
Financial Services Process-Change Communications Guidelines

Presented by:

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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 p/p
- 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