



Nomination Proposal
SACUBO 2008 “Best Practices” Award

Division of Finance Directors Continuous Improvement Retreat
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DIVISION OF FINANCE

Vision: Be The Benchmark

Abstract

Inspired by a NACUBO seminar titled “Baldrige Goes to College” and in an effort to initiate process improvement, Texas A&M University’s Division of Finance executive staff planned and presented a series of Directors Retreats starting in November of 2006. The areas of concentration during the retreats included strategic planning, customer communication, mission-critical processes, revenue control system implementation, and payroll process gap analyses. As a result, many departments used the opportunity the retreats afforded them to examine and document business processes, re-evaluate business continuity/pandemic plans, and identify technology needs to enhance a quality environment.

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Texas A&M University Overview

Texas A&M University (Texas A&M) is the seventh largest institution of higher learning in the nation, with an enrollment of more than 45,000, including approximately 8,400 studying at the graduate level, pursuing degrees in more than 100 fields. Its 2,500-member faculty is nationally and internationally renowned, with winners of the Nobel Prize, Pulitzer Prize, World Food Prize and other top awards among its ranks. The university is nationally ranked for enrollment of National Merit Scholars (136 in its current freshman class), its research (totaling more than \$550 million annually) and size of endowment (more than \$4.4 billion). It is one of a select few institutions to hold triple federal designation as a land-, sea- and space-grant university. It is the oldest public institution of higher learning established in Texas, opening for classes on Oct. 4, 1876.

A 5,200-acre campus valued at over \$1 billion houses more than 100 buildings and a 434-acre research park. Texas A&M's Colleges of Agriculture, Business Administration, Engineering, Geosciences and Veterinary Medicine are among the largest in the United States, and its Corps of Cadets is the nation's largest uniformed student organization outside service academies. From the university's early focus on agricultural and mechanical studies, it has expanded to encompass ten colleges offering 151 fields of undergraduate study, 147 at the master's level, 105 at the doctoral level and two professional degrees: Doctor of Medicine and Doctor of Veterinary Medicine.

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Texas A&M's Division of Finance, led by Senior Vice President and Chief Financial Officer, K. Sue Redman, is comprised of five components, over 2,000 employees and an annual operating budget of \$82 million. The five components are: Business Affairs, Chief of Staff, Controller, Employee Services and Finance and Strategic Sourcing. The division is the most demographically diverse in the university with 43.5% non-Anglo employees and 63.3% women employees.

Division of Finance Directors Continuous Improvement Retreat

In May 2006, the Texas A&M's Senior Vice President and Chief Financial Officer and Chief Human Resources Officer attended a NACUBO seminar, titled, "Baldrige Goes to College," and returned to Texas with a goal to initiate process improvement. The division used the Malcolm Baldrige Program framework and the standards and language developed by U.S. college and university accrediting associations, as translated to *Excellence in Higher Education (EHE)* by Dr. Brent Ruben of Rutgers University. The division planned and presented its first Directors Retreat for eighty participants comprised of the Chief Financial Officer and her Executive Staff of Associate Vice Presidents (AVPs), the directors, who report to the AVPs, and their immediate staff.

The kick-off was held in November 2006 to learn and understand the *EHE* principles and begin to apply them to both the division and individual departments led by the directors.

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The multi-day interactive retreat focused on organizational assessment, strategic planning and performance measurement.

The following are some of the areas of concentration on which departments focused for improvement: strategic planning, customer communication, mission-critical processes, parking access and revenue control system implementation, payroll process gap analyses, and strategic sourcing's indicators for each component of the *EHE* framework.

The outcome has been dramatic: two of the groups, the Employee Service Center, and the Strategic Sourcing and Procurement Services Department, are so invested with *EHE* that they plan to pursue the State of Texas' version of the Baldrige Award. Others have used the opportunity to examine and document business processes, recognizing the business necessity. Still others have recognized the value of the *EHE* framework in preparing a business continuity/pandemic plan. Virtually all have identified technology needs to enhance a quality environment; in turn, such identification has permitted economies of scale in acquiring software licenses and securing servers.

The group of directors has met in convocation twice in 2007 to report progress on their quality initiatives. In addition, performance evaluations were revised this year for

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directors, focusing on achievement of Division of Finance goals with the *EHE* framework underpinning their processes.