Campus Conversation:

UPDATE ON THE WVU MODERNIZATION PROGRAM

October 11, 2022

TODAY'S PRESENTERS

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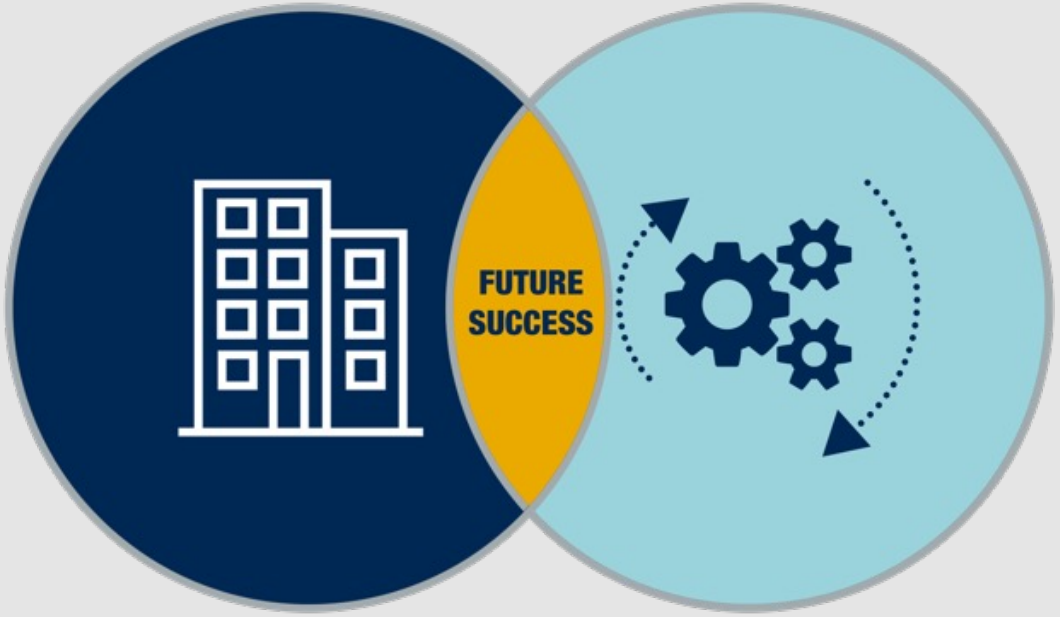
BACKGROUND

INVESTING IN WVU'S FUTURE

Similar to West Virginia University's capital investments to develop or enhance **physical spaces** across our campuses, we also must invest in the **technology systems and processes** to ensure our future success.



The WVU Modernization Program will ensure that West Virginia University becomes the land-grant university of the future.

This will be accomplished by engaging students, faculty and staff across the campus community in a multi-year initiative to transform the user experience and position the University for future success through optimized systems and practices.

WVU MODERNIZATION PROGRAM: MISSION

FOUNDATIONAL PROJECTS UPDATE

FOUNDATIONAL PROJECTS

PROJECT	*CATEGORY*	*STATUS*
Chart of Accounts	*Business Process Optimization*	**COMPLETED**
Information Security Strategy	*IT / Technical Projects*	**COMPLETED**
API Management Platform	*IT / Technical Projects*	**ACTIVE**
Application Development Platform	*IT / Technical Projects*	**ACTIVE**
Budget Model Redesign	*Business Process Optimization*	**ACTIVE**
ERP RFP Creation and Evaluation	*Business Process Optimization*	**ACTIVE**
Job Family Architecture	*Business Process Optimization*	**ACTIVE**
Data Management and Governance	*Data Management and Governance*	**ACTIVE**
Student Experience Enhancement	*Student Experience Enhancement*	**INITIATING**

Learn more at ***go.wvu.edu/Modernization-Program-Foundational-Projects***.

ENGAGING OUR CAMPUS COMMUNITY

We have worked and collaborated with hundreds of leaders, strategists and subject matter experts in a variety of areas across WVU to date. We will continue to involve many students, faculty and staff in the coming months as efforts continue.

A Closer Look:

JOB FAMILY ARCHITECTURE

BACKGROUND

DEVELOP

Develop a job architecture that includes position families, functions, levels and titles for staff roles across the University that will support internal consistency and transparency

CREATE

Create job titles that align with market standards, which will support our efforts to attract, retain and develop talent at WVU and facilitate more visible career paths

UTILIZE

Utilize new job structure to enable greater functionality in the new ERP and support ongoing position management

We are here

PHASE 1: Planning and Initiation

PHASE 2: Understand Current State

PHASE 3: Analyze/Design Job Architecture

PHASE 4: Develop/Update Job Profiles

PHASE 5: Change Management, Campus Socialization

PHASE 6: Initial Mapping Incumbents to New Architecture

PROJECT SCOPE

In Scope

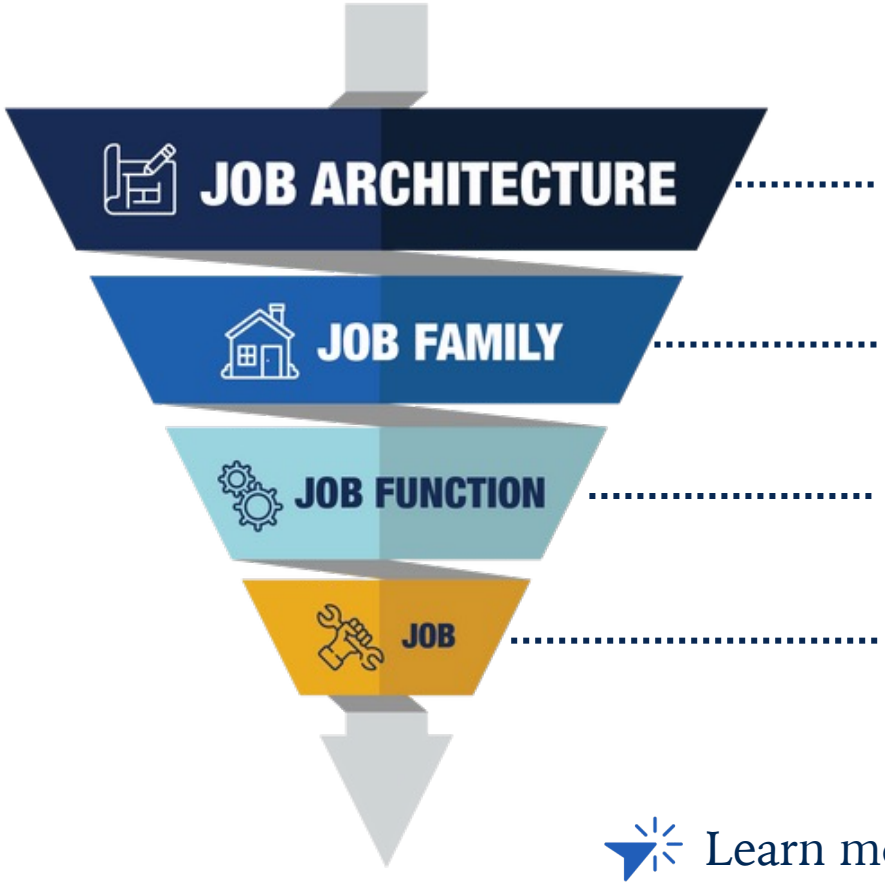
- All **staff** positions at WVU campuses (**Main Campus**, **Health Sciences**, **WVU Keyser** and **WVU Beckley**)
- **WVU Research Corp.**
- Job family architecture and job profiles (category, family/function, title, title standards)
- Mapping titles to new structure
- Communications and implementation strategy

Out of Scope

- **Faculty tenure** and **non-tenure position titles**, as well as **students** and **graduate assistants**

THE PROTOTYPE

The project's cross-functional design team has established a **job architecture prototype**, as well as definitions for how staff jobs will be categorized at WVU.



JOB ARCHITECTURE

A **standard framework** used to organize employee positions based on **responsibilities**, **scope** and **skill/education** requirements, but not necessarily relative to reporting structure

JOB FAMILY

Collection of jobs involving similar **types of work** and requiring similar **training**, **skills**, **knowledge** and **expertise**

Example: **FINANCE**

JOB FUNCTION

A **subset** of a **job family**; usually more **specialized** in nature

Example: **ACCOUNTING**

JOB

The **work** being performed by an **individual** that is defined by a **job title**

Example: **ACCOUNTANT II**

Learn more at ***go.wvu.edu/JobFamilyPrototype***.

JOB FAMILIES

Academic and Student Services	Library and Museum
Agriculture and Animal Care	Organizational Administration
Athletics	Outreach and Community Engagement
Communications and Marketing	Planning and Analysis
Development and University Advancement	Public Safety
Finance	Research
Health Services	Research Administration
Information Technology	Talent and Culture
Instructional Support	University Operations
Legal and Compliance	

Learn more at ***go.wvu.edu/JobFamilies***.

UPCOMING PROJECT ACTIVITIES

ACTIVITY	***TIME FRAME***
Draft a set of **job profiles** to be reviewed with functional **subject matter experts** and **stakeholders**	*Fall 2022 through late 2022*
Communicate the **new architecture** and any related changes on a timeline that is coordinated with other aspects of the WVU Modernization Program	*Fall 2022 through ERP implementation*
Perform a first round of mapping incumbents to **job profiles**, which will be validated with **unit managers** near the launch of the new ERP system	*Winter 2023*

A Closer Look:

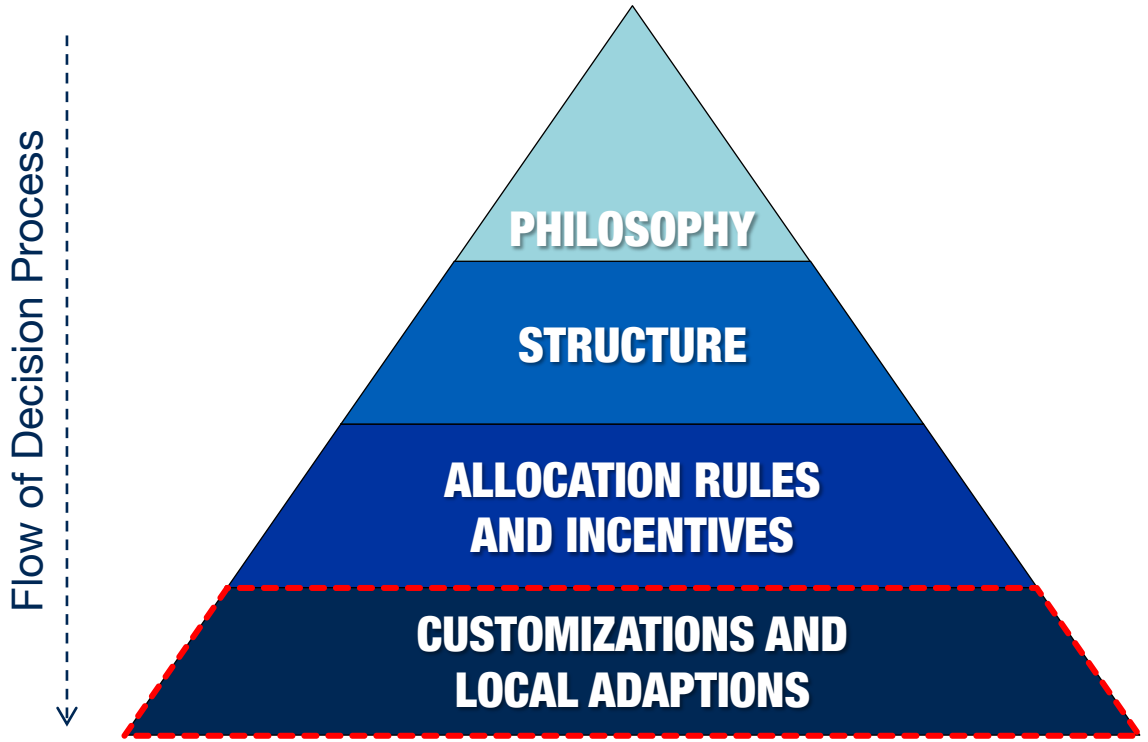
BUDGET MODEL REDESIGN

BACKGROUND

- A new **WVU budget model** will improve **transparency**, **decision-making** and **alignment** around the University's **strategic goals**.
- After completing all five phases of work, the **new budget model** will be implemented in **July 2023**.
- The final phase (**Parallel Process**) is a **proof-of-concept exercise**, which will accommodate changes as needed.

STAGES OF MODEL DEVELOPMENT

Effective budget redesigns require four stages of decisions with each stage necessitating increased levels of institutional insights and customizations.



- **Philosophy:** reflects WVU's desired financial management model, considering elements such as centralization, authority, accountability and responsibility
- **Structure:** reflects the elements of the model with respect to scope of funds, categorization of operating units, presentation of data, etc.
- **Rules:** reflects how the model will portray the University's internal economy and drive behavior
- **Customizations:** reflects model tweaks to address operational realities, institutional culture and local unit needs

MODEL STRUCTURE – ORGANIZATION

As part of budget model development, we focused on our organization and differentiating between primary units and administrative support units.

Primary Units

- Ability to influence material **revenue generation**
- Considered revenue generating units
- Revenue is either directly aligned or allocated to these units using variables driven by the unit's activities
- Covers **direct costs** with generated revenue
- Accountable for **financial performance** assuming authority / responsibility for both surpluses and losses
- Recipient of **allocated** costs incurred by administrative support units
- Contributes to a **central funding mechanism** for investment in WVU strategic initiatives and supporting mission critical activities.
- Includes WVU colleges, schools, regional campuses and auxiliaries

Administrative Support Units

- **Limited ability** to influence revenue generation
- May receive some direct mandatory fees (e.g., IT fees), but primary role is to **provide services / support** to **revenue units** and other **administrative support units**
- Operational costs are a focus and units are accountable for managing to budgeted costs
- Accountable for delivering **optimal service levels** within resource envelopes
- Budgeted costs are pooled and then allocated using metrics recommended by **WVU Design Team**
- Includes units like **Academic Support**, **Information Technology**, **Facilities**, **Student Affairs**, **Talent and Culture**, **Shared Services**, **Research Administration**, **University Relations**, etc.

In an incentive-based model, all funds are aligned to the revenue-generating unit, and therefore, administrative support unit costs are allocated to the revenue-generating units to pay for central support services.

PROTOTYPE: INCENTIVE-BASED BUDGET MODEL

The move to an **incentive-based budget model** provides **individual units** with **incentives** to achieve positive financial performance. Each unit will have **greater control** over the **revenue** they generate and the **costs** they incur.

Direct Revenue Alignment

Recognized as revenue by the revenue-generating unit for goods or services provided (e.g., grants and contracts, gifts, etc.)

Direct Expense Alignment

Actively managed (and currently accountable) for direct expenses by the respective academic units (e.g., faculty salaries)

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Revenue Allocation

Transfers revenue ownership from central administration to primary units that generate revenue (e.g., state appropriations, tuition and fees, financial aid, etc.)

Support Unit Cost Allocation

Aligns central support costs to revenue-generating units of facilities utilized and central services provided (e.g., Facilities, General and Administrative, etc.)

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Central Funding Mechanism

Tool to create a pool of resources to address unit-level subsidies, university priorities and strategic initiatives

Learn more at ***go.wvu.edu/BudgetModel***.

UPCOMING PROJECT ACTIVITIES

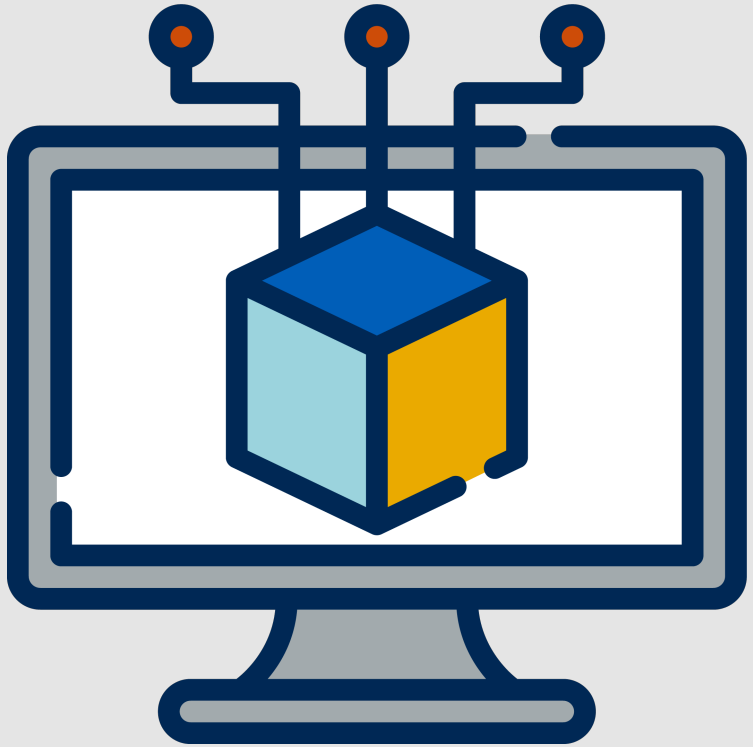
ACTIVITY	*TIME FRAME*
Continue with **stakeholder engagement** and model customization	*Fall 2022*
Develop the infrastructure for the **new budget model**, including the refinement of **processes**, **procedures** and **policies** to align with the new model design elements	*Fall 2022*
Begin **testing** the **redesigned budget model** for a fiscal year (FY2023) in parallel with WVU's current budget model	*Late Fall 2022*

A Closer Look:

ERP SELECTION

BACKGROUND

A new **ERP software system** will meet the University's current and future needs by integrating and managing activities across multiple areas, including **finance**, **human resources** and **student information systems**.



CAMPUS INVOLVEMENT

To help WVU identify an **ERP** platform, we have formed an **ERP Evaluation Committee** with representatives across **Finance**, **Human Resources**, **Information Technology** and **Student Services**, as well as a **Selection Committee** comprising senior leaders across the University.

ERP Evaluation Committee

ERP Selection Committee

UPCOMING PROJECT ACTIVITIES

ACTIVITY	*TIME FRAME*
Evaluate all submitted **RFPs** from **ERP** vendors	*Fall 2022*
Host **ERP vendor demos**	*Fall 2022*
Select **ERP vendor**	*Late 2022*
Conduct **negotiations** and award **contract**	*Late 2022 / Early 2023*

QUESTIONS?

STAY INFORMED

- Visit **modernizationprogram.wvu.edu** for more on the **WVU Modernization Program**.
- Contact **modernizationprogram@mail.wvu.edu** with any questions about the program.
- An archived version of this **Campus Conversation** will be available at **bureaucracybusters.wvu.edu/campus-conversations**.
- Stay tuned for additional **Campus Conversations**.