

Business Services Advisory Group Operations Guidelines

STATEMENT OF PURPOSE: The Business Services Advisory Group (BSAG) was formed in September 2014 and is an advisory committee composed of the chief fiscal and human resources officer from each school, college or major unit, and their representatives, plus representation from the Internal Audit Division and the members of the Business Affairs Advisory Forum (BAAF) Planning Committee. The purpose of BSAG is to assist in the identification and implementation of improved business processes designed for the needs of both the user community and administrative offices. BSAG strives to find solutions to reduce bureaucracy, improve levels of autonomy and risk tolerance, and provide flexibility.

To assist in moving recommendations into action items, BSAG created committees which reach across the major business and human resource administrative functions. This document provides guidelines for how these committees will operate, assign priority to workload, create and manage workgroups, report on progress, and close and communication conclusions and implementation of changes.

Committees: BSAG is led by two co-chairs; one representative from Finance & Administration and one representative from BSAG membership. There are 14 standing committees representing the major functional areas: Budget, Accounting, Accounts Receivable, Faculty Affairs, Purchasing, Travel & Payables, Grants Accounting, Property Control, Banking & Treasury, Payroll, Human Resources, Reporting, Insurance & Claims Management, UGA Foundation, and Training & Communications. Additional committees may be established with BSAG membership approval. Co-chairs may form ad hoc workgroups based on the nature of project(s), as needed.

Committee Co-Chair Roles and Responsibilities: Co-chairs will serve a recommended two-year term on a specific committee and will consist of one representative from the central functional area and one representative from BSAG membership. Committee co-chairs are leaders, drivers, organizers and communicators for their committee and supporters of other committees and work groups. BSAG co-chairs are responsible for ensuring that work groups provide updates to BSAG and serve as a central knowledge holder and reviewer for work performed by the assigned committee. Final recommendations from project work groups will be submitted to co-chairs who will either present or assign someone to present recommendations to BSAG.

Co-chairs hold the responsibility for recruiting project work group members:

- Project/work group members do not have to be BSAG members.
- An open call for project members for new projects will be made through BSAG-L or in a BSAG meeting.
- Members can volunteer for projects or recommend someone from their area that may not be a BSAG member.
- If this call does not result in enough project members, additional Listservs like Business-L or similar should be utilized for a call for project members.
- BSAG co-chairs can serve on projects from other groups.
- BSAG co-chairs will not necessarily be part of the project team for all projects in their group.
- Co-chairs work with existing work groups in establishing realistic, flexible timelines for existing projects to ensure expectations and accountability.

Committee and Work Group Operating Guidelines: Co – chairs and work groups will use the following process to manage evaluation and vetting of business process improvement requests and submitting final recommendations to BSAG:

- Establish working group(s), assign “point person(s)” for the task(s).
- Review the issue, clarify requirements and expected outcomes. Solicit input from users across the University. Note: all BSAG members have permission to post to the BSAG-L. Co-Chairs may use BSAG-L to solicit input, ask questions, communicate updates, etc.
- Research alternatives, solutions from other universities, solicit feedback from users and process owners across the University.
- Prepare recommendations to discuss with BSAG and distribute via email.
- Vet with BSAG via email or as a meeting agenda item.
- Allow for follow up or changes to recommendations.
- Review feedback and changes with work group and users as needed.
- Prepare conclusion and final recommendation and submit to committee co-chairs.
- Co - chairs review and distribute final recommendation via email to BSAG prior to meeting.
- Present to BSAG; this can be accomplished electronically or via facilitated discussion as needed.
- BSAG Approval.
- Approved solutions are implemented by process owners and supporting units.
- Process owners and co-chairs draft communication to units, faculty and staff.
- BSAG leadership will assist with final communications to UGA community. These communications will follow the formal communications protocols of the unit which is the “business process owner.”

Process for managing business process improvements and systems enhancements:

- The running list of requested improvements by functional area can be found on the [enhancements roadmap](#).
- Co-chairs have edit permissions (edit link at the bottom) on this site and are responsible for maintaining updated statuses of each item and adding target dates for resolution.
- The statuses for each item are as follows:
 - Newly Requested: All new requests; this is not publicly visible.
 - Under Review: This acknowledges the requested as reviewed, but no solution yet.
 - In Progress: A solution is in progress.
 - Recommended for Closure: Proposed solution or workaround has been communicated.
 - Completed: BSAG has agreed to close item; requested solution implemented.
 - Closed: BSAG has to agreed close item; workaround published, but not requested solution.
- Updating target dates is important. This allow BSAG to build a roadmap of upcoming improvements for institutional awareness. It is okay for target dates to shift.
- Enhancements roadmap reference materials are available for [adding a new entry](#), [updating an existing entry](#), and [general roadmap navigation](#).
- Prior to each BSAG meeting, co-chairs will be expected to complete a written report. This is brief and consists of any updates from the committee that do not require discussion. This allows time at the meeting for any items that do need discussion. A template will be emailed to all co-chairs.
 - Co-chairs should ensure that the business process “owner” and applicable management have awareness of the status of items and recommendations.
- When an item is marked “recommended for closure,” it is added to a survey that goes to all BSAG members. This allows co-chairs to gauge consensus on proposed solutions.