Financial Services Process-Change Communications Guidelines

Presented by:
Shirley Mitchell

July 24, 2009
Theme for the day

- The only thing constant is change!
History

Communication sub-committee formed

- CATR initiative
- Improve communication with our customers
- Members included:
  - HSC Representatives
    - Core office and departments
  - Main Campus Representatives
    - Core office and departments
  - Branch Campus Representatives
    - Department personnel
Recommended Guidelines

Financial Services will use the following guidelines when:

- Creating a new process or procedure
- Enhancing or changing an existing process
- Clarifying an existing policy or procedure
Guidelines, cont’d

- A “process owner” must be identified
  - Responsible for coordinating any written or oral communications

- Written communication
  - Sent to appropriate audience at least 30 days prior to intended effective date
  - Include date(s) and location(s) of future public explanations
  - Brief statement of the rationale for the change
Guidelines, cont’d

- Presentations
  - Appropriate to the subject content
    - FRSWG Ed Sessions (held at HSC)
    - FANG Meeting (held at MC)
    - RAN Meeting (held at MC) and/or
    - Topic-specific workshop or lab (varies)
Guidelines, cont’d

- Transition or grace period
  - At least 30 but not more than 60 days
  - When possible
- Written communication (slide 5) and Communication plan (slide 6) must be reviewed and approved by Executive Finance Leadership team prior to implementation
Guidelines, cont’d

- Policy-related communications
  - Distributed to campus by FSSC
  - When possible
Guidelines, cont’d

- Exceptions to these guidelines
  - “Effective immediately” or Less than 30 days
    - Only when absolutely necessary
    - Only with the VP’s approval
    - Other guidelines should be met to the extent possible