

Organizational Alignment: Main & HSC

A. INTRODUCTION

1. Challenging project due to:
 - a) Complexity of the organizational structure with academic and health organizations
 - b) Financially challenging environment
 - c) High level positions and often high performing, critical to each organization
 - d) Lack of clarity in reporting/supervisory relationships
 - e) Partial reporting relationships across numerous supervisors
 - f) Inaccurate job descriptions, sometimes due to roles and responsibilities evolving based on skills and interest of employees.
2. Context: A recent change by the Board of Regents reconstituted the HSC Board of Directors and made the UNM President ultimately responsible for both Main Campus and HSC.
3. Project Objective: To determine how Strategy, Communications & Marketing, and Finance can operate as “One UNM” to a greater extent moving forward.

B. ESTABLISHING CURRENT STATE

1. Population: Strategy Positions (7), Communications & Marketing (4), and Finance (11)
2. Data Collection:
 - a) Individual interviews
 - b) Detailed role profiles
 - c) Spans and layers (Comm/Marketing & Finance)
 - d) Customized follow up questions
 - e) Ad hoc interviews with ISS, Government Relations, and UNM Hospital
 - f) Executive interviews with President, Chancellor, Provost and Executive VP

C. SUMMARY STRATEGIC PLANNER POSITIONS (7)

1. Positions – agreement from Executive Leadership
 - a) Strategic planners leveraged advanced skills to deliver significant accomplishments.
 - b) Going forward strategic planners can achieve even more with increased position clarity: titles, descriptions, org charts, and supervisory responsibility.
2. Governance – agreement from Executive Leadership.
 - a) Align and coordinate with tight integration of leadership and organizational alignment
 - b) From a governance perspective use a five step process to clearly define a system wide Strategic Governance Council and Charter.
3. Structure Changes – from Aon
 - a) Strategic Planner to Provost – retitle the position and standardize the functions/responsibilities of the team reporting to this position. Look for opportunities to automate, standardize and manage demand.
 - b) Chief Strategic Advisor (18) to Chancellor – better alignment by changing reporting structure of the HSC web and communication positions to HSC Exec Dir of Comm/Marketing. Appropriate retitling to Strategic Planner (16).
 - c) Chief Strategic Advisor (18) to Executive Officer Finance & Administration – streamline support of Government Relations by moving this position under Main Campus Government Relations;

however, should remain focused on HSC initiatives. Recommend retitling to a Legislative Analyst (Gr 16).

- d) Strategic Planner to Law School – needs further evaluation with similar positions in other colleges. Recommend no title change at that time but further evaluation to ensure better alignment across academic units.
- e) Establish a single strategic lead over all strategic functions across both campuses. Based on existing skill set this may be an internal promotional opportunity and not require a new position.

4. Structure Changes – from Executive Leadership

- a) *Strategic Planner (16) to Provost – agree with the recommendation to retitle the position at the same grade and salary but to better reflect primary duties of this position. All current responsibilities of this position will remain within the Provost Office but may be reassigned internally.*
- b) *Chief Strategic Advisor (18) to Chancellor – agree with the recommendation regarding change in reporting of web and communications to HSC Exec Dir of Comm/Marketing. Recognize a need to retitle this Strategic Planner more appropriately to an Executive Project Director (Gr 17) with no change in pay or reporting structure.*
- c) *Chief Strategic Advisor (18) to Executive Officer Finance & Administration – eliminate current position and laterally transfer incumbent into Chief Budget & Facilities Officer/HSC (Gr 18) with no change in pay. Position will support UNM Government Relations, as needed with HSC initiatives.*
- d) *Strategic Planner (16) to the Law School – executives agree with recommendation.*
- e) *Establishing a single strategic lead responsible for oversight of all existing strategic responsibilities needs further evaluation to determine how this is achieved with no additional cost or decrease in service to senior level positions.*

D. SUMMARY COMMUNICATIONS & MARKETING

1. Governance – agreement from Executive leadership

- a) For web scope a committee focused on brand standards, unique requirements, and IT platform using a three step approach: share information, define standards, and improve results.
- b) Once web committee is fully established, it can expand into a broader communications and marketing scope.
- c) Media relations should be seamlessly integrated into Communications & Marketing.

2. Structure Changes – from Aon

- a) The Director of Media Relations should report to Chief Univ Mktg & Comm Officer.
- b) A lead over two similar Communications & Marketing departments to ensure consistent messaging across both entities.

3. Structure Changes – from Executive Leadership

- a) *Director of Media Relations – agree with new reporting structure of the Director of Media Relations to Chief Univ Mktg & Comm Officer. This change, in addition to changes in reporting of the web and communications staff from HSC Chief Strategic Advisor to the HSC Exec Dir of Comm/Marketing will result in better alignment and more similar organizational structures.*
- b) *Support the concept of a single lead over both Communications and Marketing functions; however, concerned with creating a new VP title. Alternative is to form a Communications Committee with co-chairs operating under the oversight of the Chief of Staff to the President.*
- c) *Additional recommendation – retitle the two highest level positions to a new title at the same grade (17). This change will result in an increase in pay for the current Chief Univ Mkt & Comm Officer and a decrease in pay for the current Ex Dir, Comm & Mktg/HSC effective July 1, 2017.*

E. SUMMARY FINANCE POSITIONS

1. UNM has achieved significant integration in Finance across Main Campus and HSC. Ten (10) financial functions already integrated under the oversight of the Controller.
 2. Outsourcing opportunities should be evaluated knowing that transactional areas are top candidates for outsourcing. Agreement from Executive Leadership; however, this needs additional review and discussion with detailed cost analysis.
 3. Structure Changes – from Aon
 - a) Budget function:
 - o Better align by creating a single lead to oversee both budget areas and reporting to Executive VP for Administration; or
 - o Chief Budget & Facilities Officer can be separated into two functions with the budget function reporting to Chief Financial Services Officer and creating a lower level position focused on HSC Capital projects but reporting to ISS.
 - b) Retitling of Executive Project Director at Main Campus (Grade 17) to University Treasurer (Grade 17) same pay. Working titles for other main campus finance positions to better define their roles/responsibilities as they relate to “system” support.
 - c) Evaluation of Executive Officer Finance & Administration for better alignment with senior level finance position, the University Controller with main campus.
 4. Structure Changes – from Executive Leadership
 - a) *Budget function: Internal transfer of Chief Strategic Advisor (Grade 18) to the Senior Exec Officer/HSC to Chief Budget & Facilities Officer (Grade 18) position with no change in pay. Position will provide support to Government Relations Office for HSC initiatives.*
 - b) *Retitling of Executive Project Director (Grade 17) at Main Campus to University Treasurer (Grade 17) same pay. Working titles for other main campus finance positions to better define their roles/responsibilities as they relate to “systems”.*
 - c) *Evaluation of Executive Officer Finance & Administration salary for better alignment with senior level finance position, Controller, at main campus. In order to ensure enhanced communication and coordination, this position will have a dual reporting relationship to the Chancellor and the EVP for Administration.*
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F. IMMEDIATE COST SAVINGS FROM REALIGNMENT

- Eliminate Chief Strategic Advisor (Gr 18): (\$152,000)
 - Eliminate Marketing and Media Director/HSC (Gr 16): (\$88,807)
 - Eliminate Assoc VP, Planning, Bdgt & Analysis (Gr 18): (\$174,620)
 - Reduction in pay for Exec Officer Finance and Admin (Gr 99): (\$25,136)
 - Reduction in pay Ex Dir, Comm/Marketing Dir/HSC (Gr 17): (\$5,000) (effective July 1, 2017)
 - Increase in pay for Chief Univ Mktg & Comm Officer (Gr 17): \$5,000
 - Internal transfer Chief Budget & Fac Officer/HSC (Gr 18): (\$7,806)
 - Recurring Savings: (\$448,369)
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G. GOING FORWARD STRENGTHS

1. The Regents are supportive of a transformational agenda
2. A “One UNM” strategy leverages the best across the university
3. There are strong strategists on Main Campus and HSC
4. Marketing has strong potential to develop brand and web presence
5. UNM is making strong progress to unify Main Campus and HSC
6. The finance function has achieved strong centralization

H. SUGGESTED NEXT STEPS

1. Evaluate recommendations and options across each of the areas: Strategy, Communications & Marketing, and Finance
2. Determine desired organization structure for each one then establish reporting lines, titles and salaries based on leveling of roles regardless of entity
3. Confirm no opportunities to standardize or optimize within the finance function
4. Evaluate the cost/benefit for outsourcing some aspects of finance
5. Continue formal evaluation of other areas for consolidation and alignment, such as Policy Development, Safety and Risk, and Academic Officers in the colleges

I. DETAILED PRESENTATION FROM AON IS AVAILABLE

On President Frank's website at <http://president.unm.edu/administrative-function-review/index.html>