School of Literatures, Cultures, and Linguistics (SLCL) Financial Commitments Process Improvement [UIUC]

Business Case

The School of Literatures, Cultures, and Linguistics (SLCL) recorded $1.8 million for 296 commitments, spanning 13 departments with total state funds of $14.4 million. Currently, financial commitment processing at SLCL is time consuming, manually intensive and difficult to track/maintain. There is a strong dependence on a single Business Office staff member. Funds are not transferred in a timely manner after the event occurs and SLCL financial statements appear inaccurate due to the nature of commitment processing.

Goal

Streamline and standardize the financial commitment process, reducing the amount of processing time required to complete committed fund transfers after an event takes place.

Approach

Conducted a process mapping session to review the current process with the team. Discussed issues related to the current process and brainstormed towards recommendations for potential solutions on how to resolve the issues identified. Group ranked the potential solutions and determined which solutions should be implemented. Created action plan to implement the solutions. The team requested a demo of the College of Education access database that is currently used for commitment processing. After review of the system, the team determined a need for an IT solution for a long term goal. High level IT needs assessment was conducted to provide ATLAS group with foundation for potential project.

Outcome

Identified 6 short-term and 3 long-term recommendations. Implementing the short-term recommendations helped improve the communication and efficiency of the commitment process to move from one subject matter expert to a team of three. It has also improved the accuracy and integrity of the data collection. The web based application (a long-term solution) is currently being reviewed by the ATLAS team as a potential project to improve the overall efficiency of the commitment process for SLCL and the College of LAS.

Key Findings

- **Only one point of contact for all commitments, which causes delay when that contact is out of office.**
- **All commitments tracked in spreadsheet; only one person can update/edit commitments at a given time, manual data entry in all fields.**
- **Lack of multi-year commitment functionality; manual entry and duplication of data at several points to keep data consistent.**
- **Tracking commitment occurrence as the as both the recipient and the supporter of funds is lacking as there is currently no process to trigger a reminder of collection.**
- **Several steps involved to save documents and attach to commitment within a spreadsheet; issues can arise when links to documents are broken due to server moves and folder moves.**

PPMO-0049 Executive Summary
BPI Shared Service

Short-term Improvement Recommendations

1. **Create shared email account for business office –** Move from silo process to a team of people working on commitments to ensure greater efficiency.
2. **Develop standard for commitment collection date –** Determine when and how commitments will be collected using standardization among the team.
3. **Update commitment spreadsheet to add event date and remove commitment received date –** Sort data by event date in chronological order to view upcoming commitments to allow team to collect in a timely manner.
4. **Create tabs in spreadsheet for each fiscal year –** Allow creation of multi-year commitments to be viewable in one document and view history of past commitments.
5. **Store commitment documents within shared email account –** Save time and steps to keep documents within folders on shared email account.

Long-term Improvement Recommendations

1. **Add drop down menus to spreadsheet and re-format data for data accuracy –** Ensure data is consistent and provides standard formatting for future use/conversion into long term IT solution.
2. **Create web based commitment processing application –** Engage ATLAS application development team to resurrect archived application for commitment processing that was started a few years ago.

Implementation of Recommended Improvements

Short term recommendations were implemented over a two week time frame. A meeting was held with ATLAS to discuss a potential long term IT solution to resurrect an archived application for commitment processing. This application was archived a few years ago due to retirement of project sponsor and transitioning of other key stakeholders. ATLAS will review the application and determine a gap needs analysis and have discussion with SLCL team in January.