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 Leadership Team (BOLT)
- Bus Ops Monthly Meetings (2Ms)
- Operating Group
- Lead Administrators Exchange and Dialogue (LEAD)
- Yale School of Medicine Monthly Meeting
- Business Operations Community Meeting (BOCM)
- AP-SIG
- EMS-SIG
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)
The BOLT is...

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

APPOINTED BY:
Vice President for Finance & Business Operations

CHAIRLED BY:
Assistant Vice President for Business Operations
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
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<th>Bolt Liaison</th>
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<td>Controller’s Office</td>
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<td>Office of International Affairs</td>
<td>Don Filer</td>
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<td>Office of Public Affairs &amp; Communications</td>
<td>Hellen Hom-Diamond</td>
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<td>Office of Risk Management</td>
<td>Sal Rubano</td>
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<td>Office of Sustainability</td>
<td>Julie Newman</td>
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<td>Organizational Effectiveness</td>
<td>Elena DePalma</td>
<td>Jack Beecher</td>
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<td>Procurement</td>
<td>John Mayes</td>
<td>Holly Piscatelli</td>
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<tr>
<td>Research Administration</td>
<td>Andy Rudzynski</td>
<td>Cynthia Walker &amp; Carrie Capezzone</td>
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<td>Student Financial &amp; Admin Services</td>
<td>Ernie Huff</td>
<td>Brian Rebeschi</td>
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<tr>
<td>Yale Shared Services</td>
<td>Ronn Kolb ash</td>
<td>Holly Piscatelli</td>
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The Operating Group is...

- 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
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](http://yalebiz.yale.edu/meetings/busops-planner)
Communication Standards

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

Go To: http://www.yale.edu/fin-bus/businessops/standards.html
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.
Tailor your communications to the needs of the receiver.
Thank you!