Marshall University

Vision 20-20 Implementation

Campus Leadership Retreat

June 11, 2015

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Agenda

- Welcome, Introductions and Goals for the Day

- Final Recommendation Summary

- Report from each Workgroup with Q and A

- Spans and Layers

- Prioritization

- Moving to Implementation

- Communication Plan

- Wrap Up

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Final Implementation Team Recommendation Summary

Marshall University
20-20 Implementation Team Summary
As of June 8, 2015

Team	RRT Teams			Implementation Teams			Difference
	Savings/Revenue	Investment	Net	Savings/Revenue	Investment	Net	
Academic	$ 1,690,169	$ 35,000	$ 1,655,169	$ 501,160	$ 276,350	$ 224,810	$ (1,430,359)
Auxiliaries and Facilities	$ 4,282,640	$ 622,850	$ 3,659,790	$ 1,155,477	$ 367,500	$ 787,977	$ (2,871,813)
Administration and Finance	$ 1,330,528		$ 1,330,528	$ 494,000	$ 178,012	$ 315,988	$ (1,014,540)
Printers, Fax, & IT	$ 709,187		$ 709,187	$ 301,687	$ -	$ 301,687	$ (407,500)
Library	$ 312,938		$ 312,938	$ 360,049	$ -	$ 360,049	$ 47,111
Marketing, PR and Web	$ 773,167	$ 405,750	$ 367,417	$ 537,839	$ 30,000	$ 507,839	$ 140,422
Procurement	$ 1,298,780	$ 145,000	$ 1,153,780	$ 1,233,487	$ 65,354	$ 1,168,133	$ 14,353
Totals	$ 10,397,409	$ 1,208,600	$ 9,188,809	$ 4,583,699	$ 917,216	$ 3,666,483	$ (5,522,326)

Note: This excludes any savings generated from spans and layers analysis

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Project Goals to Support FY 16 and FY 17 Budget Investments

- Identification of at least $3 million of savings/net revenue from implementation teams and spans and layers for FY 16 - Completed! $3.4 million in FY 16 savings identified.

- Remaining goal to create an additional $4.6 million in savings/net revenue for FY 17

- Moving towards a total target of $8 million

- How do we get from FY 16 to FY 17?

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Academic Team 1A – Continuing Education

- Team Charge – To craft a plan for reviving Continuing Education as a viable and robust revenue source

- Team Members – Monica Brooks, Marcia Harrison- Pitaniello, Glen Anderson, Erika Riley, Homer Preece, Dan Holbrook, Bonnie Prisk, Elizabeth Hanrahan, Tammy Johnson, Deanna Mader, Margie McInerney, Denise Hogsett, Mike Prewitt, Andrew Gooding, David Pittenger, Teresa Eagle

- Opportunities: Many variations of CE are popular and sought after
  - Professional enhancement
  - Personal Interest
  - Activities for area youth
  - Professional CEUs

Academic Team 1A – Continuing Education

- **Total Net Revenue Identified**
  - Year One (FY 16): $85,000
    - Investment in personnel of $76,350
    - **Year One Net Revenue = $8,650**
  - Year Five Projected Revenue: $207,520

- **Next Steps**
  - Establish the Office of Continuing Education – comprised of current employees, repurposed to launch the "New and Improved MU Continuing Education"
  - Over the next 3 months, the Interim Director will implement the start-up of the office, including establishing procedures and enlisting other University offices (finance, admissions, marketing, etc)
  - Make first offerings available early Fall 2015

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- ## Team Charge
  - E-course funding model
  - Increase distance education

- ## Team Members
  - Karen McComas (team lead), Cam Brammer, Robert Bookwalter, Monica Brooks, Traci Christofero, Teresa Eagle, Steve Hensley, Brian Morgan, Mark Robinson,

- ## Summary of Opportunities and Recommendations
  - Infrastructure, admissions, tuition-based, compensation/incentives, program development

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- **Total Net Revenue Identified**
  - Assuming additions to Phase I programs of:
    - 5 more students/17 programs - in 2 years: $416,160
    - 9 students/17 programs – in 3 years: $759,088
    - 15 students/17 programs – in 4 years: $1,248,480
    - 21 students/17 programs – in 5 years: $1,747,872
  - Assuming: Annual $200K (salary and benefits) for five years
    - Total 5 Year Projected Net Revenue: $3,171,600
    - **Year 1 Net Revenue: $216,160**

- **Remaining work to be done/Next Steps**
  - Determine infrastructure, develop a compensation/incentive plan

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Team 2 - Auxiliaries and Facilities

Team 2 Charge:

- Develop implementation plan for lighting capital investment, including roll out plan across campus to maximize savings and service levels

- Evaluate cost savings and service impacts from outsourcing opportunities, prioritize these opportunities and develop RFP documents as appropriate

- Obtain market analysis for sale of University assets (e.g. University Heights)

- Establish priorities for space utilization improvement opportunities, based upon maximization of savings and maintenance of or increase in customer service and satisfaction for both internal and external customers

- Assess ROI from new position hires and establish hiring prioritization, job descriptions, and salary levels

- Develop University energy policy

Our team:

- Brandi Jacobs-Jones, Karla Murphy, Scott Morehouse, Allen Taylor, Scott Anderson, Sonja Cantrell, Marty Newman, Margie Phillips, William "Tootie" Carter, Andrew Darling, Charlann McKenna & Joyce Harrah

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Opportunities and Recommendations

- Planned elimination of positions
- Upgrade lighting fixtures
- Outsourcing opportunities
- Establish an energy policy
- Eliminate public computing facility and e-post office
- Close underutilized space
- Stagger maintenance shifts

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- **Total Net Revenue/Savings Identified:**

  - $1,155,477 Projected Savings
  - $ 367,500 Estimated Laidley demo cost/investment
  - **$ 787,977 Net Savings**

- **Remaining work to be done/Next Steps**
  - Approval from steering committee, RFP's, job searches, communication and implementation

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Team 3 -Administration and Finance

- **Team Charge:**
  - Create professional development plan to allow for maximized utilization of existing technology
  - Develop shared service model(s), including organization structure changes, job descriptions, training needs, necessary operating and capital investments and projected savings and efficiencies
  - Assess MURC payroll surcharge
  - Develop action plan to eliminate unnecessary student insurance
  - Review grant administration processes for efficiency opportunity

- **Team Members**
  - Miriah Young, Nancy Tresch-Reneau, Bruce Felder, Marty Laubach, Carol Hurula, Nina L Barrett, David Steele, John Yaun, Mark Cutlip, Yetta Meadows, Tim Weingart, Layton Cottrill

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Team 3 - Administration and Finance

- ## Summary of Opportunities and Recommendations
  - Implement Shared Services for travel support & budget management first. Then expand to include PAR/EPAF, GA Waivers, and possibly bulk ordering / central stores
  - Reduce MURC payroll surcharge to 5% – ready to implement
  - Improve grant pre-award process by 10% through automation

- ## Total Net Savings Identified
  - **$316,000 FY 2016**

- ## Remaining work to be done/Next Steps
  - Migrate work to shared services center & design processes
  - Develop pre-award grant process workflow

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Team Charge –

- IT staff consolidation and coordination

- Transition to networked printing campus wide

- Assess savings regarding shadow systems and licensing

- Develop action plans for ROI from IT videoconferencing initiatives

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▪ Team Members

- Jon Cutler, IT (Lead)
- Dr. Jan Fox, IT (Steering Liaison)
- Alice Roberts, Bursars Office
- Juanita Parsons, A/P and Payroll
- Teresa Holschuh, College of Arts & Media
- Chris Atkins, College of Business
- Paula Kaplan, IT/Online Design/So. Charleston
- Amad Mirzakhani, IT/So. Charleston
- Holly Simpkins, JCESOM/IT

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Team 4 -Printing Faxing and Information Technology (IT)

Opportunities	Recommendations
Create plan for IT Staff Consolidation and Coordination	**Reduce duplicate effort** and <u>increase</u> IT staff efficiency.
Create plan for transition to shared-network print devices	**Reduce cost-per-page to print**; also <u>increase</u> use of e-documents and e-signatures to eliminate need to print.
Develop assessment and plan for savings regarding shadow systems and licensing.	**Increase awareness/use of existing resources**; <u>reduce</u> costs from duplicated effort and software purchases.
Develop action plans for IT investment/ROI, specifically around video conferencing technology.	**Reduce inter-campus travel costs** with <u>increased</u> use of Skype for Business (formerly Lync) video conferencing

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Team 4- Printing Faxing and Information Technology (IT)

▪ Total Net Savings Identified

RRT / Implementation Opportunity	Projected NRE	
	RRT Team	Plan Team[1]
Consolidate IT Staff within IT division	$366,000	$150,000 [2]
Coordinate IT support positions across campus	60,000	-tbd- [3]
Eliminate desktop printers; move to shared/network printers	150,000	-tbd- [4]
Eliminate shadow systems/ licenses	81,500	100,000
Deferred replacement of video multiplexing controller	33,333	33,333 [5]
Videoconferencing - Skype for Business/Lync	18,354	18,354
	$709,187	**$301,687**

1 – Project savings thru FY16
2 – Savings based on 3 FTE needed to support private computer labs
3 – Saving TBD based on assessment and classification of individual business unit activity
4 – Saving TBD, based on assessment of device workload, avg. $150 per desktop device
5 – Based on deferred replacement of existing hardware

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■ Remaining work to be done/Next Steps

- Staffing opportunities will require assessment with business units (BU) to identify/classify activities into one of 3 categories:
  - ■ Centralized IT service = Common good, efficiency of scale
  - ■ Decentralized IT service = Unique activity strategic to business unit
  - ■ Hybrid/Shared service = Shared responsibility between IT and business unit, often via a managed service level agreement
- Shared network printing requires additional assessment at BU level for usage assessment for the following:
  - ■ Identify non-network devices (not typically shared)
  - ■ Document class of service (single user, small group, high-volume, special needs, etc.)
  - ■ Identify opportunities to <u>eliminate</u> need to print, <u>increase</u> use of e-documents and e-signatures, not simply reducing cost-per-page

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- # Early Successes

  - Campus awareness of centralized IT, software, and services

    - **IT Service Catalog**
      http://www.marshall.edu/it/complete-it-services-catalog/

    - **University Licensed Software**
      http://www.marshall.edu/inforesources/it-available-software/

    - **New Faculty & Staff IT Resources**
      http://www.marshall.edu/inforesources/new-facultystaff-resources/

    - **Regular Major Vendor Product Roadmap Sessions**
      e.g. Ellucian/Banner, Blackboard, Apple, Dell, Microsoft, Adobe, etc.

  - Review major software purchases with Purchasing

  - Lifecycle replacement plan as part of zero-based budget process for computers used by faculty, staff and labs

  - Use of videoconferencing for <u>ALL</u> Print Fax IT Team meetings

  - Begin location mapping of shared network print resources

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Team 5 - Library

- Team Charge: Decrease in duplication of effort by consolidating library Services

- Team Members: Virginia Campbell-Turner, Noah Lamb; Penny Kroll (Chair); Michael McCarthy, McGuffy; Jody Perry)

- Summary of Opportunities and Recommendations:

  - Decrease in FTEs at main library, S. Charleston Library and Health Sciences Library (some have already occurred in last year; others to occur by attrition/retirement)

  - Decrease expenditures in subscription charges (some has already occurred in last year

  - Possibility of cross-training to improve services

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- **Total Net Savings Identified:**

  - To date (2014-2015): Approximately $231,099
  - Estimate (2015-2016): Additional $ 57,230
  - Estimate (2016-2017: Additional $71,720 (if/when attrition/retirements occurs)

- **Remaining work to be done/Next Steps**

  - Determination if cross-training is feasible and would be of benefit
  - Monitoring if attrition/retirement occurs as predicted.

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Team 6: Marketing, PR and Web

Team Lead:	Matt Hayes
	Executive Director of Alumni Relations

Steering Team Liaison:	Ginny Painter
	Senior VP of Communications and Marketing

Team Member	Position Title
Megan Archer	Public Relations Consultant
Kathy Bialk	Director of Student Financial Services
Matt James	Senior Resource Specialist & ACT Coordinator
Deanna Mader	Senior Associate Dean
Jeff O'Malley	Associate Athletic Director & Chief of Staff
Leah Payne	Director of Public Affairs
Shane Tomblin	Assistant Professor - Management and Marketing
John Winters	Director of Printing Services
Beth Wolfe	Director of Recruitment

Team Charge:

1. **Evaluate cost savings and service impacts from outsourcing print services.**
2. **Create implementation plan for consolidation of staff performing PR functions**
3. **Develop plans to move MU websites in-house.**
4. **Create plans for maximizing trademark revenue.**

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Team 6: Marketing, PR and Web

Summary of Opportunities & Recommendations	Total Net Savings Identified	Remaining work to be done/Next Steps
OPPORTUNITY #1: Outsource Selected Print Services 1. Organizationally shift Printing Services to fall under UComm 2. Invest in new digital press, allowing better quality publications and personalized printing at a lower cost of production 3. Consolidate support positions as University-wide business center concept is developed and merge print shop with University mailroom; Relocate print shop from Dewco building to OM B23 while maintaining in-house production	$173,530	Implementation

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Team 6: Marketing, PR and Web

Summary of Opportunities & Recommendations	Total Net Savings Identified	Remaining work to be done/Next Steps
OPPORTUNITY #2: Consolidate Marketing/PR Functions 1. Eliminate vacant positions in UComm – Consolidate at least two decentralized communications staff from colleges to UComm to fulfill those duties. 2. Reevaluate UComm positions via PIQs to focus on increasing workflow and productivity in the office; 3. Revise organizational chart and include indirect reports to UComm from SOM/SOP, Athletics and others as identified; 4. Centralized budget for printing, promotional items and advertising; Corresponding policies will need to be developed 5. Enact University policy restricting departments from hiring Mkt/PR personnel without approval of UComm and Freeze committee	$290,109	Policy Creation Implementation

Team 6: Marketing, PR and Web

Summary of Opportunities & Recommendations	Total Net Savings Identified	Remaining work to be done/Next Steps
OPPORTUNITY #3: University Websites Hosted In-House 1. Terminate COHP web development contract with Bulldog Creative and transfer IT web development position to UComm. Move all web content responsibilities from IT to UComm and all Marshall pages to the WordPress format; 2. Reevaluate efficiency/workability of WordPress including review of training modules for staff. Develop policy that prohibits outsourcing web services without approval from the Office of Purchasing and UComm.	$4,200	Implementation

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Team 6: Marketing, PR and Web

Summary of Opportunities & Recommendations	Total Net Savings Identified	Remaining work to be done/Next Steps
OPPORTUNITY #4: Increase Trademark Revenue 1. Expand logo/brand merchandise at local retail stores, i.e. Drug Emporium, Glenn's, & Hometown. Establish a CLC/Retailer marketing campaign statewide to reach untapped resources, i.e. Tamarack, & various retailers in Southern WV. Placing logo/brand merchandise in national retail stores, i.e. Dick's.	$40,000	Implementation
TOTAL NET SAVINGS	**$507,839**	

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Team 7: P-Card, Procurement and Travel

Stephanie Smith, Karen Barker, Mike Castellani, Carolyn O'Lynn, Cammy Holley, Lisa Maynard, Teresa Bolt, Bob Dorado, Beth Hammers

Team Charge

- Consolidate printer and copiers under managed contract

- Expand use of My Buy

- New P-Card reconciliation process

- Termination of expiring leases

- External travel agency & related policies and procedures

- Rebid suppliers of cable services

- Reduce memberships

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- Rebid Cable Services: Completed, Implemented as of December

- Review expiring leases: Completed, Partial Implementation

- Reduce Memberships Goal: to reduce memberships through unit justification and identification of duplication. On going review of membership with clear identification in Banner creating accurate lists to be reviewed annually.

- Development of Strategic Sourcing Goal: to capture data to increase buying power by mandatory use of MYBUY, allowing rebid of contracts, addition of new vendors to MYBUY and time to develop strategic sourcing mindset.

- Create RFPS for bid for identified services /commodities: Process identified the need and importance to evaluate existing contracts, to increase net revenue enhancements. MU should look at targeted areas such as physical plant, computers, utilities and re-negotiate based on strategic sourcing.

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- Develop plan for consolidation of print/copy Goal: to create a flexible, equitable process: identify workflow efficiencies and optimize procurement for copiers, printers. Consolidate printers, faxes and copiers bases on physical location and usage, in coordination with Team 4 recommendation.

- Travel Goal: to redesign and maximize benefit and value through consolidation of administration process in a shared services center of two in coordination with Team 3 recommendations . To have an approved preferred external travel agency in place.

Remaining: MY Buy decisions, gathering data in an organized manner, development of strategic sourcing culture, continue to evaluate present contracts, turning over projects to implementation leads. P-Card team continuation as set.

Net Revenue Enhancement - $ 1,168,133

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Spans and Layers

- Span of Control - The number of direct reports a manager supervises

- For FY 14 – Marshall's overall average span = 5.1, indicating on average, each supervisor has 5.1 direct reports.

- Bain higher education benchmarks:

  - *Expertise based functions: 6 - 7 average span*

  - *Task based functions: 11 - 13 average span*

- The Steering Committee was charged by President White to review their areas of responsibility and submit a plan to achieve the following targets:

  - Reduction of 10% of state supported compensation

  - Average span of 7-10

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- Proposals resulted in a slight increase in average span from 5.1 to 5.3

- $2,741,125 in potential savings are expected to be achieved by FY2020 through the following:

  - Attrition/Retirements
  - Reassignment of jobs and/or responsibilities
  - Efficiency improvements

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Implementation Prioritization Approach

Net Impact (Low to High) ↑
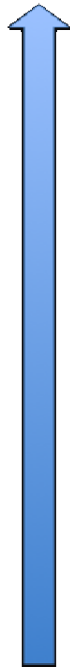
High Impact/Difficult or Longer Timeframe			High Impact/Easier or Shorter Timeframe		
Library reorganization	FY 16/17	$ 128,950	**Library Reorganization - completed**	**FY 15**	**$ 231,099**
Strategic Sourcing/My Buy	FY 16	$ 584,420	**Auxiliaries - Elimination of positions - planned**	**FY 15**	**$ 161,118**
Shared Services/Business Center Model	FY 16	$ 257,988	**Expiring leases for property**	**FY 15**	**$ 127,926**
Outsource Housekeeping	FY 16	$ 349,777	**Review Memberships**	**FY 15**	**$ 3,000**
Reorganize Marketing/Communications	FY 16	$ 290,109	**Rebid Cable Services**	**FY 16**	**$ 61,185**
Outsource Printing Services	FY 16	$ 173,530	Establish energy policy	FY 16	$ 279,255
Hybrid IT organizational structure	FY 16	$ 150,000	External travel agency	FY 16	$ 250,000
IT support position coordination	FY 16	TBD	Upgrade lighting fixtures	FY 16	$ 221,387
Laidley Demo ($43,000 annual savings Year 2)	FY 16	$ (317,000)	Managed contract - printers and copiers	FY 16	$ 101,602
Distance learning expansion (Year 2 only)	FY 17	$ 216,160	Eliminate purchase of desktop printers	FY 16	TBD
High Impact/Difficult or Longer Timeframe		**$ 1,833,934**	**High Impact/Easier or Shorter Timeframe**		**$ 1,436,572**
Restart continuing education	FY 16	$ 8,650	Eliminate IT shadow systems	FY 16	$ 75,000
Eliminate public computing facility/E-Post Office	FY 17	$ 45,000	New Pcard reconciliation process	FY 16	$ 40,000
Combine summer/evening buildings	FY 17	$ 16,300	Increase license affiliated item sales	FY 16	$ 40,000
			2-way video multiplexing controller	FY 16	$ 33,333
			Reduce MURC payroll fees	FY 16	$ 30,000
			Improve grant admin process	FY 16	$ 28,000
			Eliminate MyCourseEval licenses	FY 16	$ 25,000
			Staggering shifts for maintenance	FY 16	$ 24,500
			Video conferencing	FY 16	$ 18,354
			Close upper decks of parking garage	FY 16	$ 7,640
			University website	FY 16	$ 4,200
Low Impact/Difficult or Longer Timeframe		**$ 69,950**	**Low Impact/Easier or Shorter Timeframe**		**$ 326,027**

Ease of Implementation (Difficult to Easier and/or Longer to Shorter Timeframes) →

$ 3,666,483

Note: Bold items complete in FY 15, but not included in FY 15 budget base. These have been included in the FY 16 savings projection.

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Not Just Dollars but Culture Change

- ***Long Term Goal for the University:*** *Financial re-engineering and sustainability planning in anticipation of a markedly lower public funding environment, potentially approaching 90% less state funding ($50 million reduction in State Support) by Fiscal Year 2024*

- October 2013 - Campus Leadership Retreat

- March 2014 - Leadership Retreat – 7 linked projects

- March – Sept 2014 - Rapid Response Team process

- Dec – June 2015 - Implementation Planning Team Process

- July 2015 – Implementation of Recommendations

- Ongoing - Evaluation of additional opportunities

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Moving to Implementation – Approach and Structure

■ Oversight

- Maintain Steering Committee
- Steering Committee to meet monthly
- Rotate leadership – annually or semi-annually

■ Team Member Roles

- Team members will be tapped to support implementation of final recommendations
- Implementation kick off July 1st
- Team members interested in volunteering for implementation based on their expertise should contact Amanda Plumley

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Communication Plan

- E-message from President White

- www.marshall.edu/2020

- E-mail address to submit questions and feedback

- Campus "Town Hall" Meetings

- Campus digital signage campaign

- Weekly "We Are … Marshall" e-newsletter

- Monthly UComm open house

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- Launch Implementation – July 1st
  - Finalize oversight structure
  - Identify implementation leads and groups
- Begin to identify other opportunities to achieve FY 17 target
- Continue communication on project status

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