**PROCESS FOR**

**ORGANIZATIONAL CHANGES**

**OF**

**BUSINESS INFRASTRUCTURE**

**ACROSS BUSINESS FUNCTIONS**

**INCLUDING**

**FINANCE INFRASTRUCTURE**

**HUMAN RESOURCE INFRASTRUCTURE**

**DIRECTORY CHANGES & OTHER IT CHANGES**

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# **Purpose**

The process for Organizational Changes of Business Infrastructure (OCBI) is attempting to coordinate efforts across multiple service environments, which have each their own unique systems reflecting or incorporating NIU’s organizational structure as reflected in an org chart. These changes are per requested submission from Business Units and the appropriate level (i.e. a VP or AVP and their representative initiates changes for a Division, while changes to a Department might be done by a Director instead).

A cross-functional committee is organizing OCBI schedules, solicits, collect, deliberate and execute changes simultaneously four times a year, with date typically determined at the beginning of each Fiscal Year. Thus, an org chart change, addition, or deletion of a unit should be achieved by submitting a change to the OCBI Committee to guarantee appropriate execution of such.

The Committee is composed of representatives from following areas with their respective areas:

1. Division of Finance 🡪 Financial Tree (Grouping/Hierarchy of Cost Center)
2. Human Resource Management 🡪 Department Tree (Grouping/Hierarchy of Departments)
3. Division of Information Technology 🡪 Directory (Folder Structure for Servers) & Address Book
4. Foundation Accounting Office 🡪 Foundation Accounting Tree
5. Sponsored Projects 🡪 Changes to Grant Allocation & Indirects Reimbursement Structure

As example moving a department through Human Resources would update that staff is allocated to report under unit B instead of unit A, but without this coordination the personnel might still be funded from the cost centers that are placed under unit A. Similarly, if cost center or a unit with multiple cost center are moved without coordination, Foundation and Sponsored Projects might not move along any funds they might have for that unit in their financial subsystems.

Each individual change may or may not include all these stake holders, however, each unit typically has only visibility into their own unit’s information, thus even coordination to determine this is not a cross-functional effort is needed. Once impacted units are identified, changes are coordinated to keep different areas and systems in sync to each other (occasionally there are minor differences).

Potential effects of changing the organization without coordinating changes to the business infrastructure could be reporting rendered inaccessible for staff and local leadership, financial transactions misclassified, large efforts of correcting entries through the ledger needed, legal challenges with union representation, wrong information published in the NIU phone book, violating Grant agreements or transactions failing through budget challenges.

There are two Outlook groups created to facilitate OCBI, which are Department Change Facilitators and Department Change Notification. The Facilitators are the power users of the represented Service Departments making the changes, thus all submissions should be sent their for everyone’s review, while the Notification is used to solicit submissions or communicate with the Business Managers.

If organizational changes should only require two units to coordinate with each other, the two units should refrain from overburdening the OCBI infrastructure and rather arrange for the changes in between them.

# Step-by-Step Process

1. Scheduling of Quarterly Organizational Change Meetings for Business Infrastructure
	1. Note: Informally reporting structures could change sooner than each quarter
	2. Change Dates proposed by Human Resources and Agreed Upon by Committee
		1. Committee Meetings are subsequently scheduled by Human Resources
2. Solicitation of Submissions of Organizational Changes
	1. This typically happens 6 weeks prior to a change date on which all units execute changes
	2. Solicitations are issued by E-Mail with needed forms and examples of how to file them
		1. Submissions outside of solicitation discouraged to avoid omission or errors
	3. Forms & Information to include the following:
		1. Cost Center Information Form (Finance)
		2. Department Change Form (HR)
		3. Listing of Current Tree (Available through Service Units)
		4. Listing of Proposed Tree (Based on Current Tree if desired)
		5. Listing of Cost Center, Position, Employees, Managers (HR & CC), etc.
3. Summary compiled for Change Requests
	1. About 1 to 2 weeks of time needed depending on volume and complexity of changes
	2. Typically follow up between Business Unit and Service Unit needed to clarify
	3. Done 2 weeks after solicitation or 4 weeks before executing change
4. Committee Meeting for Organizational Changes to Business Infrastructure
	1. Coordination and dispersion of needed changes
		1. Naming designations
		2. Keys in different systems (analogous)
		3. Scheduling System Outage Dates (Directories Mostly)
	2. Must be 2 weeks prior to execution for disclosure on DoIT Scheduling Calendar
5. Execution of Business Infrastructure Changes needed for Organizational Chart Change(s)