

Business & Finance Administrative Guide for Organizational Change



University of Michigan
B&F Leadership Academy

Last Updated 8/13/2014

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Introduction

Many administrative changes are required when departments decide to restructure or re-align existing units or programs. Changes such as customer notification, financial reporting structure, relocation of people and/or equipment (including facility changes or additions), and management of technical support systems are necessary when realignment or restructuring of departments/units occurs. There is currently no central location of available resources where tasks and/or functions are collectively documented to assist with these types of transitions or changes.

The University of Michigan Business & Finance Leadership Academy sponsored a project team whose charge was to create a guide to assist units when facilitating department organizational changes. This document will serve as a guideline containing a collection of tasks and their resources, including helpful websites, email and telephone contact information.



There are different types of department organizational change. Here are some examples of past changes within the University:

- Merger (**MAIS/ITCS/ITSS becomes ITS**)
- Splitting one department into two or multiple departments (**Engineering, Biology**)
- Creating new departments or programs (**future – Bio-Informatics in the Medical School**)
- Closing departments (**MStores**)
- Creating a new school/building (**Gerald R Ford School of Public Policy**)
- Moving/absorbing a department or unit into a different reporting structure (**Center for Statistical Consulting and Research**)
- Department relocation/ move (**MHealthy from South Industrial to Wolverine Tower**)
- Departmental name change (**HRAA to UHR – University Human Resources**)

Department organizational changes result in administrative tasks from moving employees to notifying vendors and customers, regardless of the reason. This guide is designed in three tiers – the first tier lists the major areas of change, the second tier lists the associated tasks in those areas, and the third tier lists resources to help accomplish the tasks.

How to Use This Guide

This guide is organized by three key steps, each in a checklist format which can be used as a project plan to guide you through the applicable tasks. This is a Word document which can be edited and saved for your specific use, i.e. you may check the items that apply and delete the sections to create a customized plan.

This guide is intended to be used as an online tool. However, if one wants to print, it may be helpful to refer to the table of contents to find the page numbers for each service area and its related tasks and resources.

The first checklist shows the major services areas and links you to associated tasks in that area. The second checklist (tier two) describes the tasks by major service area, and links you to the third checklist (tier three) of applicable resources for each task.

1. [Major Service Areas](#)
2. [Tasks by Major Service Area](#)
3. [Resources by Major Service Area](#)



[Appendix A](#) is an ordered outline of the major service areas and related tasks that can also be used as a resource for those who may be familiar with reorganizations but want a list as a quick reminder of the tasks that need to be accomplished.

Tell us about your experience using the guide. Click on the link below to take a quick survey giving your input and suggestions for the guide.

 [Guide Survey](#)

Major Service Areas - below is a list showing the areas where administrative tasks may occur as a result of an organization change. This list is intended to help you think about what types of changes are needed – by clicking on the link it will move you to a list of associated tasks for that area.

☑	Do you have changes in the area listed below?	Description & Examples of Changes in This Area (click on the link to see the detailed tasks for each area)
	Human Resources	<p>There may be new or changed job functions, changes in the persons responsible for time reporting or reports, and appointment changes.</p> <ul style="list-style-type: none"> • Time reporting approver or report recipient • Job classification/descriptions
	Financial	<p>There may be a need to activate or inactivate deptids, change organization groups, move funding, etc.</p> <ul style="list-style-type: none"> • Chartfield establishment or modifications • Coordination of all business transactions incorporating organizational change
	Academic/Research	<p>There may be a need to add a research component, new curriculums, or inter-disciplinary programs.</p> <ul style="list-style-type: none"> • Academic unit additions or changes • Research unit additions or changes
	Facilities & Operations	<p>There may be additions or changes in the employee work spaces including offices, conference rooms, and research labs.</p> <ul style="list-style-type: none"> • Renovation and changes in physical space • Relocation of employees and/or furniture & workstations • Utility, technical or fixed Infrastructure system changes or additions • Services for maintenance, grounds, building services, and OSEH
	Information Technology	<p>There may be new hardware or software requirements for workstations, shared spaces.</p> <ul style="list-style-type: none"> • Additions/changes to phones & voice mail • Additions/changes to hardware/software (computer servers/monitors, printers) • Access to all applicable systems (email, internal systems, M-Pathways) • Updates to web sites – branding, links, contact information
	Office Administration	<p>Communication with the employees affected is important throughout the entire change process.</p> <ul style="list-style-type: none"> • Collaboration efforts • Communication • Staff changes • Notifications
	Development	<p>Changes in donors requests and agreements.</p> <ul style="list-style-type: none"> • Communication • Collaboration

Service Area - Tasks: Human Resources

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Department IDs		Restructure (Authorizer /Approver /Organizational Manager of Division)	Employee/job record changes and the personnel recipient, supervisor ID and department manager records may all need to be updated.	UHR Records & Info Services	
Staff HR Changes		Job Classifications/ Descriptions	Job classification and/or description changes may be required due to new or different jobs and functions.	UHR Staff HR	
		Student Employees	Extra tasks for student employees due to the reorganization of the regular employees may result in a shift in workload hours and responsibilities.	UHR Staff HR	
		Bargaining Unit Employees	Changes that may affect an employee's job function, employee/benefit status are often negotiated items and may require discussions with Staff Human Resources and union representatives prior to implementation.	UHR Staff HR	
		Temporary Employees	Changes in job responsibilities, workload, titles and pay may need to be updated.	UHR Temporary Staffing Services	
		Staff Appointments	The appointment percentage, the length of the appointment, etc. may need to be modified.	UHR Staff HR	
Academic HR Changes		Faculty Appointments	The appointment percentage, the length of the appointment, etc. may need to be revised. Faculty may also have joint appointments in different schools/colleges.	UHR Academic HR	
		Tenure Status	Changes in appointments due to organizational changes in schools/colleges may affect the tenure clock.	Provost Office Guidelines	
		Research Appointments	Additions or changes in research appointments possibly due to adding a research track.	UHR Academic HR	
		Bargaining Unit Employees	Changes that may affect an employee's job function, employee/benefit status are often negotiated items and may require discussions with Staff HR and union representatives prior to implementation.	UHR Academic HR	

Service Area - Tasks: Financial

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Understanding A Unit's New Business Process and Goal(s)		Establishment of New Department Chartfield	Financial Reports requires that the Department Maintenance Form be submitted via campus mail, fax, or a pdf format with appropriate departmental approval(s). Depending on each unit's business need, it may be possible that a new or change in program may needed instead of or in addition to be a new department.	Financial Reports	Financial Reports sends all appropriate business owners a monthly email communication of all newly created chartfields based on feedback from the unit in determining effective date of the change in relation to fiscal year
		Changes to Department Chartfield	Financial Reports requires that the Department Maintenance Form be submitted via campus mail, fax, or a pdf format with appropriate departmental approval(s).	Financial Reports	This process is necessary when the official name is modified or is moving to another reporting structure.
		Inactivate Department Chartfield	Financial Reports requires that the Department Maintenance Form be submitted via campus mail, fax, or a pdf format with appropriate departmental approval(s).	Financial Reports	This process is necessary when the department is being closed or absorbed by another reporting structure.
Modifications based on new department establishment, change/move in department, or inactivation		Short Code Establishment (The short code is the unique mapping of a string of chartfields)	A unit may need to submit the Request for New or Change in Existing Shortcode Form to allow for all applicable transactions to post on the monthly Payroll Register, Aid Disbursement Detail, Voucher Detail Report (M-marketsite and Concur) and Statement of Activity.	Accounting Services- Customer Service Sponsored Programs Payroll	
		Chartfields changes (Project Grants)	A unit may need to submit the Establish New or Modify Existing Project Grant Form to ensure all financial, procurement, payroll, inventory, and student transactions reflect the proper unit's assignment.	Accounting Services- Customer Service Sponsored Programs	This should be processed along with the New or Change in Existing Short Code Form.
		Chartfields changes (Programs)	A unit may need to submit the Request for New or Change in Existing Program Form via campus mail, fax, or a pdf format.	Financial Reports	This could be necessary if there is a need for further segregation of activity within a departmental group.

	Chartfields changes (Funds)	A unit may need to route the Request for New or Change in Fund Form to ensure all financial, procurement, payroll, inventory, and student transactions reflect the proper unit's assignment.	Accounting Services- Customer Service	This should be processed along with the New or Change in Existing Short Code Form
	Student Financial Item Type	Each unit is encouraged to contact Student Financials to receive assistance with terminating the old item type and creating a new one to reflect the proper unit's assignment on all future student activity in the Student Financials database.	Student Financial Services	Each unit is informed that all open item type should reflect the change in department at the time the Request for New or Change in Existing Short Code is routed.
	Asset Management System	The Asset Management System is updated with the proper department assignments based on journal activity reflected in the financial general ledger for capitalized items	Accounting Services- Reporting	In the event that there is an oversight of transferring activity in the general ledger, a unit's inventory inquiry will also validate the proper unit's assignment.
	Transferring fiscal year activity	Accounting Services and Sponsored Programs will inquire if any prior statement of activity detail (payroll, student, financial, and procurement) requires movement to the newly created department and will transfer activity via journals.	Accounting Services - Customer Service Sponsored Programs	The unit is reminded to modify all open purchase orders and notify Market site, Service Units and E-procurement vendors if new short codes are created reflecting the new department. This will avoid the need for journals moving activity to the newly created department.

Service Area - Tasks: Academic/Research

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Research		Establishing or changing school/college research structure	School/college/business units may want to add/change research in their organization.	Office of Vice President for Research (OVPR) Research Administration	
Faculty		Establishing or changing school/college academic structure	School/college/business units may want to add/change academic structure, i.e. division becomes a school.	Provost Office	
		Establishing or changing faculty appointments	Guidelines about faculty appointment processes should be reviewed.	Faculty Appointment Guidelines	
Students		Undergraduate student records may require changes.	There may need to be modifications to student records based on academic organization changes.	Registrar	
		Graduate student records may require changes.	There may need to be updates to student records based on academic organization changes.	Rackham	
Reporting		Changes to the budget and related reporting may be needed.	There may be budget considerations that require advice from the provost office prior to implementation.	Office of Budget & Planning (OBP)	
Curriculum		Changes to curriculums & course offerings.	There may be new or changed curriculums and related course offerings.	Registrar	

Service Area - Tasks: Facilities & Operations

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Renovation/ Changes in Physical Space		Determine if changes need to follow capital project guidelines	You may need to submit a capital project proposal depending on the estimated total cost.	Provost Space Utilization Initiative – Capital Project Guidelines – Cost Criteria	
		Review space guidelines Obtain regental approval	The space guidelines help units work through the capital approval process for office space, food services, and classroom utilization changes or additions.	Provost Space Utilization Initiative – Capital Project Guidelines	
		Work estimates, work orders for construction services	Plant Operations Construction Services offers many physical space services such as signs, painting, etc.	Plant Operations Construction Services	
Relocation -Employees -Furniture -Workstations		Create a checklist of all the tasks associated with the move. May include furniture, workstations, and equipment.	There is a moving checklist available to help you determine which tasks that are applicable to your organizational change	UM Moving Guide and Helpful Hints	
		Relocation of furniture, workstations, and equipment	Some organizational changes will require the physical relocation of workstations and/or other physical university assets.	Plant Operations Material and Moving Services	
Utility, Technical or Fixed Infra-Structure System Changes or Additions		Align End-User Needs with Building Systems, i.e., Servers, UPS, Mechanical, Electrical, water, etc.	Confirm fixed building systems are adequate for the intended use.	Plant Operations Utilities & Plant Engineering	
Grounds, Maintenance, Building Services, and OSEH		Identify requirements or need for university provided services	Align available facility related services with the needs of the end-users under the proposed organizational change.	Plant Operations Building & Grounds Services	

Service Area - Tasks: Information Technology

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Telephone Services		Order, change, and cancel telephone services, and order telecommunications equipment and accessories	For routine orders (under 10 items), use the ITCOM OSC Orders website. It will guide you through the ordering process to ensure that your order contains the information needed for quick processing.	ITCom Online Service Center Orders Website	
		Handle Large or Complex Orders	If you need to order more than 10 of a particular item, or if your order will require collaboration among ITCOM and other University units, such as Plant, or external vendors, please contact the ITCOM Project Manager for your school, college, or unit.	ITCom Project Manager	
		ITCOM billing updates	Make Changes to Existing MRC Chartcoms. Existing phone lines have already been assigned chartcoms for monthly recurring charges (MRCs), long distance charges, and local calling charges.	ITCom Billing Group	
Voice Mail Service		Order or make changes to voice mail service	Two voice mail services are available to University faculty and staff, UM Voicemail and Exchange Voicemail.	ITCom Voicemail	
Shared directories		Changes with computing accounts, subscriptions, usernames, passwords, and billing inquiries regarding ITCS services (including U-M Online).	You can manage your personal directory information and e-mail forwarding in the U-M Online Directory. Select the "Bind" option to make changes to your directory entry. For more information, see The U-M Online Directory Via the Web: Finding and Changing Your Personal Entry	ITS Access Services	
Employee Information in M-Pathways		Update employee information in M-Pathways	Employees can update personal information using the Self-Service function on Wolverine Access.	M-Pathways Self-Service	
New or Change in Hardware/ Software		Evaluate if new computer hardware or software will be required (Computers, Servers, Monitors, Printers)	The local IT Administrator would most likely coordinate activities with the applicable areas to make these type of changes.	Local IT Administrator	
Access to applicable systems (email, internal systems, M-Pathways)		Update employee access to applicable systems	Access to campus administrative systems, such as M-Pathways, is managed by Information and Technology Services (ITS).	ITS Access Services	

Modifications of Email groups; email system		It may be necessary to update any email groups that previously existed to reflect the department change.	If you need to establish new email service, visit the ITCS e-mail Resources page to find out about several e-mail alternatives. (Some departments have Exchange, in which case you need to talk to your department's IT staff.)	Managing Your Membership in U-M Online Directory Groups	
Supplemental Systems		Understanding supplemental systems not supported by MPathways Financial, Student, HR, Research, Procurement Modules	Supplemental systems are usually managed by local IT professionals within each department.	Local IT Administrator	
Audio/Visual and Networking Changes		Evaluate if new audio/visual equipment will be required	Review departmental needs for conference room projectors and wireless hubs.	Local Facilities Administration	

Service Area - Tasks: Office Administration

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Collaboration Efforts		Contact central offices for information and advice in all applicable areas	Each business unit should initiate contact with one of the central offices (Human Resources, Financial Reports, or the Office of Budget and Planning) to streamline their organizational change. These central offices will provide advice on additional approvals that may be required (regental approval for faculty).	Major Service Areas	These central offices will direct units to the formal paperwork that needs to be completed to initiate the official change. Central offices will verify whether a memo of understanding for a merger should be obtained from the Provost Office.
		Route paperwork for all staff to reflect department change	Each business unit will need to route appropriate paperwork to Human Resources reflecting the new or change in department for all current staff or new hires. An electronic file is commonly accepted for massive staff or faculty changes.	Human Resources	
		Modify financial system information (Procurement, Student)	Each unit is responsible for providing and updating the proper information for all M-Pathways modules. Once departmental information is created or modified, all outstanding purchase orders will need to be updated. All systems derived from short code processing will need to be reviewed to ensure the proper value is being utilized. Each unit should collaborate with Student Financials to verify that all relevant information is current for item types.	Financial	Each unit should inform internal parties assigned with the administrative duties of processing cash receipts, journals and vouchers (po and non-po) that a modification was made to the chartfields. Each unit will also need to communicate with Contract Administration if any subcontracting payment changes.
Communication Plan		Conduct open house or staff retreats to introduce new process or discuss process change using communication planning tools.	It is beneficial for staff morale if an open house or staff retreat is coordinated to introduce a new process, discuss the process change, and the need for the change.	Change Management Tools Communication Plan	It is effective when staff is involved in departmental changes.
		Change mail distribution	The administrative assistant for each unit should work with their mail service's operation in creating a timeline, as well	Mail Services	

			discussing the best alternative for rerouting and stopping any mail distribution for all staff during the physical relocation. The unit may also need to work with central mail services if there are new addresses, etc.		
		Modify office materials (Business cards, letterhead, envelopes, brochures, logos)	All documents used for written communication may need to be changed.	UM Printing Services	
		Create/modify procedure manual, policies, and/or staff handbooks	Units may have internal policies and procedures that require revision.		
Employee Information		System address and telephone changes	Each unit should submit the "Address/Personal Data Form" to Human Resources for all phone and address informational changes. This form is directly correlated to the campus phone directories and online directory (X-500). The online directory is reflected with changes each 12th work day of the month.	Change Form	
		Update On-Boarding and Off-Boarding Checklists	Each unit may have internal documents on their intranet or shared drive that may require updates.		
		Access and connectivity to relevant servers, systems and email groups; new hardware/software.	There may be changes to email groups (x-500), internal shared directory structures, additional workstations, printers, etc.	Managing Your Membership in U-M Online Directory Groups Local IT Administrator ITS Access Services	
		Evaluate roles and responsibilities of staff (possible retraining).	This is mainly an internal task where office administration will have the best contacts for training. Some internal sources include MYLinc, HRD and ITSC classes.	HRD Classes ITCS Classes MY Linc	
		Pack/unpack office materials	Physical movement of employees may require packing and unpacking of office supplies, computers, etc.	UM Moving Guide and Helpful Hints	
Notifications		Notify external customers and vendors about the changes.	Units may need to contact customers and vendors regarding delivery address changes, contact changes, etc.		There may be interfaces that need updates, delivery addresses that have changed, marketing resources that need to be

					modified.
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Service Area - Tasks: Development

Change Type	<input checked="" type="checkbox"/>	Tasks	Task Description	Resource	Notes
Collaboration Efforts		Contact Office of University Development (OUD) when changing department IDs	Contact Gift and Records Administration (GRA). Contact Reporting and Information Analysis (RIA)/Data Management	umgift@umich.edu oud-ria@umich.edu	(734) 647-6179

Service Area - Resources: Human Resources

(Click the [link](#) to return to Human Resources Tasks)

<input checked="" type="checkbox"/>	Resource	Resource Description	Website (url)	Contact	Telephone
	UHR Records & Information Services	Responsibility for all data entry in M-Pathways and can provide spreadsheets to facilitate large volume job, appt, and DBE changes	http://hr.umich.edu/hrris/	ssc.hr.alternative.process@umich.edu	(734) 764-9250
	UHR Staff HR	Staff HR Services serves the University, its management and diverse staffs in the development, implementation, interpretation and administration of human resources policies, procedures, practices and external regulations related to labor/staff relations, salary administration, Compensation and Classification, and overall University Human Resources functions.	http://hr.umich.edu/staffhr/	UniversityHR@umich.edu	(734) 763-2387
	UM Temporary Staffing Services	Gateway for obtaining temporary staff assistance.	http://www.hr.umich.edu/temps/hireone.html	temps@umich.edu	(734) 763-5740
	UHR Academic HR	Academic HR administers and provides consultation related to programs, policies & procedures for Instructional & Primary faculty as well as Graduate Student Instructors, Graduate Student Research Assts & Graduate Student Staff Assts.	http://hr.umich.edu/acadhr/	AcademicHR@umich.edu http://hr.umich.edu/acadhr/contact.html	(734) 763-8938
	UHR Staff HR Bargained For	Staff HR is also responsible for union contract issues and processes for staff employees	http://hr.umich.edu/staffhr/contracts/index.html	UniversityHR@umich.edu	(734) 763-2387
	Academic HR Bargained For	Academic HR is also responsible for union contract issues and processes for academic employees.	http://hr.umich.edu/acadhr/contracts/index.html	AcademicHR@umich.edu	(734) 763-8938
	Tenure Status	Provost Office Guidelines for Tenure Clock and Other Related Matters	http://www.provost.umich.edu/faculty/tenure_review/policies.html	provost@umich.edu	(734) 764-9290
	Academic HR Research	Guidelines for research appointments	http://www.drda.umich.edu/policies/um/RF/RFguidelines.html	AcademicHR@umich.edu	(734) 763-8938
	Health System Bargained For	Provides the contract language for the various bargaining units in the health system.	http://www.med.umich.edu/umhshr/supervisor/bargaining-agreements.html	http://www.med.umich.edu/umhshr/about/contact.html	(734)936-4000
	UHR Manager's Toolkit	Provides information about processes, procedures, forms and contacts relating to employee management.	http://hr.umich.edu/toolkit.html	UniversityHR@umich.edu	(734) 763-1284
	UHR Forms	Lists all the online forms for employee management.	http://hr.umich.edu/hrris/forms/	UniversityHR@umich.edu	(734) 764-9250

Service Area - Resources: Financial

(Click the [link](#) to return to Financial Tasks)

☑	Resource	Resource Description	Website (url)	Contact	Telephone
	Financial Reports	<p>The Financial Reports provides information and resources for the internal and external financial reporting needs of the University community, specifically management reporting at the department level. They provide Mpathways access through Organization Security via the Online Access Request System (OARS), which allows transaction processing within the Financial, Human Resource, Procurement and Student modules. Financial Reports collaborates with various units:</p> <p>Human Resources: obtain approval for establishment of new department and verifies that regental approval was acquired for faculty appointments.</p> <p>Cost Reimbursement Office: assess the impact on effort certification.</p> <p>ITS: inform of any reporting structural changes within the unit that will impact future business processes, queries and reports.</p>	http://www.finops.umich.edu/reporting	Chartfield-Maintenance@umich.edu	(734) 647-3767
	Accounting Services	Accounting Services provides information and resources to assist University units with understanding and recording financial transactions.	http://www.finops.umich.edu/accounting	AccountingServicesCustomerService@umich.edu AccountingServicesReportingArea@umich.edu	(734) 647-3773
	Sponsored Programs	Sponsored Programs manages the post-award activities of the University of Michigan's research enterprise and other sponsored activities. Any changes that affect Sponsored Programs should be coordinated with the appropriate representative in the Division of Research and Development Administration (DRDA). These changes will be routed as a Project Award Change (PAC) to the respective customer service accountant to modify the applicable short codes and project grants.	http://www.finops.umich.edu/programs	spnprogcustserv@umich.edu	(734) 647-1946
	Student Financial Services	Student Accounting manages student account billing and collection.	http://www.finops.umich.edu/student	um-sfo@umich.edu	(734) 764-7447

	Payroll	Payroll provides information and resources about all aspects of the payroll process from reporting time to viewing paycheck data.	http://www.finops.umich.edu/payroll	Payroll@umich.edu	(734) 615-2000 option 2
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Service Area - Resources: Academic/Research

(Click the [link](#) to return to Academic/Research Tasks)

<input checked="" type="checkbox"/>	Resource	Resource Description	Website (url)	Contact	Telephone
	Provost Office	Information about the academic and budgetary policies and activities at the University.	http://www.provost.umich.edu/	provost@umich.edu	(734) 764-9290
	Faculty Appointment Guidelines	Information on the extension of an offer and joint appointments for faculty and research	http://www.provost.umich.edu/faculty/appointment_guidelines/	provost@umich.edu	(734) 764-9290
	Office of Vice President for Research (OVPR)	Information about the research programs at the University.	http://research.umich.edu/	UMresearch@umich.edu	http://research.umich.edu/contact-us/
	Research Administration	Research administration at the University.	http://www.drda.umich.edu	UMresearch@umich.edu	(734)764-1185
	Registrar	Ensures the accuracy, integrity and security of the academic records of the University; and serves students, faculty, staff, alumni and the world-wide community.	http://www.ro.umich.edu/	http://ro.umich.edu/knowledgebase.php?ansid=1425	
	Rackham	Works with faculty, students and administrators to serve graduate students.	http://www.rackham.umich.edu/	http://www.rackham.umich.edu/about_us/contact_us/	
	Office of Budget and Planning (OBP)	Information about the budget process and helpful institutional reports.	http://sitemaker.umich.edu/obpinfo/home	obpcontact@umich.edu	(734) 763-9954

Service Area - Resources: Facilities & Operations

(Click the [link](#) to return to Facilities & Operations Tasks)

☑	Resource	Resource Description	Website (url)	Contact	Telephone
	Provost Space Utilization Initiative – Capital Project Guidelines – Cost Criteria	This table within the capital project guidelines assists areas with determining the process for physical space changes based on their total estimated cost. (page 3)	http://www.provost.umich.edu/space/capital/#guidelines	space.utilization@umich.edu	
	Provost Space Utilization Initiative – Capital Project Guidelines	This resource outlines the entire process from funding to construction for major physical space changes.	http://www.provost.umich.edu/space/guidelines/capital.html	space.utilization@umich.edu	
	Plant Operations Construction Services	This resource is a full service construction group.	http://www.plantops.umich.edu/construction/	http://www.plantops.umich.edu/construction/contacts.php	(734)936-0264
	UM Moving Guide and Helpful Hints	This is a comprehensive guide for planning and executing a move.	http://www.provost.umich.edu/space/resources/ <ul style="list-style-type: none"> • Select <i>Moving Guide</i> near the bottom of the page to download the PDF. 	space.utilization@umich.edu	
	Plant Operations Material and Moving Services	Moving and trucking is a full service moving organization and provide the resources to move desks, file cabinets, an office or an entire department.	http://www.plantops.umich.edu/pmms/mtr/		(734)764-2467
	Plant Operations Utilities & Plant Engineering	Mechanical and/or electrical engineering technical support is provided to the end-users to ensure building systems are adequate in supporting the units intended function.	http://www.plantops.umich.edu/utilities/		(734) 764-2492
	Plant Operations Building & Grounds Services	The department includes building services, grounds services, heavy equipment garage, landscape architecture, pest management and waste management services.	http://www.plantops.umich.edu/grounds/		(734)647-2059

Service Area - Resources: Information Technology

(Click the [link](#) to return to Information Technology Tasks)

☑	Resource	Resource Description	Website (url)	Contact	Telephone
	ITCom Online Service Center Orders Website	Online site to guide you through the ordering process to ensure that your order contains the information needed for quick processing.	https://blue.itcom.itd.umich.edu/UofM/WebObjects/OnlineServiceCenter	https://blue.itcom.itd.umich.edu/UofM/WebObjects/OnlineServiceCenter.woa/5/wo/gtVJPwpnj3tGtgULbY8hEw/0.9.9	
	ITCom Project Manager	<p>Project Managers are assigned to each U-M academic and non-academic unit (schools and colleges, and vice presidential areas). They help assigned units meet their departmental voice, video and data networking goals. Project managers can help with the planning and installation activities related to voice, video and data networks or systems. They are also available to advise a unit on the integration of their voice, video and data networking plans with its strategic goals, the University's IT strategic direction, and industry trends.</p> <p>Executive contacts work with and understand units at the strategic level so that ITCom can better understand and service their voice, video and data network needs and goals.</p>	http://www.itcom.itd.umich.edu/customer/projectmanager.html	http://www.itcom.itd.umich.edu/customer/projectmanager.html	
	ITCom Billing Group	The ITCom Billing Group is designed to assist departments in reconciling and identifying charges on monthly statements, providing departmental reports, and modifying existing chartField information.	http://www.itcom.itcs.umich.edu/billing/	ITComBill@umich.edu	(734) 763-2000
	ITCom Voicemail	Voicemail changes	http://www.itcom.itcs.umich.edu/voicemail/	http://www.itcom.itd.umich.edu/customer/	(734)763-2000
	ITS Accounts Office	The ITCS Accounts Office can assist with computing accounts, subscriptions, usernames, passwords, and billing inquiries regarding ITCS services (including U-M Online).	http://www.itd.umich.edu/accounts/	4HELP@umich.edu	(734)764-HELP
	ITCom Computing Services	ITS provides a guide that focuses on computing services that will meet many of your needs as a faculty member and/or researcher at the University of Michigan.	http://www.itd.umich.edu/frguide/general.php		
	ITS Access Services	U-M faculty or staff members can obtain access to the University's administrative data resources that pertain to the type of data and level of access (view	http://www.mais.umich.edu/access/accessprocess.html	4HELP@umich.edu	(734)764-HELP

		or update) they need to conduct University business.			
	M-Pathways Self Service	Individuals can also update information via Wolverine Access > Self-Service	http://www.itd.umich.edu/itcsdocs/s4380/ or wolverineaccess.umich.edu >Self-Service		
	Managing Your Membership in U-M Online Directory Groups	ITS provides a guide explaining how to become a member of e-mail groups in the directory and how to remove members from a group as well as other e-mail related information.	http://www.itd.umich.edu/itcsdocs/s4380/ http://umich.edu/computing_email.php http://www.itcs.umich.edu/e-mail/		
	Local IT Administrator	Many departments have staff responsible for system administration and desktop support.	Varies by department		
	Local Facilities Administrator	Schools/colleges and major departments have employees responsible for facilities administration.	Search M-Community for facilities to see listing of contacts		

Service Area - Resources: Office Administration

(Click the [link](#) to return to Office Administration Tasks)

☑	Resource	Resource Description	Website (url)	Contact	Telephone
	30005 Address/Personal Data Form	This form is used to change address and telephone information	http://hr.umich.edu/hrris/forms/allforms.html . <ul style="list-style-type: none"> Select 30005 Address/Personal Data Form 		(734) 615-2000 1-866-647-7657
	Change Management Tools	This website has great articles and tools including information about change management, communication, and problem-solving.	http://www.mindtools.com/pages/article/newPPM_82.htm		
	UM Printing Services	This resource can assist you with changing stationery, envelopes, and business cards.	http://mbiz.bf.umich.edu/	printingservices@umich.edu	734-764-6230
	Communication Plan	This is a form for planning communication for projects; it still may be helpful for planning communications relating to the change	http://www.mais.umich.edu/methodology/project-management/		
	Mail Services	Mail Services helps get the right message to the right person at the right time.	http://mbiz.bf.umich.edu/mailsvcs/index.htm	mailservices@umich.edu	(734)764-9227
	Training Services	There are many training systems and courses available within the University. Some main internal sources (HRD, MyLinc, ITCS) are listed here as a resource.	http://www.umich.edu/~hrd/programsandcourses/index.html http://wolverineaccess.umich.edu/ http://www.itcs.umich.edu/education/		

Service Area - Resources: Development

(Click the [link](#) to return to Development Tasks)

<input checked="" type="checkbox"/>	Resource	Resource Description	Website (url)	Contact	Telephone
	Office of University Development	Handling processing of gifts, working with donors and soliciting donations. Keeping the DART system updated with all donor information.	http://www.giving.umich.edu u/	umgift@umich.edu oud-ria@umich.edu	(734) 647-6179

Guide Outline – Appendix A

1. What type of change is your organization going through?
 - a. Merger (**MAIS**)
 - b. Splitting one unit into two or multiple units (**Engineering, Biology**)
 - c. Creating new departments (**future – bio-informatics in Med School**)
 - d. Closing departments
 - e. Creating new school/building (**Gerald R Ford School of Public Policy**)
 - f. Moving/Absorbing organization to a different reporting structure (**Center for Statistical Consulting and Research**)
 - g. Physical departmental move (**MHealthy from South Industrial to Wolverine Tower**)
 - h. Departmental name change
2. Is this change temporary or permanent?
3. Why is this change necessary?
 - a. Business process reengineering
 - b. Budget considerations
 - c. Restructuring
 - d. University driven initiatives
 - e. Improved reporting
4. Who needs to be communicated with/to regarding the change:
 - a. University Human Resources
 - b. Finance
 - c. Procurement Services
 - d. Provost Office
 - e. Office of the Vice President for Research
 - f. Registrar's Office/Rackham
 - g. Facilities & Operations
 - h. Information Technology (New ITCS/MAIS?)
 - i. Employees directly affected by the change (administration)
 - j. Customers (internal and external)
 - k. Vendors/Suppliers

Service Areas for Changes based on section 4 above – the main sections of the guide contain resources and contact information in each of the communication areas.

1. Human Resources

- a. Department IDs (Authorizer/Approver/Org Manager of Division)
- b. Staff Changes
 - i. Job classifications/descriptions
 - ii. Student employees
 - iii. Bargaining unit employees
 - iv. Temporary employees
 - v. Staff appointments
- c. Academic Changes
 - i. Faculty appointments
 - ii. Tenure status
 - iii. Research appointments
 - iv. Bargaining unit employees

2. Financial

- a. Understanding Unit's New Business Process and Goals
 - i. Establishment of new department chartfield
 - ii. Consult with Human Resources – Approval of New/Change in Departments

- iii. Collaborate with Cost Reimbursement Office – Best Practices for Effort Reporting
 - iv. Determination of change in relation to fiscal year (Beginning-July, Middle, End)
 - b. Modifications based on new department establishment, change/move in department, or inactivation
 - i. Short Code (Fund Areas and Sponsored Programs)
 - ii. Project Grant (Fund Areas and Sponsored Programs)
 - iii. Program (Fund Areas and Sponsored Programs)
 - iv. Fund (Endowment and Student Loan Funds)
 - v. Student Item Type (Student Financials)
 - vi. Asset Management System & AEC Tracking (Plant fund)
 - vii. Transferring applicable fiscal year activity (Unit)
 - 1. Modify open purchase orders
 - 2. Notify Marketsite, service unit and E-procurement vendors.
 - 3. Update pending wire transactions
 - 4. Inform internal parties responsible for processing future cash receipts, journals, & purchase order and non-purchase order vouchers
 - 5. Inform Contract Administration of any subcontracting payments changes
- 3. **Academic/Research**
 - a. Research – establishing or changing research structure
 - b. Faculty – establishing or changing academic structure
 - c. Students – undergraduate or graduate student changes
 - d. Reporting – changes to the budgeting process and/or related reporting
- 4. **Facilities and Operations**
 - a. Renovation/changes to physical space – capital project guidelines; work estimates and order
 - b. Relocation of employees (furniture, workstations)
 - c. Utility, technical or fixed infrastructure changes (servers, etc.)
 - d. Grounds, maintenance and building services
- 5. **Information Technology**
 - a. Telephone services
 - b. Voice mail service
 - c. Shared directories
 - d. Employee information in M-Pathways
 - e. Access to all internal systems
 - f. Modification of email and groups
 - g. Supplemental systems
 - h. Audio/visual and networking changes
- 6. **Office Administration**
 - a. Collaboration efforts
 - i. Contact central offices for information and advice in all applicable areas
 - ii. Route paperwork
 - iii. Financial system changes (Procurement, Asset Mgmt, etc)
 - b. Communication plan
 - c. Employee Information
 - d. Notifications
- 7. **Development**