2020 Best Practices Proposal Form

Completed proposals are to be submitted to
Ronda Reece, Chair, SACUBO Best Practices Committee, info@sacubo.org
The deadline is October 11, 2019.

Best Practices Submission:
Title: Can Higher Ed Work From Home? Utsa’s Path To Large-Scale Business Office Telecommuting

Primary* Contact Information:

The primary contact must be a SACUBO member institution of higher education.

Institution: The University of Texas at San Antonio

Address1: Financial Affairs NPB 4.170
Address2: 1 UTSA Circle
City: San Antonio
State/Prov: TX
Zip Code: 78249
Salutation: ☐ Prof. ☐ Dr. ☐ Mr. ☐ Mrs. ☒ Ms.
First Name: Sheri Middle Name/Initial: L. Last Name: Hardison
Suffix (Jr, III, etc.)
Professional Title: Associate VP of Financial Affairs & Controller
Email: sheri.hardison@utsa.edu
Phone: 210-458-6774
Fax: 210-458-4236
In summer 2018 UTSA’s President began planning for a National Security Collaboration Center that would take advantage of the convergence of cyber security resources and contacts in the city of San Antonio. However, there was no space on campus for the center. Our VP Business Affairs at the time was asked to explore different options, including telecommuting, in order to free up valuable office space. Due to the financial and intangible work-life advantages it could create for employees and primarily paperless processes, UTSA decided to go down this path.

However, when we researched online, we could only find telecommuting resources for specific employees in higher ed. Could we have been the first higher education institution to attempt this on a larger scale for full office functions? We will never know that for sure, but the first office moved one year ago, and our operations are exceeding performance expectations.

**Identify the Solution (250-words maximum):**
*Describe how you identified and developed your best practice solution including those involved with the process, impact on the organization, finances and resources.*

In August 2018 Business Information Services moved to home-based working arrangements. By January 2019, Budget & Financial Planning, Accounting, Payroll, Disbursements & Travel Services, Procard/Travel Card Administration, Human Resources and members of the Financial Services office also moved to full-time telecommuting arrangements.

This project was the biggest administrative and management challenge some of us had ever encountered.

We built processes and solutions for all of the following:
- Determining who would be affected: position-based, not employee-based; determine permanent and rotating office presence;
- Announced through departmental and individual meetings; wide variety of staff responses
- Created telecommuting agreement packages and operating procedures;
- Developed standard equipment needs;
- Employee Assistance Plan presentation on effective telecommuting to affected staff;
- Trained employees on Skype, Microsoft Teams and Adobe Creative Suite;
- Telephone needs;
- Coordinated with Information Technology to deploy, provide ongoing support for telecommuting and develop standards for those working with sensitive data;
- Coordinated with Facilities for employees that required assistance moving equipment home;
- Coordinated with Campus Services to create cheaper part-time parking options for employees when on-campus;
- Redesigned smaller office footprint into open-environment, temporary workstations that house a larger group of employees;
- Designed workarounds for few remaining paper processes, including centralizing work study students to support multiple departments;
- Built metric reports for processing departments to monitor productivity;
- Changed all job postings to show requirement to telecommute AND requirement to periodically come on campus at employee's expense;
- Maintain employee engagement through mandatory division-wide events and regular supervisor meetings.

**Implementation Timeline:**

*Provide a bulleted list of the steps and implementation timeline of your best practice solution.*

1. July 2018 - Executive decision to implement telecommuting initiative
2. August 2018 - Planning (BIS, Budget & Financial Planning and Financial Affairs);
3. BIS deployed
5. October 2018 - Accounting deployed
6. November 2018 - Payroll deployed; HR began planning
7. December 2018 - Disbursements & Travel Services deployed
8. January 2019 - HR deployed; all identified departments are working remotely
9. February 2019 - modification of remaining space
10. Assessment - Continuous; Regular meetings with IT; Quarterly Financial Affairs supervisor meetings

**Benefits & Retrospect:**

*Provide a brief statement of the benefits achieved by implementing the best practice solution.*
Almost 120 employees have moved to full-time telecommuting, freeing up more than 15,000 square feet of office space. The general consensus of affected staff is that they have more personal time, fewer work-related expenses and are more productive in their home office environments. The project was also a rewarding collaboration between the affected division heads, as we regularly met and planned the details together and continue to work in a shared space.

**Additional Team Contact Information:**

**Additional Contact #2:**

Institution: The University of Texas at San Antonio  
Address1: Budget & Financial Planning, NPB 4.170  
Address2: 1 UTSA Circle  
City: San Antonio  
State/Prov: TX  
Zip Code: 78249

Institution:  
- ☒ Research  
- ☐ Comprehensive/Doctorate  
- ☐ Small Institutions  
- ☐ Community College

Salutation:  
- ☐ Prof.  
- ☐ Dr.  
- ☐ Mr.  
- ☐ Mrs.  
- ☒ Ms.

First Name: Tammy  
Middle Name/Initial:  
Last Name: Anthony  
Suffix (Jr, III, etc.)

Professional Title: Asst. VP Budget & Financial Planning  
Email: tammy.anthony@utsa.edu  
Phone: 210-458-6631  
Fax: 210-458-4236
Additional Contact #3:

Institution: The University of Texas at San Antonio
Address1: Business Information Services, NPB 4.170
Address2: 1 UTSA circle
City: San Antonio
State/Prov: TX
Zip Code: 78249

Institution:
☒ Research  ☐ Comprehensive/Doctorate  ☐ Small Institutions  ☐ Community College
Salutation: ☐ Prof.  ☐ Dr.  ☒ Mr.  ☐ Mrs.  ☐ Ms.
First Name: Carlos
Middle Name/Initial:
Last Name: Gonzales
Suffix (Jr, III, etc.)
Professional Title: Director of Business Information Services
Email: carlos.gonzales@utsa.edu
Phone: 2110-458-8614
Fax: 210-458-4236

Additional Contact #4:

Institution:
Address1:
Address2:
City:

State/Prov:

Zip Code:

Institution:

☐ Research  ☐ Comprehensive/Doctorate  ☐ Small Institutions  ☐ Community College

Salutation:  ☐ Prof.  ☐ Dr.  ☐ Mr.  ☐ Mrs.  ☐ Ms.

First Name:

Middle Name/Initial:

Last Name:

Suffix (Jr, III, etc.)

Professional Title:

Email:

Phone:

Fax:

Form: Updated July 1, 2019