Business Operations: Structure and Communications

June 2012

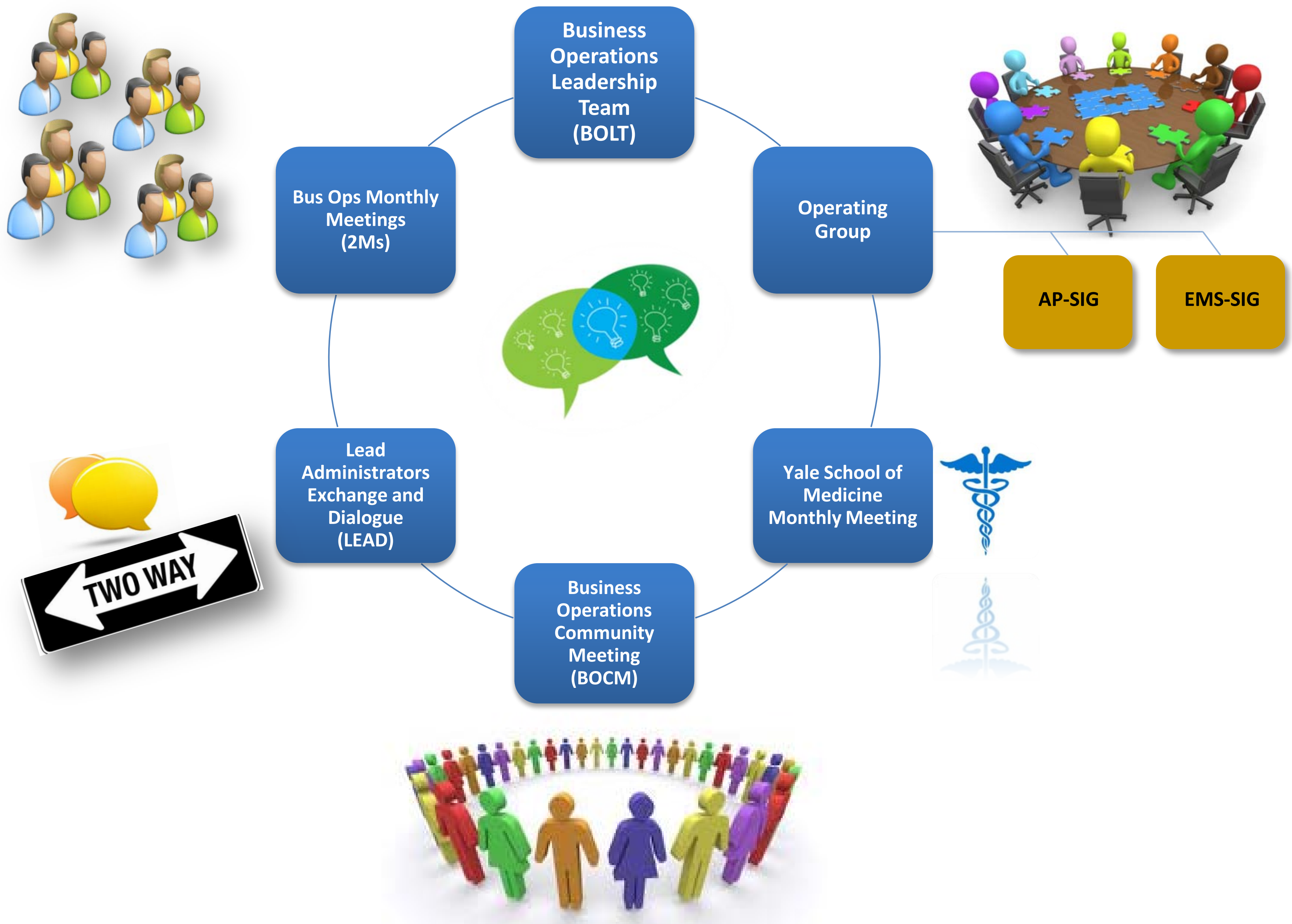
Yale *Business Operations*

Business Operations Overview

Today's Agenda

- What is Business Operations?
- What do the different Business Operations groups do?
- What are Lead Administrators & Operations Managers?
- How does Business Operations Communicate?

Business Operations Meetings



Business Operations

The Business Operations organization consists of…

- **Central Staff of the AVP of BO**
- **The Deputy Dean, YSM**
- **YSM Finance & Administration**
- **BOLT**
- **Departmental Business Offices**

- Provide easier and more integrated administrative tools and support
- Balance need to provide business and administrative support that addresses specific department/school needs with University needs as a whole
- Identify common and unique needs; design and implement policies, procedures and tools to meet those needs
- Ensure appropriate internal controls
- Build a community of business professionals
- Working groups provide guidance and subject matter expertise regarding business and financial challenges (from operational matters to University-wide strategic initiatives)

Business Operations Leadership Team (BOLT)

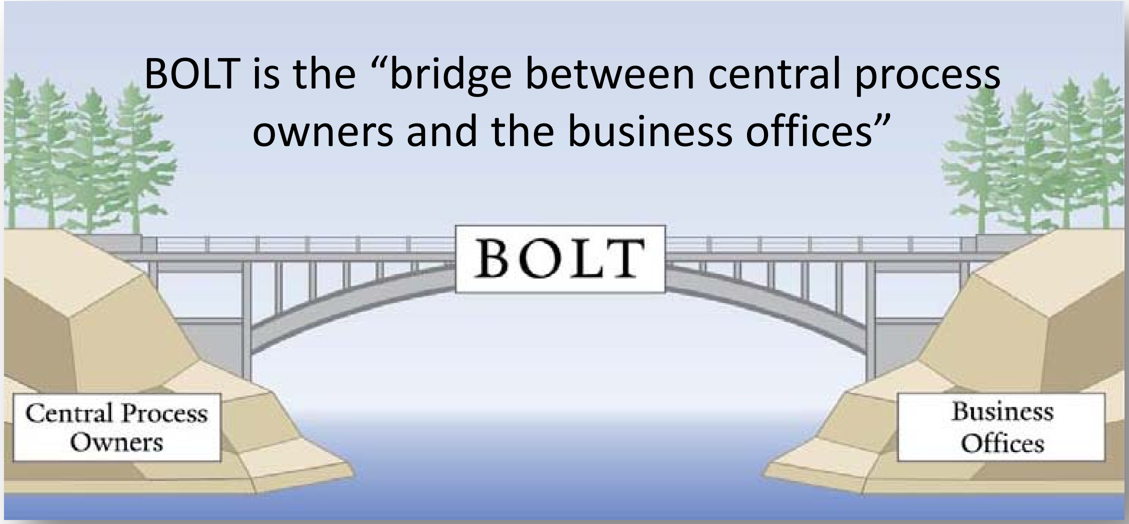
The BOLT is…

APPOINTED BY:
Vice President
for Finance & Business
Operations

CHAIRED BY:
Assistant Vice President
for Business Operations

- Ensures that faculty, students and staff members receive high quality financial and administrative support
- Represents all schools, units and departments
- Responsible for improving finance and administration for respective areas and collectively for the University in total
- Sets goals for Business Operations and defines the strategy that will achieve these goals
- Primary point of connection between central process owners (CPO) and department business offices
- Facilitates the partnership with central process owners and serves as the decision making body regarding issues that touch upon business offices

Partnering with Central Process Owners



- ***Cross-Campus Forum with Key Partners*** held March 20, 2012
  - purpose: share ideas, plans, and initiatives across campus

- **BOLT**: provide leadership and act as the collective voice of the University business offices

- **Partners:** inform BOLT *early* of proposed changes or initiatives that can impact or require support of the business operations community

Key Partners and BOLT Liaisons

Office	Partner	Bolt Liaison
Administration	Janet Lindner	Brian Rebeschi
Compensation and Benefits	Hugh Penney	Jack Beecher
Controller's Office	Steve Murphy	Brent Dickman
Development	TBD	TBD
Employee Relations and Labor Relations	Donna Cable	Julie Grant
Facilities	John Bollier	Carrie Capezzone
Financial Planning	Steve Murphy	Brent Dickman & Cynthia Walker
General Counsel	Cynthia Carr	Jack Beecher
HR Operations and Staffing	Nancy Creel-Gross	Julie Grant
Information Technology	Len Peters	Diane Palmeri
Internal Audit	Doug Bebbington	BOLT
Labor Relations	Donna Cable	Julie Grant
Office of International Affairs	Don Filer	Diane Palmeri
Office of Public Affairs & Communications	Hellen Hom-Diamond	Julie Grant
Office of Risk Management	Sal Rubano	Brent Dickman
Office of Sustainability	Julie Newman	Julie Grant
Organizational Effectiveness	Elena DePalma	Jack Beecher
Procurement	John Mayes	Holly Piscatelli
Research Administration	Andy Rudzynski	Cynthia Walker & Carrie Capezzone
Student Financial & Admin Services	Ernie Huff	Brian Rebeschi
Yale Shared Services	Ronn Kolbash	Holly Piscatelli

Operating Group

The Operating Group is…

APPOINTED BY:
BOLT

CHAIRED BY:
The BOLT Liaison

- Delegated by the BOLT as the decision making body for Business Operations regarding operational matters that affect business offices
- Determine which issues can be resolved by the OG and those that should be brought to BOLT
- Partners with CPOs to provide the Business Operations' perspective on operational matters
- May form advisory groups (AG) or special interest groups (SIG) to provide subject matter expertise, or area perspective to aid decision-making
- AGs or SIGs provide recommendation/decision to OG or BOLT on behalf of community; partner w/ process owner on an initiative

BOLT's Partnership with Central Process Owners

Business Operations is operationally and strategically organized to support the University's mission of teaching, research, leadership, and patient care.

Leadership Roles within Business Operations

Business Operations promotes two-way communication and feedback about a range of finance and business matters through a network of meetings and working groups.

The Lead Administrator (LA) Role

The primary purpose of the LA is to:

- Identify, mobilize, and optimize financial and other resources to help advance the unit's and University's mission

- Ensure that the unit's faculty, students and staff receive high quality administrative support in a manner compliant with University policies and procedures. The LA enables faculty and program leadership to maximize their focus on program activities and minimize their time required on administrative activities.

The LA fulfills this purpose by being a) the strategic administrative partner to unit leadership; b) the chief financial steward for the unit; and c) the leader (and when necessary manager) of administrative support services for the unit.

The Lead Administrator Reporting Relationships

The lead administrator has a dual reporting line to their designated unit leader(s) and a cognizant Business Operations leader.

The Operations Manager (OM) Role

The purpose of the Operations Manager (OM) is to:

- Ensure that each assigned unit's faculty, students and staff receive high quality administrative support in a manner compliant with University policies and procedures, and

- Marshal and leverage available resources (financial or other) to help advance the unit's and University's mission. The OM enables faculty and program leadership to maximize their focus on program activities and minimize the time required for administrative activity.

The OM fulfills this purpose by:

a) Managing and implementing assigned financial and/or administrative support services for the unit

b) Assessing the unit's operational challenges and opportunities, working to address solutions with the Lead Administrator and/or others as appropriate

c) Serving as a critical conduit for strengthening the interface between unit needs/requirements and service provider activities

The Operations Manager reports to the LA

Business Operations Website

Documents

- Bus Ops Organizational Redesign
  - Structure and Groups
  - Partnering with Unit Leaders
  - Philosophy of Planning and Financial Management
- Leadership Roles (image)
- Business Operations Network (image)
- BOLT Charter
  - Partnering with process owners
  - BOLT Guiding Principles
- Operations Manager Position Architecture
- Lead Administrator Position Architecture
- Lead Administrator Position evaluation Process

Go To: http://www.yale.edu/fin-bus/businessops/

Business Operations Website

Contact Information

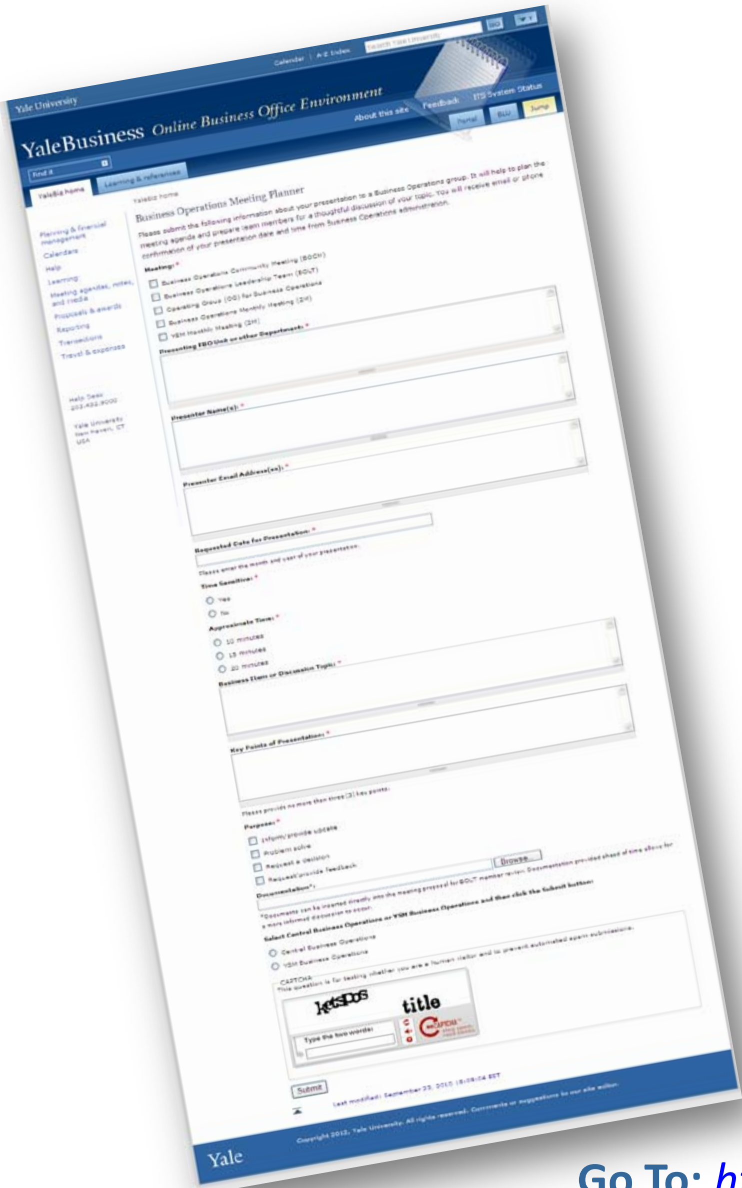
- Directories: LAs/OMs
- Bus Ops Organization Chart
- Business Operations Central Staff
- Current BOLT members

Links

Yale Business (Yale BIZ)
Business Ops Meeting Planner
Bus Ops Message Standards
YaleBLU
Policies & Procedure
Portal

Go To: http://www.yale.edu/fin-bus/businessops

Business Operations Meeting Planner



Submit after conferring with the Business Operations Liaison (Holly Piscatelli)…

- Select meeting
- Presenting department
- Presenter name, email
- Requested date for presentation
- Purpose: inform, update, problem solve, request a decision, request/provide feedback
- Documentation, slides
- Choose YSM, Central Business Operations

Go To: http://yalebiz.yale.edu/meetings/busops-planner

Business Operations Communications Standards

Communication Standards

- Broadcast Messaging Standards
- Messaging Process
- Business Ops Meeting Planner

Go To: http://www.yale.edu/fin-bus/businessops/standards.html

Business Operations Communicator's Toolkit

Communicator's Toolkit


your topic.

Communicators Toolkit

The following are links to several documents and guides to aid in the development of communication plans, messages and messaging format:

Planning and process
- Communication Plan Template
- Messaging Process
- Know, Feel, Do. "32 Ways to do Less and Accomplish More", Bill Jensen

Message composition
- Broadcast messaging standards
- Using the Inverted Pyramid Style of Writing
- Proofreader's Marks
- "The Ultimate Ten-page Presentation", Bill Jensen
- Using the Inverted Pyramid Style of Writing

Formatting and images
- Visual Brand Identity for Yale University
- "Yale Blue" color
- The Yale Typeface (only available for Yale related projects)

Using Email Banners in Messages

In the event that you need to create a communication from scratch, please keep in mind that the reference to the banner must be absolute. This means that you must use the complete url in order for the image to display:

Yale

- Communication Plan
- Know, Feel, Do
- Inverted Pyramid Writing Style
- Proofreader's marks
- Yale Visual Brand Identity
- Using Email Banners

Go To: *http://www.yale.edu/fin-bus/businessops/standards.html*

Know, Feel, Do: Bottom Line of Communication

People are listening for one thing, “How does this affect me?” Tailor your communications to the needs of the *receiver*.

1. KNOW:

- **“What’s the one thing I want people to know, understand, learn, or question?”**

Ideally, your answer should be no longer than one sentence. Write it down.

2. FEEL:

- **“How do I want people to feel when I’m done?”**

Ideally, your answer should be no longer than one sentence. Write it down.

While you can’t mandate how people will feel — (“Be happy, Darn it!”) — this reminds you to prepare for the emotional impact of your words, possibly changing your delivery.

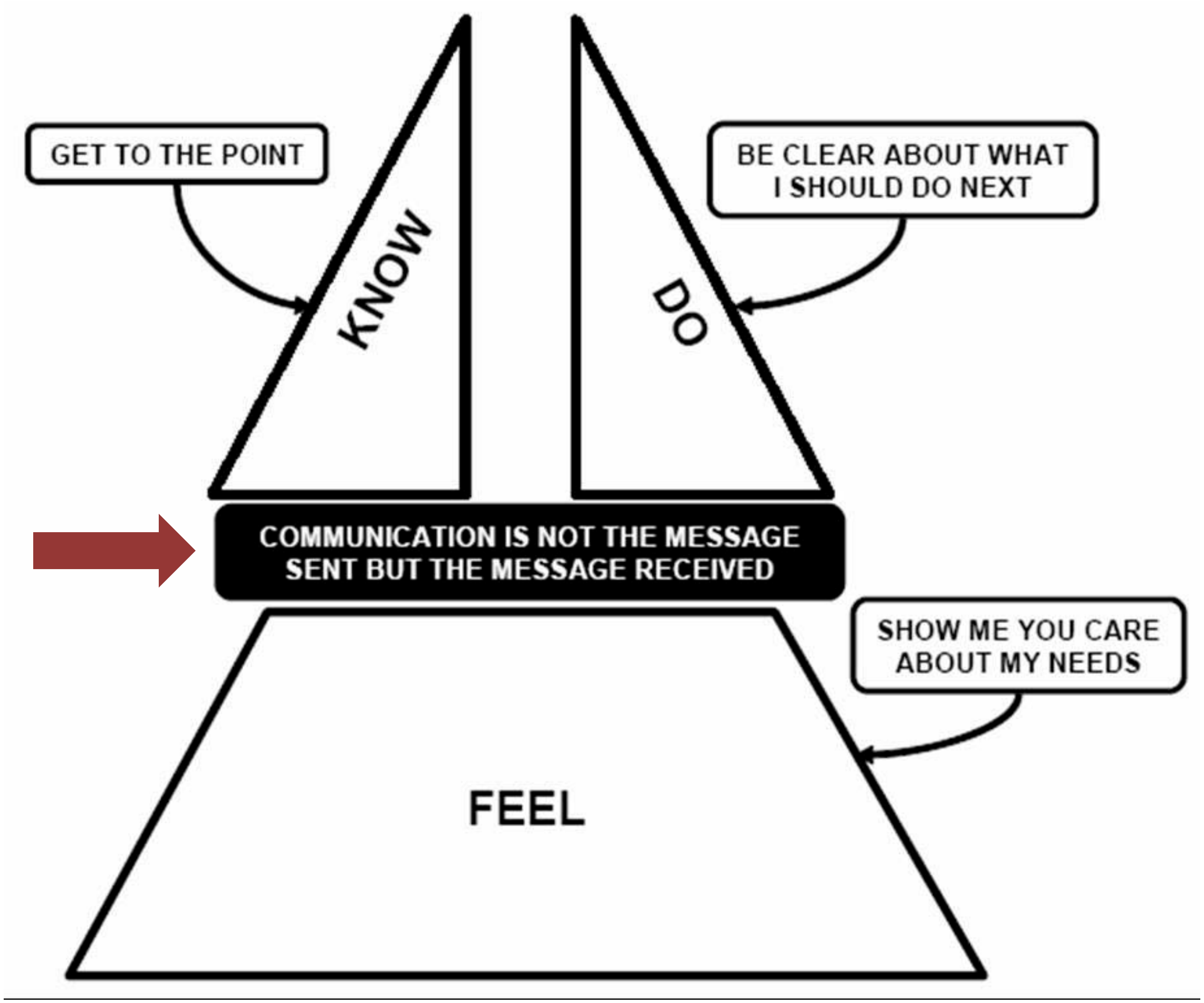
3. DO:

- **“What do I want people to do as a direct result of my communication?”**

Ideally, your answer should be no longer than one sentence. Write it down.

Know, Feel, Do: Bottom Line of Communication

Tailor your communications to the needs of the *receiver*.



Thank you!