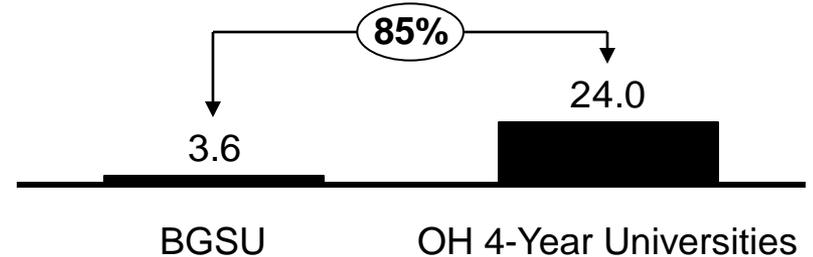
## Case for Change

- While BGSU was recognized by OH for online excellence, the Graduate Education program trails Wright State in US News rankings
- Student interviews point to strong interest in online courses despite general lack of knowledge that online courses were available for credit
- ~22% of Ohio residents have “some college”
- **Online Courses:** Enrollment in online courses has skyrocketed, 33% of college students were enrolled in an least 1 online course in 2011. However, BGSU lags behind with roughly 10% of students taking at least 1 online course in 2013
- **Online Programs:** BGSU performance has been mixed. Between Fall '12- Fall '13: FTE undergraduate students enrolled in fully online programs grew by 14%, graduate student enrollment decreased by 3%

## Supporting Detail



% Total Enrollment from Online Programs , 2013



### Annual Benefit:

By Year 3  
\$.45-1.51M

By Year 5  
\$.89-3.2M

### Project Summary

- Actively develop and encourage online offerings as a way to gain academic credits to increase flexible paths for students to succeed in earning their degree
- Develop flexible, self paced, year round full online offerings for students to increase enrollment by better supporting the needs of a changing market

### Feasibility Rating:



## Project Activities

- Identify quick levers to increase online enrollment
- Create communication plan to promote online ed.
- Create an easy registration path for online certificate and non-degree courses. Current offerings are listed across different dept. sites
- Assess online credit requirements to create lifelong learners and help students graduate timely
- Determine ways to differentiate BGSU's online ed.
- Evaluate feasibility of more flexible fully online offerings. New programs can start any time of the year and be self-paced (e.g. UW Flexible Option)
- Explore online credentials to certify proficiency
- Assumes initiatives can keep/increase growth rate across online programs to the point that enrollment doubles within 5 years

## Potential KPI Improvements

- Increased % of traditional students that enroll in online courses
- Increased enrollment in fully online programs

## Estimated Value

Costs and Benefits (In Millions)					
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Benefits	\$.23-.63	\$.43-1.25	\$.64-2.03	\$.86-2.98	\$1.09-4.16
Operating Cost	\$.08-.19	\$.14-.35	\$.19-.51	\$.20-.69	\$.20-.96
<b>Net Benefits</b>	<b>\$.15-.44</b>	<b>\$.29-.90</b>	<b>\$.45-1.51</b>	<b>\$.66-2.29</b>	<b>\$.89-3.20</b>

- **Investment Required:** No investment is required
- **Qualitative Benefits:** Increased student satisfaction and enrollment due to flexible offerings
- **Resources Required:** Faculty engagement is necessary to incentivize and develop additional online offerings

## Risks and Dependencies

- Growing online offerings can create strong competition for BGSU
- A cultural shift will be necessary as faculty embrace effective online teaching in addition to traditional teaching methods

## **Executive Summary**

## **Summary of Opportunities**

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- Low Focus and In-Flight Opportunity Areas

## **The Path to Change**

## **Appendix**

***The below opportunities may provide some, but not significant, potential financial benefits , require additional study from a specialized consultant, or were disqualified as potential opportunities.***

## Student Services

Opportunity	Supporting Detail	Description of Opportunity	Rationale
<b>Streamline Student Programming</b>	<ul style="list-style-type: none"> <li>Students have a wide variety of co-curricular events to attend, attendance rates vary. An initial review shows that 12/51 events in 2011-2012 had an attendance of &lt; 20 students</li> <li>Interviews point to students being overwhelmed by too much programming</li> </ul>	<ul style="list-style-type: none"> <li>A review of programming can help ensure efficient allocation of funds E.g. Consider prior or potential attendance levels and audience interest, and scheduling conflicts (minimal programming during exams) to avoid low attendance</li> </ul>	<p><b>Low Focus</b></p> <ul style="list-style-type: none"> <li>Limited financial benefits given size of overall spend</li> </ul>
<b>Multi-Semester Registration</b>	<ul style="list-style-type: none"> <li>Multi-semester registration encourages long term planning for graduation and can provide data on upcoming course demand</li> <li>Interviews with staff point to support of multi-semester registration</li> <li>Multi-semester registration examples: Cleveland State Univ., Univ. of Central Florida and Florida International Univ.</li> </ul>	<ul style="list-style-type: none"> <li>Implement multi-semester registration to create administrative efficiencies and assist students with long term planning</li> <li>May consider multi-semester registration for specific groups (e.g. students with a minimum GPA or in certain programs)</li> </ul>	<p><b>Low Focus</b></p> <ul style="list-style-type: none"> <li>Previously evaluated by BGSU</li> </ul>
<b>Expand 3 Year Bachelors, create 2 Year Option</b>	<ul style="list-style-type: none"> <li>Ohio's PSEO program allows 9-12<sup>th</sup> graders to earn college credit through funding from the OH General Assembly</li> <li>In FY2012, ~16,000 students participated, ~456 students did so through BGSU</li> <li>OBR requires colleges to have a 3 year degree for 60% of programs by 2014</li> <li>3 Year degrees can lower tuition and opportunity costs for students</li> </ul>	<ul style="list-style-type: none"> <li>Develop strategy to grow dually enrolled high school students</li> <li>Establish clear pathway for early graduation and ensure students have access to necessary courses</li> <li>Expand flexible offerings (online and weekend courses) to further reduce time fully enrolled at BGSU to 2 years</li> </ul>	<p><b>Low Focus</b></p> <ul style="list-style-type: none"> <li>BGSU is already compliant with 3 Year Bachelors requirement</li> </ul>

***The below opportunities may provide some, but not significant, potential financial benefits or were disqualified as potential opportunities.***

## Research and Advancement

Opportunity	Supporting Detail	Description of Opportunity	Rationale
<b>Rationalize Patent Process</b>	<ul style="list-style-type: none"> <li>BGSU pays a total of \$56K a year in patent fees</li> <li>Of the total patent fees, there is current effort to commercialize research with total annual fees of \$19K</li> <li>The process for approving which patents should be pursued at BGSU is ineffective due to a lack of expertise in determining the viability of patent commercialization and a poor incentive structure as the patent fees are not paid from the approving committee's budget</li> </ul>	<ul style="list-style-type: none"> <li>The patent process should be reviewed to ensure an effective incentive structure is in place and that training is provided to the committee to allow the members to better judge the viability of patent commercialization</li> <li>If research at BGSU grows in the future, it will be particularly important to ensure the patent process is improved</li> </ul>	<p><b>Low Focus</b></p> <ul style="list-style-type: none"> <li>The current financial benefit from a reduction in patent fees is not significant</li> </ul>

***The below opportunities may provide some, but not significant, potential financial benefits or were disqualified as potential opportunities.***

## Auxiliary Operations and Facilities

Opportunity	Supporting Detail	Description of Opportunity	Rationale
<b>BGSU Golf Course</b>	<ul style="list-style-type: none"> <li>BGSU spends ~\$70K annually on golf course</li> <li>Despite its prime location on campus, the short course distance and lack of a clubhouse make it challenging to generate significant usage</li> </ul>	<ul style="list-style-type: none"> <li>Identify partner organization interested in taking over day to day management of golf course, reducing operating spend required from BGSU to \$0</li> <li>Work with partner to build clubhouse on site to host events and increase revenue potential</li> </ul>	<p><b>Low Focus</b></p> <ul style="list-style-type: none"> <li>Limited financial benefits given size of overall spend</li> </ul>
<b>Explore Efficiencies at WBGU</b>	<ul style="list-style-type: none"> <li>BGSU funds ~30% of WBGU operating costs, a total of ~\$900,000 annually</li> <li>WBGU provides hands on experience for 56 BGSU students</li> <li>Given small scale, cost of fundraising is high</li> </ul>	<ul style="list-style-type: none"> <li>Understand costs/benefits of various options related to the future of WBGU</li> <li>Explore partnership with WGTE Toledo to more cost effectively serve the Lima market while also providing internship opportunities to BGSU students</li> </ul>	<p><b>Requires Specialized Consultant</b></p> <ul style="list-style-type: none"> <li>Recommended that BGSU undertake a robust cost/benefit analysis with a contractor qualified in public broadcasting</li> </ul>
<b>Right-size Athletic Programming</b>	<ul style="list-style-type: none"> <li>BGSU spends ~\$19M to fund 18 intercollegiate athletics teams. ~\$13M of this funding comes from student general fees</li> <li>Initial scan of MAC peers indicates that number of sports and cost per sport are in line or below peer institutions</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<p><b>Limited Opportunity</b></p> <ul style="list-style-type: none"> <li>BGSU athletics spend is below MAC average</li> </ul>

***Accenture has focused on analyzing opportunities that have yet to launch, as opposed to the multiple in-flight opportunities with likely significant contributions to BGSU's financial position, a selection of which are listed below.***

Opportunity Area	Description	Details
ITS	Outsource Data Center	Contracted with Expedient in Columbus for disaster recovery and data centers, getting rid of small data closets in departments at BG
ITS	Improve Website	Improving the website through the implementation of Adobe Cloud and getting rid of self-hosted, unsearchable pages. By Nov 15, set up an area for Depts. to choose a template and set up one of their 44,000 pages. Institutes responsive design to have webpages fit to devices
ITS	Student Time System	Student time clock off Kronos and onto PeopleSoft, tracked by swiping BG1 card to be activated next month
ITS	Student Advising Improvements	EAB predictive analysis of retention and FACES for better career counseling
ITS	Renegotiate Printing Contract	PLANNED: Re-negotiate printing contract to save \$750k
HR	Recruiting and Tenure Process	Hire Touch planned for this year as well as the U of C tenure process
Education Platform	Enrollment Growth Strategies	Noel Levitz' recommendations to grow enrollment include creating plans for marketing, data-driven recruitment, and admissions' processes upgrades
Education Platform	Tuition Discounting	BGSU's can modify its tuition discounting and remain competitive. Noel Levitz is conducting a more in-depth study due to the extent of the benefits
Events	Universal Contract	Continue to support development of online universal contract for C&ES
Facilities Mgmt.	Recreational Wellness Transition	Continue to move forward with transition of Rec Wellness facilities management responsibilities to Campus Operations

## **Executive Summary**

## **Summary of Opportunities**

## **Opportunity Charters**

## **The Path to Change**

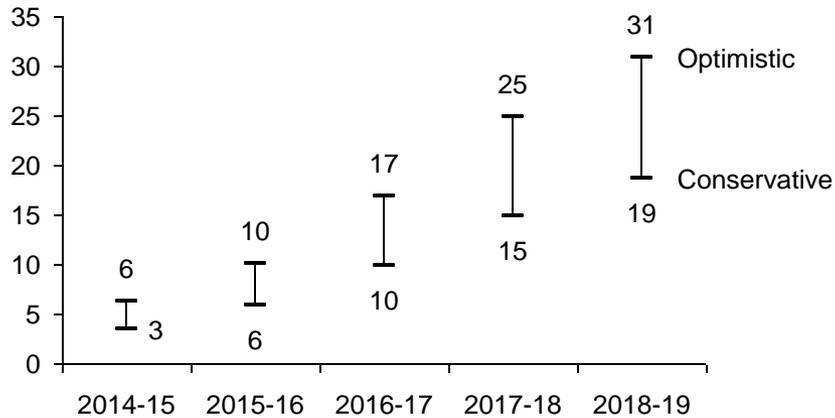
- Timing & Benefits
- Program Management & Governance

## **Appendix**

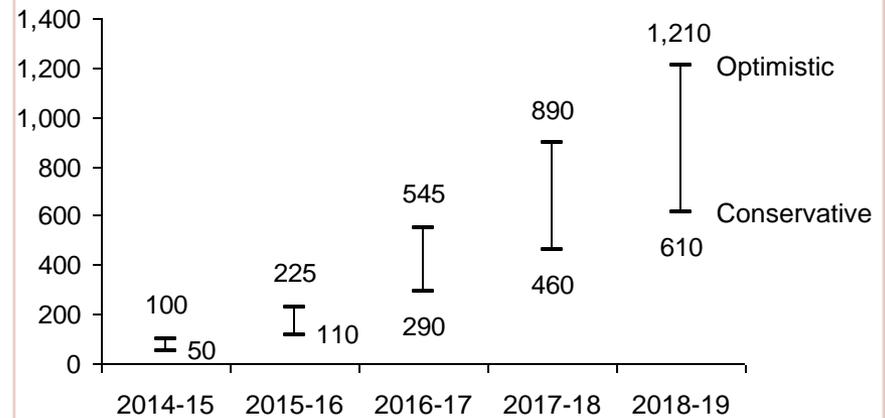
# Anticipated Benefit from Opportunities

**The 22 opportunities identified are estimated to deliver between ≈\$53-90M in net benefit and ≈ 1,500-3,000 new students over five years. Executing on these opportunities would require the dedication of up to 12 BGSU FTEs and investment of ≈\$9-13M.**

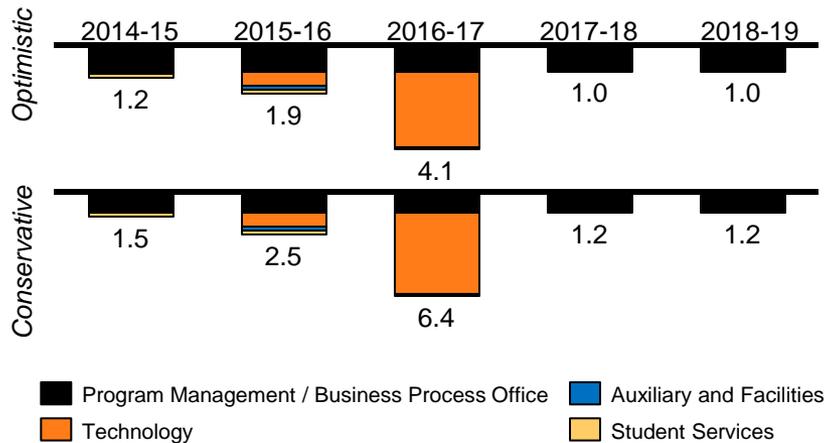
**Annual Net Operating Benefit, \$M**



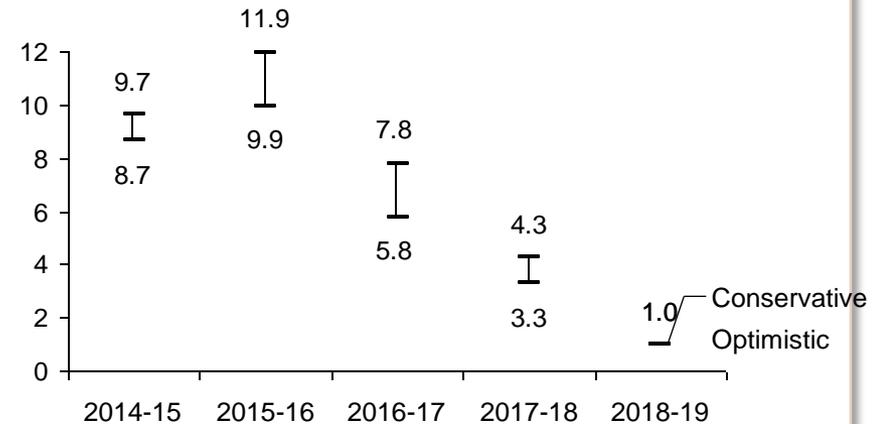
**Annual Enrollment Growth, Student FTE**



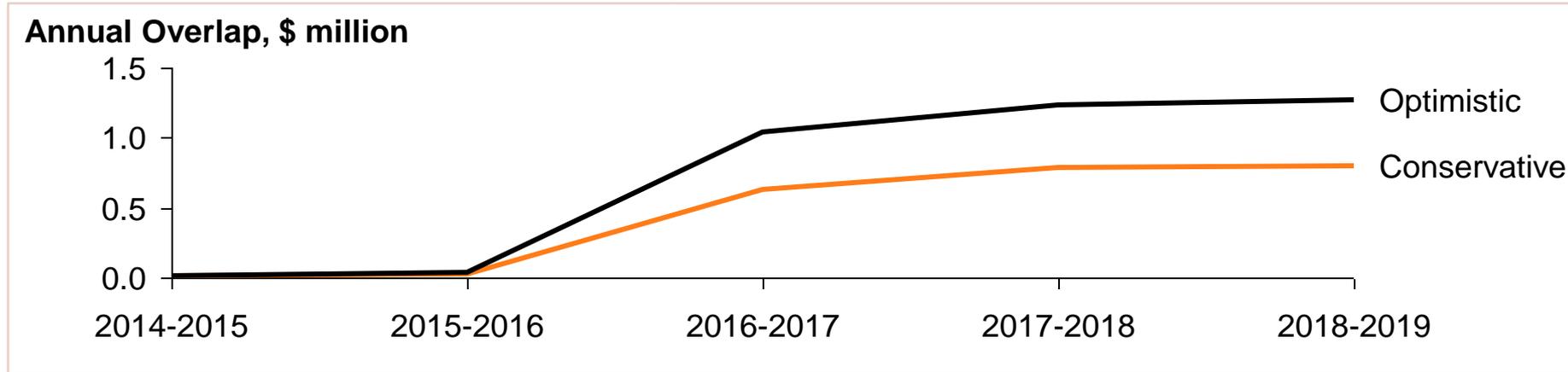
**Annual Investment Required, \$M**



**BGSU Project Resources, FTE Effort**

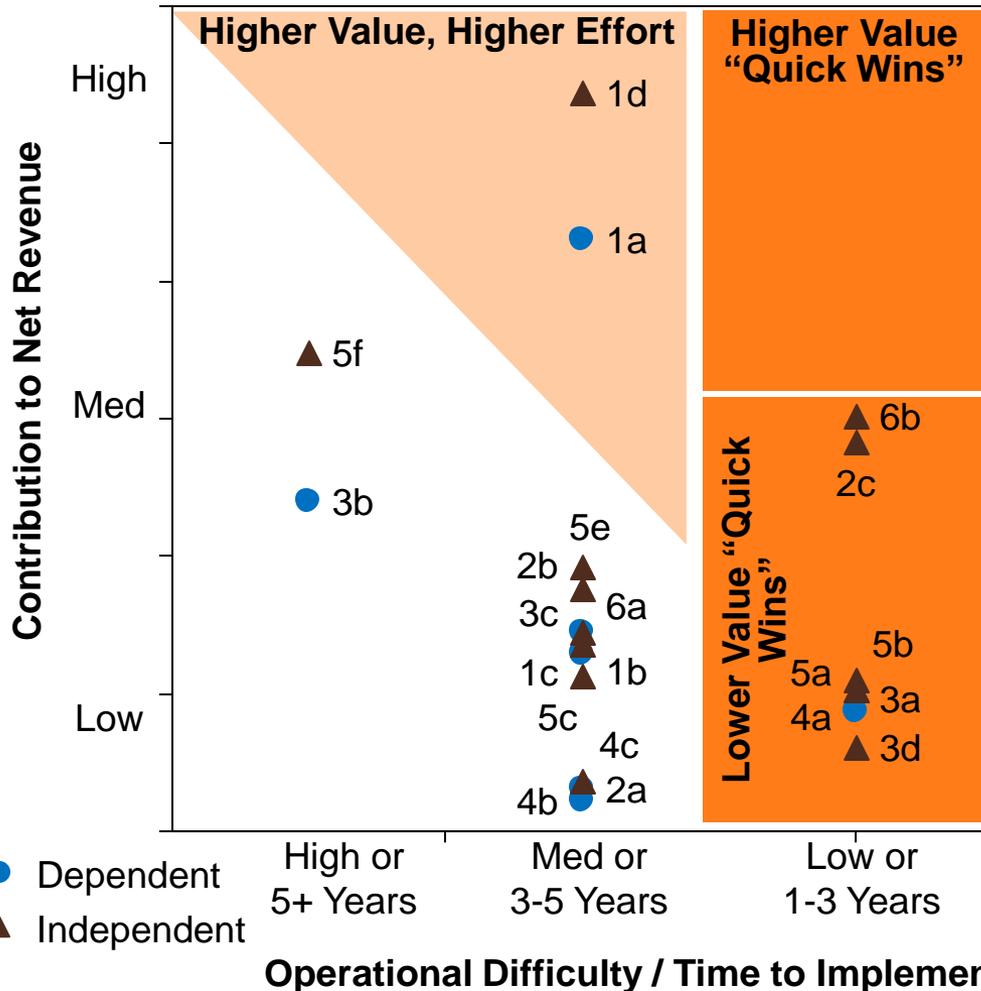


**Benefit from individual opportunities was calculated as if it were to be implemented in isolation. In a number of cases, implementation of the package of opportunities would result in benefits overlap of \$800K-\$1.26M by year 5. The consolidated financial calculations have removed this overlap.**



Overlap	Explanation
<b>Fee Waivers</b>	Reducing fee waiver benefits reduces overall benefits cost per employee. Result is reduced benefits from positions that are not replaced during other initiatives. Overlap is a small portion of employee savings and was not calculated
<b>Student Services Process Improvements</b>	Business Process Redesign (BPR) benefits (1C) includes processes that would be redesigned as part of collocation (2A)
<b>Fleet and Travel Benefits</b>	Assumes no overlap between fleet reduction and benefits from purchasing/travel initiative. Additionally, although not calculated, if employee population was reduced significantly as a result of all other initiatives, fleet could potentially be further reduced.
<b>CRM and IT Redesign</b>	Combining current CRM systems would deliver same benefits as a portion of the IT redesign program
<b>Electricity Savings</b>	Electricity savings from 3D (IT electricity usage) and 5E reduce potential cost savings from lower rates

**BGSU has worked to achieve benefit in some of the more obvious, higher value areas, leaving the biggest opportunity in areas that require more effort.**



## Opportunities Explored:

- 1a. Span of Control Improvement
- 1b. Fee Waiver Sustainability
- 1c. Non-Core Process Redesign
- 1d. General Education Offering Review
- 2a. Co-located Student Services
- 2b. Career and Internship Collaboration
- 2c. Tailor Programs for Nontraditional
- 3a. Spending/Collection Redesign
- 3b. Key Administrative Redesign
- 3c. SaaS CRM and ERP Systems
- 3d. Rationalize Computer Labs
- 4a. Advancement Admin Centralization
- 4b. Alumni Data Management/Analytics
- 4c. Streamlined Grants Management
- 5a. Conference and Event Services
- 5b. Fleet Management
- 5c. Customer-Centric Facilities Mgmt.
- 5d. BGSU Bookstore of the Future
- 5e. Energy Management
- 5f. Energy Rates
- 6a. Strengthen High Focus Programs
- 6b. Leverage Online Education

Note: Bookstore (5d) benefits not calculated and not included in table

Notes: "Contribution to Net Revenue" is based on optimistic annual contribution achievable for Year 3

# Suggested High Level Roadmap

	Year 0 01/2014 -06/2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018	FY 2018-2019
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**Organization, Employee and Benefits**

- 1a. Improve span of control
- 1b. Improve sustainability of tuition fee waiver policy
- 1c. Redesign non-core business processes
- 1d. Rationalize general education offerings

**Student & Student Services**

- 2a. Create co-located student services
- 2b. Promote collaboration in internship and job placement
- 2c. Tailor programs to nontraditional students' needs

**Core Administration**

- 3a. Redesign key collection policies
- 3a. Redesign key spending policies
- 3a. Redesign key admin processes: Firelands, IT
- 3b. Admin processes: Finance, Procurement, HR
- 3c. Password self-service
- 3c. BGSU SaaS CRM
- 3c. SaaS ERP
- 3d. Rationalize computer labs

**Research and Advancement**

- 4a. Centralize University advancement administration
- 4b. Improve alumni data mgmt. and analytics: survey alumni
- 4b. System enabled analytics
- 4c. Streamline grants management process

**Auxiliary Operations and Facilities**

- 5a. Conference and event services
- 5b. Fleet management
- 5c. Customer centric facilities management
- 5d. BGSU bookstore of the future
- 5e. Energy mgmt.: utilization/awareness
- 5e. Energy conservation measures
- 5f. Energy rates

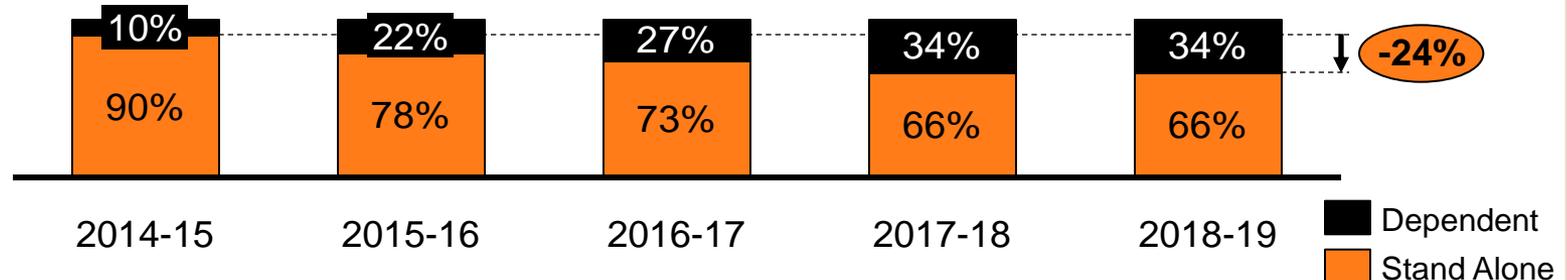
**Education Platform**

- 6a. Strengthen high focus programs
- 6b. Leverage online education to serve a broad student mix

***There are a number of opportunities which are largely independent of others. These stand alone opportunities can be launched earlier and therefore comprise a greater portion of the benefits identified for the initial years of the program.***

Opportunity Area	Initiatives
Organization, Employees, and Benefits	<ul style="list-style-type: none"> <li>1b. Tuition fee waivers</li> <li>1d. Rationalize general-education offerings</li> </ul>
Student and Student Services	<ul style="list-style-type: none"> <li>2b. Promote collaboration in internship and job placement</li> <li>2c. Tailor programs to non-traditional students' needs</li> </ul>
Core Administration	<ul style="list-style-type: none"> <li>3c. Password self service only</li> <li>3d. Rationalize computer labs</li> </ul>
Research and Advancement	<ul style="list-style-type: none"> <li>4a. Centralize advancement (minus small CRM-driven component)</li> <li>4b. Alumni survey only</li> <li>4c. Streamline grants process</li> </ul>
Auxiliary Ops & Facilities	<ul style="list-style-type: none"> <li>All initiatives could be executed independently</li> </ul>
Education Platform	<ul style="list-style-type: none"> <li>All initiatives could be executed independently</li> </ul>

**Benefits from stand alone vs. dependent, % of total optimistic opportunity**



**Timing of the following activities considers dependencies, or actions that must be undertaken, before the initiative can be successful:**

	Year 0 01/2014 -06/2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018	FY 2018-2019
Organization, Employee, and Benefits	1a. Improve span of control					
		1c. Redesign non-core business processes				
Student & Student Svcs		2a. Create co-located student services				
Core Administration	3a. Redesign key collection policies		3a. Redesign key spending policies			
		3b. Redesign key admin processes: Firelands, IT			3b. Admin processes: Finance, Procurement, HR	
	3c. Password self-service	3c. BGSU SaaS CRM		3c. SaaS ERP		
Research and Advancement	4a. Centralize University advancement administration					
	4b. Improve alumni data mgmt and analytics: Survey Alumni			4b. System Enabled Analytics		

### Explanation of dependencies:

- The size and scope of the 22 initiatives identified at BGSU mean that there is a natural connection between some of the initiatives. These connections have been identified and the initiatives sequenced accordingly to account for inter-dependencies.
- Some of the dependencies identified include:
  - Two initiatives may need to happen at the same time to improve the success of both (e.g., redesigning processes must be undertaken in conjunction with the CRM implementation to maximize benefits)
  - Some initiatives may require another initiative to be completed before they are started (e.g., collocating student services will not be possible until a location, such as the 2<sup>nd</sup> floor of the current BGSU bookstore, is finalized)
  - Some initiatives may be able to be started, but cannot be completed without activities from another initiative (e.g., centralizing advancement can begin but can only reach completion once the ERP is implemented)

**Executive Summary**

**Summary of Opportunities**

**Opportunity Charters**

**The Path to Change**

- Timing & Benefits
- Program Management & Governance

**Appendix**

***Program management (Working Groups) and governance (Steering Committee) should be formed within the first mobilization phase, to ensure all projects are coordinated and that stakeholder input is fully integrated into the process from the beginning.***

## Program Management (Working Groups)

## Successful Implementation

## Program Governance (Steering Committee)

### Purpose:

- Ensures all projects are executed on time and with adequate resources, to **achieve the program's objectives and benefits**

### Functions:

- Provides centralized, coordinated **execution management** of all projects
- Manages delivery, performance, resource allocation, issues, and value realization

### Benefits:

- Enables all projects to be completed in a **timely** manner, **within budget**, **achieving the full value** of the opportunity **without sacrificing quality**

**Meets:** Weekly with project managers,  
Monthly with Steering Committee

### Purpose:

- Program governance ensures the input and **expertise of all impacted stakeholders is integrated** into the decision-making process

### Functions:

- Provides strategic **oversight and direction**, prioritizes opportunities, monitors performance, and manages scope

### Benefits:

- Ensures the program's **direction, scope, and priorities are clear** and **communication** between stakeholders and the program remains strong

**Meets:** Monthly, or as needed

***Centralized program management is fully accountable for the end-to-end execution of all projects, including planning, resource mobilization, performance and budget.***

## **Delivery Management**

- Develop program work plan, ensuring timeline and dependencies of all individual projects are clear
- Track progress of all projects against program work plan

## **Resource Management**

- Ensure appropriately skilled personnel are available to projects at the appropriate times by centrally forecasting needs, tracking assignment of project personnel, and managing changes to resource needs
- Retain external contractors for short-term efforts that require large time commitment and/or fill a gap in University skills/capabilities

## **Performance Management**

- Collect and distribute data on the operational status of all projects to stakeholders and the steering committee
- Review performance reports to detect potential problems and mitigate risks

## **Issue Management**

- Resolve operational issues that have been escalated by project managers
- Prioritize and escalate issues to leadership or Steering Committee as needed

## **Value Management**

- Manage and produce cohesive financial planning and reporting for all projects
- Track realization of both financial and non-financial business benefits to ensure these benefits are measured and achieved

***Program governance provides strategic oversight, prioritizes opportunities, manages scope, monitors performance, and provides stakeholder feedback.***

## Strategy Setting

- Define the long-term goals and strategic direction of the program for BGSU
- Ensure projects remain aligned with BGSU's strategic priorities and advance the University's mission

## Stakeholder Input

- Advise University leadership on which opportunities should be pursued
- Review, prioritize, and approve investment required to complete projects
- Clearly define and integrate all stakeholders into the governance process
- Stakeholders voice input and concerns throughout implementation of projects

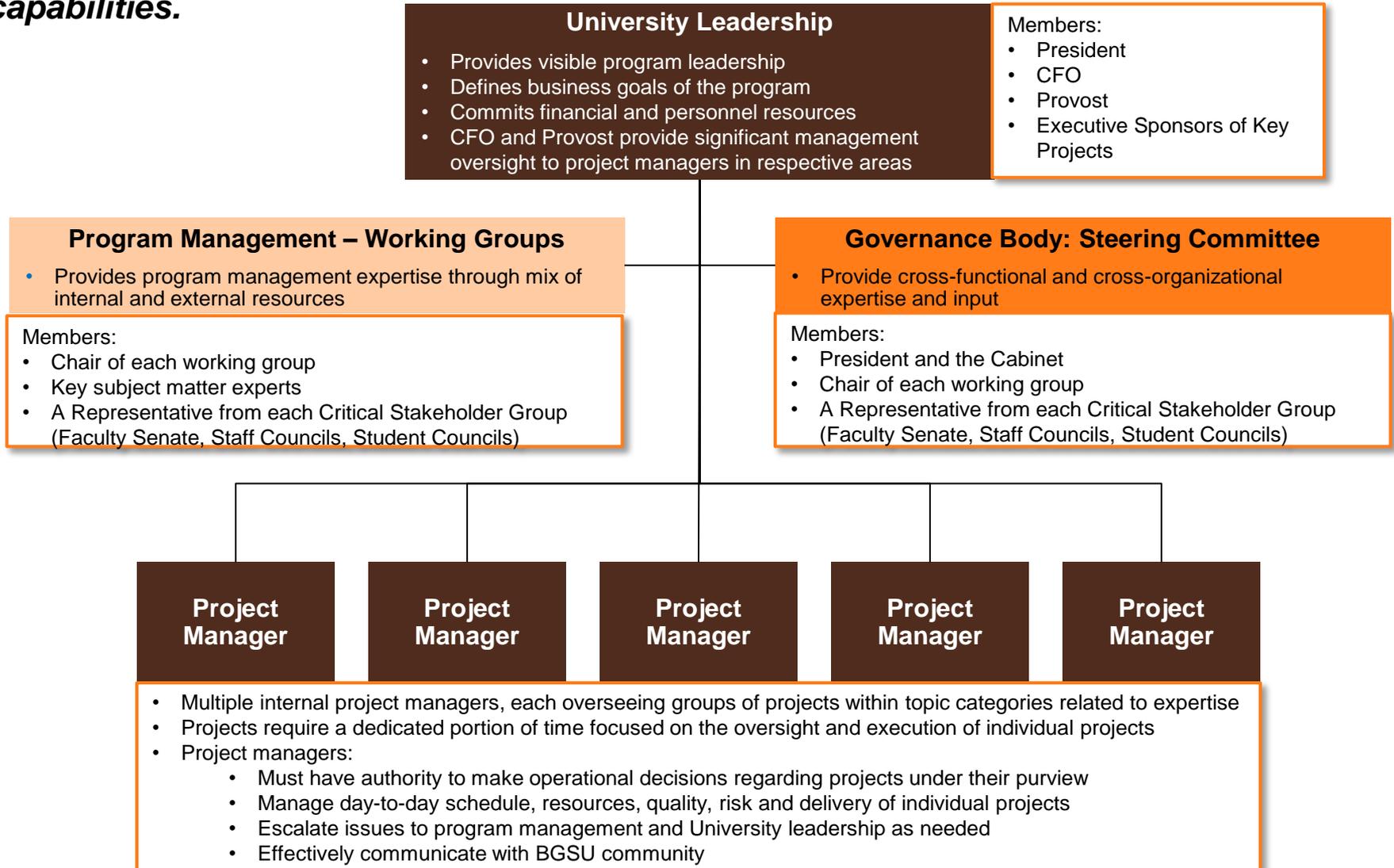
## Scope Management

- Evaluate and approve proposed changes in scope to ensure the scope of individual projects and the program as a whole remains focused

## Performance Monitoring

- Review and monitor performance reporting provided by program management, ensuring continued high quality of service in all impacted areas

**An effective program requires not only commitment of University leadership and committed project owners, but also overarching project management and governance capabilities.**



**Executive Summary**

**Summary of Opportunities**

**Opportunity Charters**

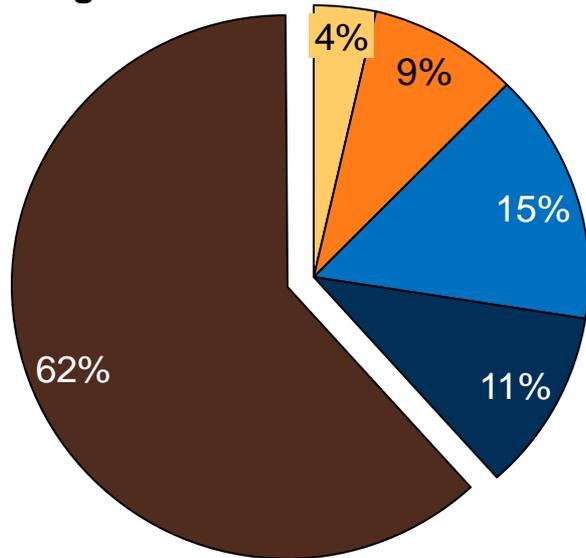
**The Path to Change**

**Appendix**

**While most turnover at BGSU is made up of contract staff, nearly 250 full-time faculty and staff leave every year.**

## Avg. Annual Turnover Breakdown

Total Avg. = 642



- Retirements - Faculty
- Retirements - Admin + Classified
- Separations - Admin + Classified
- Separations - Faculty
- Other (Contract Faculty (FSM/F05/F04) & Staff)

**On average, nearly 250 (9%) of full-time faculty, administrative, and classified staff leave the University each year**

Avg. 2009-2013	Retired	Term
Faculty	23.2	69.4
FT Classified + Admin	57.2	96.2
<b>TOTAL</b>	<b>80.4</b>	<b>165.6</b>

***As part of this report, mention of peer institutions is indicative of either the Ohio Board of Regents officially recognized peer institution list and/or the set of 13 Ohio State System Universities.***

## **Universities officially recognized as peer institutions for BGSU by the Ohio Board of Regents**

- Ball State University
- Illinois State University
- Indiana University of Pennsylvania
- Northern Arizona University
- Northern Illinois University
- SUNY Binghamton
- University of North Carolina-Greensboro
- University of North Texas
- University of Northern Colorado
- University of Southern Mississippi
- University of Texas-Arlington
- Western Michigan University

## **Ohio State University System**

- University of Cincinnati
- Ohio State University
- University of Toledo
- Miami University
- University of Akron
- Ohio University
- Cleveland State University
- Youngstown State University
- Wright State University
- Kent State University
- Central State University
- Shawnee State University

## Opportunity 2A:

- Student feedback from: <http://efficiency.bgsu.wikispaces.net/file/view/Graduate+Student+Survey.pdf>
- Indiana University <https://usss.iu.edu/sites/StudentServicesInitiative/Pages/SSI-Announcements.aspx>
- McGill University Service Point [http://www.mcgill.ca/integratedservices/sites/mcgill.ca/integratedservices/files/issp\\_mcgill\\_university\\_case\\_study.pdf](http://www.mcgill.ca/integratedservices/sites/mcgill.ca/integratedservices/files/issp_mcgill_university_case_study.pdf)
- University of Nevada Las Vegas Case Study <http://digitalscholarship.unlv.edu/thesesdissertations/401/>
- Drexel Central, date of implementation and purpose: <http://www.drexel.edu/strategicPlan/initiatives/academics/progress/>
- St. Joseph's University Hawk Central <http://www.sju.edu/int/resources/srfs/about.html>

## Opportunity 2B:

- “More than one-third of respondents’ total 2012-13 expected new college hires will come from that organization’s internship and co-op programs” <https://www.naceweb.org/uploadedFiles/Content/static-assets/downloads/executive-summary/2013-internship-co-op-survey-executive-summary.pdf>
- In 2013, 63.2% of graduating seniors had completed an internship, co-op, or both <http://www.naceweb.org/s06262013/internship-co-op-during-college.aspx>
- BGSU's Co-op and Internship Taskforce <http://www.bgsu.edu/offices/provost/file127398.pdf>
- Graduating Senior Questionnaire 2013: Satisfaction with Career Services <http://www.bgsu.edu/offices/ir/file135904.pdf>
- For reference: Additional Career Services Benchmarks <http://www.naceweb.org/surveys/benchmarks.aspx>
- BGSU Co-op and Internships Taskforce 2012 <http://www.bgsu.edu/offices/provost/file127398.pdf>
- For reference, example of BGSU's internship/co-op partnership with the state [http://www.bgsu.edu/offices/mc/features/2013/01/grant\\_coops\\_internships.html](http://www.bgsu.edu/offices/mc/features/2013/01/grant_coops_internships.html)

## Opportunity 2C:

- BGSU and Ohio peer enrollment of international, graduate, and transfer students from IPEDS, International and transfer counts were only available for 2011, graduate student enrollment for 2012. <http://nces.ed.gov/ipeds/datacenter/>
- Ohio University information on rising nontraditional population in Ohio: <http://www.ohio.edu/compass/stories/10-11/10/jeffers-nontraditional-2011.cfm>
- BGSU Efficiency Task Force Graduate Student Survey: <http://efficiency.bgsu.wikispaces.net/file/view/Graduate+Student+Survey.pdf>
- National Center for Education Statistics: <http://nces.ed.gov/fastfacts/display.asp?id=98>
- UW Flexible Option: <http://ecampus.wisconsin.edu/online-degree-programs/flex-option.aspx>
- Noel Levitz Report: Top priorities for adult students: <https://www.noellevitz.com/student-retention-solutions/satisfaction-priorities-assessments/adult-student-priorities-survey>

## Opportunity 3d

- [http://www2.westminster-mo.edu/wc\\_users/homepages/staff/brownr/NotebookList.html](http://www2.westminster-mo.edu/wc_users/homepages/staff/brownr/NotebookList.html)
- <http://www.pewinternet.org/Reports/2011/College-students-and-technology/Report.aspx>
- [http://www.insidehighered.com/news/2011/01/20/virtual\\_computing\\_labs\\_could\\_boom\\_as\\_colleges\\_trim\\_costs\\_and\\_grow\\_enrollments](http://www.insidehighered.com/news/2011/01/20/virtual_computing_labs_could_boom_as_colleges_trim_costs_and_grow_enrollments)

## Opportunity 5c

- <http://www.uh.edu/plantops/departments/fm/Facilities-Management-Centralization-Strategy.pdf> Iowa – charge non general fund groups, but general fund free (e.g., academics/administration) for the space they are occupying only.
- <http://www.facilities.uiowa.edu/fmservicesguide.pdf>

## Opportunity 5d

- <http://www.nacs.org/research/industrystatistics/higheredfactsfigures.aspx>
- <http://www.universitybusiness.com/article/curious-longevity-college-bookstore>
- <http://www.nacs.org/research/industrystatistics/collegestoremargins.aspx>

## Opportunity 5e

- Ohio set standardization: <http://www.ohio.edu/policy/01-024.html>, Others at Michigan, Cal system, etc.

## Opportunity 6a

- White House Report on national goal: <http://www.whitehouse.gov/sites/default/files/microsites/ostp/pcast-stemed-report.pdf>
- NW Ohio Hub in Ohio's STEM Learning Network <http://www.osln.org/hubs/northwest-ohio-hub/>
- Partnership examples from report by Center for College Affordability and Productivity [http://www.centerforcollegeaffordability.org/uploads/25Ways\\_to\\_Reduce\\_the\\_Cost\\_of\\_College.pdf](http://www.centerforcollegeaffordability.org/uploads/25Ways_to_Reduce_the_Cost_of_College.pdf)
- Master of Health Degree, partnership with University of Toledo <http://www.bgsu.edu/colleges/hhs/advising/page25594.html>
- Bachelor in Nursing program with University of Toledo <http://www.firelands.bgsu.edu/academics/page63976.html>
- Ohio's demand for STEM jobs <http://vitalsigns.changetheequation.org/tcpdf/vitalsigns/newsletter.php?statename=Ohio>
- University of Toledo's ranking in Engineering <http://www.universityreport.net/us-engineering-school-rankings-2012>
- Woodrow Wilson Teaching Fellowships <http://artsandsciences.osu.edu/wilson-foundation>
- Example of National Science Foundation recipient institutions in Ohio [http://www.cleveland.com/metro/index.ssf/2013/10/colleges\\_in\\_ohio\\_receive\\_grant.html](http://www.cleveland.com/metro/index.ssf/2013/10/colleges_in_ohio_receive_grant.html)

## Opportunity 6b

- Online enrollment information from Babson Survey Research Group <http://www.onlinelearningsurvey.com/reports/changingcourse.pdf>
- Online Program Enrollment info from [https://www.estudentservices.org/press/chancellor\\_carey\\_stresses\\_value\\_distance\\_learning\\_conference\\_staff\\_ohio\\_e\\_learning\\_initiatives](https://www.estudentservices.org/press/chancellor_carey_stresses_value_distance_learning_conference_staff_ohio_e_learning_initiatives)
- Additional information for reference: In 2013, 45% of students take at least one course online <http://www.cruxresearch.com/downloads/refuel%20CE%20press%20release%20061313.pdf>
- Ohio residents who have some college without earning a degree = 22.0%. These tend to be adult students. 26% change in distance education enrollment in Ohio Main campuses 2008-09. [https://www.estudentservices.org/sites/estudentservices.org/files/oln\\_pdfs/Distance\\_Learning\\_Report.pdf](https://www.estudentservices.org/sites/estudentservices.org/files/oln_pdfs/Distance_Learning_Report.pdf)
- UW Flexible Option <http://ecampus.wisconsin.edu/online-degree-programs/flex-option.aspx>

## Low Focus Areas

- Sample of BGSU Programming Attendance: <http://www.bgsu.edu/offices/sa/vp/report/file124847.pdf>
- Ohio Board of Regents 3 Year Program Requirements [https://www.ohiohighered.org/files/uploads/3-yr/3yr\\_Handout\\_FINAL\\_FINAL.pdf](https://www.ohiohighered.org/files/uploads/3-yr/3yr_Handout_FINAL_FINAL.pdf)
- Post Secondary Enrollment Option Participation Figures: <http://education.ohio.gov/Topics/School-Choice/Post-Secondary-Enrollment-Forms-and-Program-Info/Post-Secondary-Enrollment-Option-PSEO>