

Administrative Alignment Project Campus Open Forum

September 25, 2025

Hybrid: LSC Never No Summer Ballroom & Teams Online



Agenda

- 01** Welcome
- 02** Where We've Been - Phase 1
- 03** Phase 1 Outcomes
- 04** Campus Engagement + Q & A



Who joined
today?



How We Will Work Together On This Journey

Assume positive intent – We're all here to make CSU stronger.

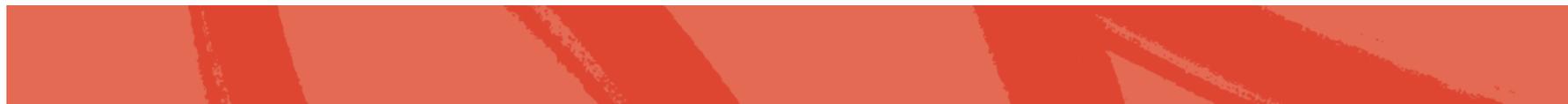
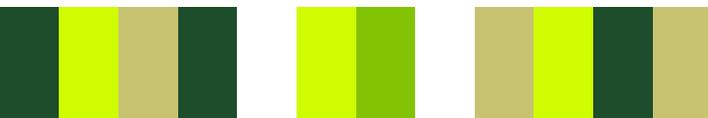
Engage with respect – Focus on ideas, keep feedback constructive, and work toward solutions. How we share matters – speak up in ways that help.

Stay curious and open – Ask questions, listen actively, and consider new ways of doing things.

Balance local and enterprise needs and strengths – Recognize value in both perspectives and aim for shared success.

Be transparent and accountable – Share information openly and follow through on commitments.

Support connection and community – Acknowledge contributions, celebrate progress, and look out for one another.



Announced in January, the Office of the Vice President for University Operations and Office of the Vice President for Human Resources will work with campus leaders, finance and human resource professionals, and campus stakeholders to align the financial and human resources support for the university.

Through this alignment, CSU aims to enhance organizational effectiveness, implement best practices and support all CSU employees.

Why?

- **Protect and advance the academic enterprise:** Deliver high-quality operational and service support that enables teaching, research, and student success.
- **Modernize and streamline operations** by introducing leading financial and HR strategies that improve efficiency and service delivery
- **Ensure long-term sustainability and alignment** by responsibly managing resources and workforce planning in support of institutional priorities
- **Foster inclusive operational excellence** through collaborative decision-making and proactive change management that engages stakeholders and prepares for future transitions.

Why We Are Doing This:

- **Lack of Standardization:** Processes are inconsistent across and within units, with no centralized ownership or training for standard systems.
- **Decentralized Autonomy:** Units prioritize independence over consistent, transparent financial and HR practices.
- **Inconsistent Standards:** Financial reporting, training, and reconciliations lack uniform university-wide guidelines.
- **Scalability Issues:** Central systems and processes do not effectively scale or integrate with campus needs.
- **Limited Career Growth:** Small teams offer few advancement opportunities.
- **Knowledge Silos:** Heavy reliance on individual experience and institutional memory, with insufficient onboarding, knowledge sharing, and accountability.

What We Will Achieve:

- **Protect and advance the academic enterprise:** Deliver high-quality operational and service support that enables teaching, research, and student success.
- **Foster Career Growth and Mobility:** Create clear pathways for skill development and advancement across the organization.
- **Enhance Efficiency:** Improve responsiveness and consistency to better support university and campus needs
- **Streamline Operations for Impact:** Align people and processes to focus on mission-critical work, balance workloads, reduce high-volume, transactional tasks, and standardize roles for accountability.
- **Shift from Reactive to Strategic:** Build proactive systems that anticipate needs, address challenges early, and support long-term success.

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Where We've Been: Phase 1



Phase 1 Goals:

What is the vision for the future state of HR and Finance excellence at CSU?



**Administrative
Alignment
Vision**

What is the current state of HR and FIN functions across the organization?

What questions exist?



**Current
Alignment
Assessment**

What functions must exist in the future state of HR and Finance at CSU and how might they be organized?



**Functional
Blueprints**

Workstream Governance and Stakeholder Engagement Plan

Group	Engagement Approach	Participant(s)
Steering Committee (SteerCo)	<ul style="list-style-type: none">• Will provide the project with strategic direction and provide final decisions	<ul style="list-style-type: none">• Brendan Hanlon, VPUO & CFO• Eric Ray, VPHR• Carolyn Lawrence-Dill, Faculty• Julie Weber, HR Consultant
Advisory Group	<ul style="list-style-type: none">• Will review progress, findings, and provide feedback/recommendations	<ul style="list-style-type: none">• Advisory Group (see next slide)
Design Team	<ul style="list-style-type: none">• Will lead blueprint design, share subject matter expertise, and provide recommendations	<ul style="list-style-type: none">• Advisory Group• SteerCo• Accenture Team• Functional Leaders
Interview Participants	<ul style="list-style-type: none">• Will provide background and current state understanding	<ul style="list-style-type: none">• Extensive Interview List



Advisory Committee

Advisory Group's Role

Offer insights on:

- Financial sustainability
- Workforce planning
- Operational efficiencies
- Future-state finance and HR operations

Recommend innovative, collaborative solutions to financial and HR challenges.

Engage in strategic discussions that support the university's financial and HR objectives.

Identify risks, challenges, and opportunities, and develop practical solutions aligned with institutional goals.

Represent campus constituencies and provide broad institutional perspectives.

**Not a decision-making body*

Advisory Group Members (*alphabetical*):

- Dave Carpenter, Executive Director of Operations, CHHS
- Katherine Castaneda, HR Business Partner
- Christy Conrad, Dir. of HR, CVMBS
- Allison Dineen, Executive Director of Finance and Administration Operations, COB
- Kristen Felten, Sr. HR Manager, CNS
- Jennifer Fisher, Division Budget Manager, Student Affairs
- Carolyn Lawrence-Dill, Dean, College of Agricultural Sciences
- Mark Ritschard, Assist. Dean of Operations, WSCO
- Stephanie Laurent Tracy, HR Manager, Libraries
- Naomi Ward, Professor & Department Head in CVMBS

Meet The Accenture Team



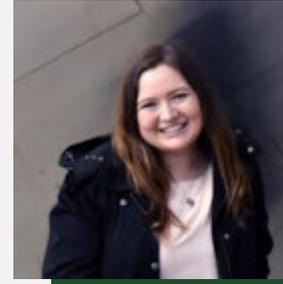
Jessica Roy

Executive Sponsor



Ardis McElhaney

Delivery Lead



Caroline Gray

*Operating Model and
Org Design Manager*



Jacob Mullin

Delivery Lead



Tiffany Clark

*HR Functional
Consultant*



Charlotte Bell

*Organizational Change
Management Consultant*



Milo Magno

*Financial Functional
Consultant*



Summary of Engagement

The voices and materials that shaped our understanding of HR, Finance, and CSU as a whole.



700+ Participants Engaged*

Multiple groups were engaged to ensure diverse set of insights

Group Engagement: Advisory Group, CAAG, HR Community, HR Connection, Provost Leadership Council, Employee Leadership Council, Cabinet, Open Forum



77 Interviews Conducted

The interviews involved 92 participants that spanned 27 different units and totaled 58 hours of interviews

Interview Breakdown: 33 aligned to campus, 13 aligned to enterprise, and 31 Leadership roles (Deans, VP, Provost, OGC)



Documents Analyzed

Reviewed 50+ documents, spanning specific units to high level overview, which identified 8 employee types the functions serve

Types of Documents Analyzed: Org Charts, classification and compensation reports, executive communications and presentations, survey results, CSU websites, financial reports, budget documentation, College Strategic Plans, unofficial feedback documents



*Note: The participant total reflects the number of attendees per meeting and may include duplicate individuals across sessions; it does not represent a unique individual count.



Unit Engagement Breakdown in Phase 1

We engaged a diverse group of stakeholders across campus through interviews, blueprinting sessions, and the socialization of our work.

Interviews by Unit

Unit
Athletics
College of Agriculture
College of Business
College of Engineering
College of Health & Human Services
College of Liberal Arts
College of Natural Resources
College of Natural Sciences
College of Vet Medicine
CSU System
Division of Finance
Division of HR
Engagement & Extension
Enrollment & Access
Facilities Management
Forest Service
Foundation
Inclusive Excellence
Information & Tech
International Program
Libraries
Marketing & Comms
Operations
President
Provost Office
Research
Student Affairs
University Advancement

Meetings Held

Group	Date
Advisory Alignment Group	7/16
HR Community	7/17
HR Connection	7/17
Advisory Alignment Group	7/29
CAAG	8/2
Alignment Finance Blueprinting Sessions	8/12-8/13
Alignment HR Blueprinting Sessions	8/12-8/13
CAAG	8/13
PLC	8/13
Open Forum	8/14
1-1 Finance Blueprinting Follow-Ups (4x)	8/19 -8/22
Alignment Advisory Group	8/26
BFS (As part of Interviews)	9/4
HR Connection	9/4
Cabinet Meeting	9/5
Alignment Advisory Group	9/9
HR Connection	9/11
Division of HR All-Staff	9/12
HR Community	9/18
Finance Community	9/21



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Phase 1 Outcomes



Phase 1 Outcomes

Administrative Alignment Vision

Outcome: Guiding principles for this process and "North Stars" - an overarching shared vision - for each of HR and Finance informed by best practices, the Advisory Group and additional subject matter experts

Current Alignment Assessment

Outcome: A preliminary analysis of data and stakeholder input to understand current state of administrative alignment including strengths and opportunities for improvement.

Functional Blueprints*

Outcome: Completion of a future state blueprints, capturing all necessary campus HR & Finance functions, and how they might work in the future.

**Not an org chart*

Outcome 1: North Stars and Guiding Principles

Seek to Understand: We will consult with units, departments, and all other stakeholders to comprehensively understand resources, needs, and operational impact in each area.

Cultivate Talent: We will cultivate the strengths and excellence of our employees by providing professional growth and development opportunities.

Connection: We will ensure, regardless of reporting structure, that staff remain connected and an essential part of their respective units.

Advance the CSU land-grant mission: We will ensure alignment with the CSU land-grant mission and strategic direction

Finance North Star

We are a **collaborative, trusted partner** delivering transparent, strategic, and **service-driven financial stewardship** that empowers our people and the university community, advances the public good, and aligns resources to achieve **meaningful outcomes** in transformative education, exemplary, high-impact research, and innovation.

HR North Star

We envision an HR function that empowers the University by fostering a vibrant community where all employees thrive. Through **aligned, efficient, and consistent services and processes and strategic partnerships**, we support every state of the employee journey and advance the objectives of the University, its colleges and divisions. Our work **advances institutional excellence** in teaching, research, service, and extension by delivering structure, functions, initiatives, and services that **attract, develop, engage and retain top talent.**

Outcome 2: Five areas of focus emerged throughout our interviews

Define Roles & Responsibilities

Role definition and assigned responsibilities are inconsistent leading to duplicated efforts, talent mgmt. challenges, and lack of accountability.

Clarify Org. Structures

HR and Finance org. structures vary across campus without anchoring to common strategy or workloads, posing barriers to scale.

Transparency in Data & Systems

Systems, including shadow systems, do not “speak” to each other enterprise-wide, inhibiting data informed decision-making.

Standardize & Simplify Processes

Lack of predictable, documented process leads to inhibited performance tracking and varied customer service experience.

Leverage Change Management

There are persistent views of skepticism, resistance, and lack of trust in CSU Administration making change an uphill battle.



Outcome 2: Putting Leading Practices in Place

Based on what we heard regarding where CSU is today, there are five focus areas that will enable CSU to engage and adopt the necessary changes that will be worked on throughout and after the alignment.

Governance

Align the Organizational Structure

Clarify roles to reduce confusion and improve trust.

Define Metrics for Success

Set and share clear goals to track progress of the Alignment.

Set Clear Expectations of Accountability

Lead with accountability and eliminate non-compliance.

People

Define Ways of Working

Set clear service expectations and promote mutual respect.

Prioritize Continuous Internal Talent Development

Build structured career paths and consistent training.

Standardize Roles and Responsibilities

Align job titles and responsibilities to support equity.

Process

Build a Consistent Employee Experience

Standardize onboarding, hiring, and training across all units.

Standardized Policies and Procedures

Align core processes and scale proven practices to reduce inconsistency.

Create a Central Knowledge Repository

Maintain a shared, centrally owned repository for policies and procedures.

Culture

Articulate the Value Proposition

Communicate the “why” clearly and often; engage stakeholders early.

Institute Robust Change Management

Share timely, transparent updates and empower change champions.

Build Resilience for a Changing Environment

Promote agility to support academic and administrative success.

Establish Guidance for Maintaining Customization

Balance local expertise with scalable, compliant practices.

Technology

Support a Rationalized, Updated Tech Landscape

Streamline systems, train users, and explore Gen AI for efficiency.

Empower Data-Informed Decision-Making

Improve data access and reporting to support secure, informed decisions.

Modernize Procurement and Standardize Service

Align procurement, simplify rules, and set clear turnaround expectations.

Disclaimer: The level of effort to institute these Leading Practices will vary; CSU Leadership will need to evaluate and prioritize each for degree of impact and ease of implementation.



Functional Blueprints



It is critical to understand the scope of Blueprinting.

Definition

Blueprinting is a criteria-based, data informed approach to envision where and how the work can be performed in the future

Blueprinting **is**...

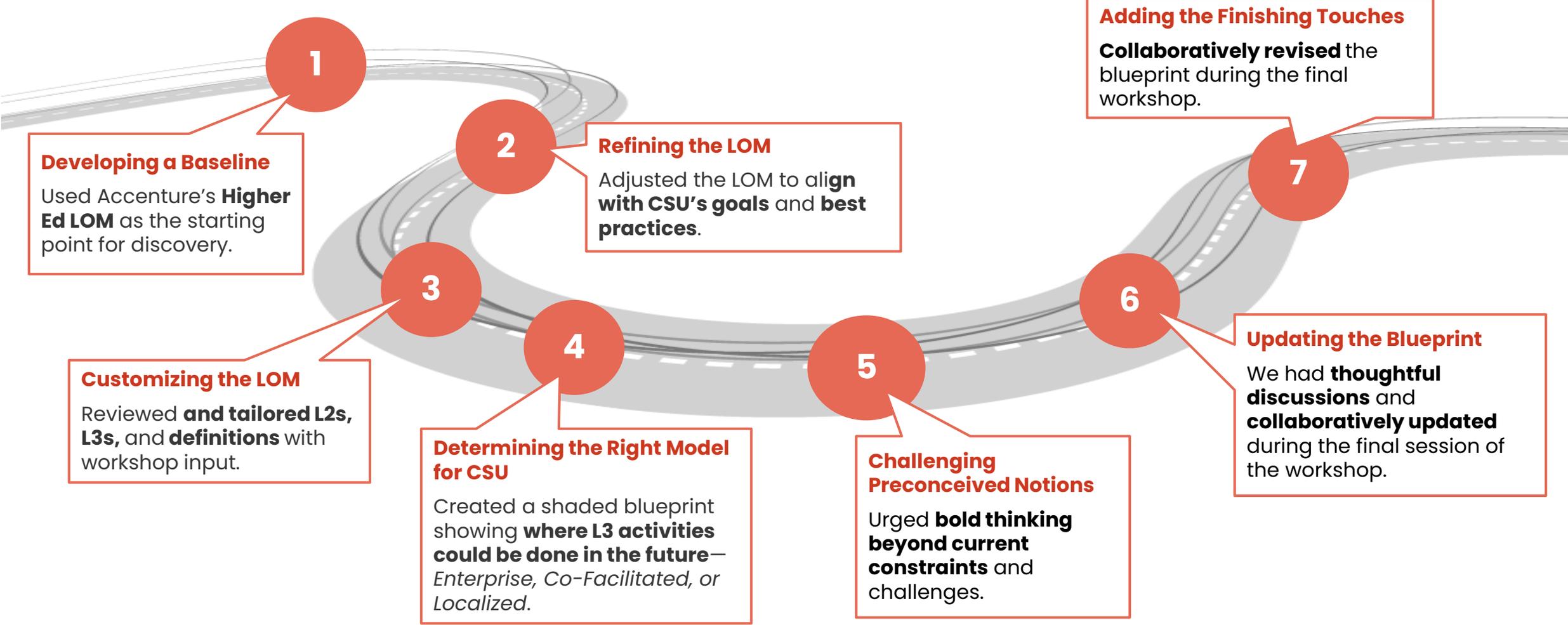
- Conducted function by function; decisions made by one function do not necessarily impact decisions in another function
- Determining the type of work that is being performed in the function
- Architecting how and where work will be delivered throughout the organization
- Estimating the value of moving to new organizational models

Blueprinting **is NOT**...

- An organizational chart
- Determining people reporting lines; decisions only impact where the work is performed and from where/how in the organization it is delivered
- A detailed time study that specifies time allocated per process for each person



Our approach to future-state Blueprinting was grounded in leading practices and supported by expert voices who represented diverse viewpoints from across CSU.



The right model will enable a more agile institution.

Alignment will mean that all of CSU will be speaking the same language and walking in the same direction.

Enterprise



- Owned within an enterprise team
- Sets strategy and direction for teams who may execute
- Accountable for outcomes for capability

Co-Facilitated



- Shared between enterprise and localized teams
- Work activities are collaborative
- Accountability can vary between enterprise and localized teams for outcomes for a capability

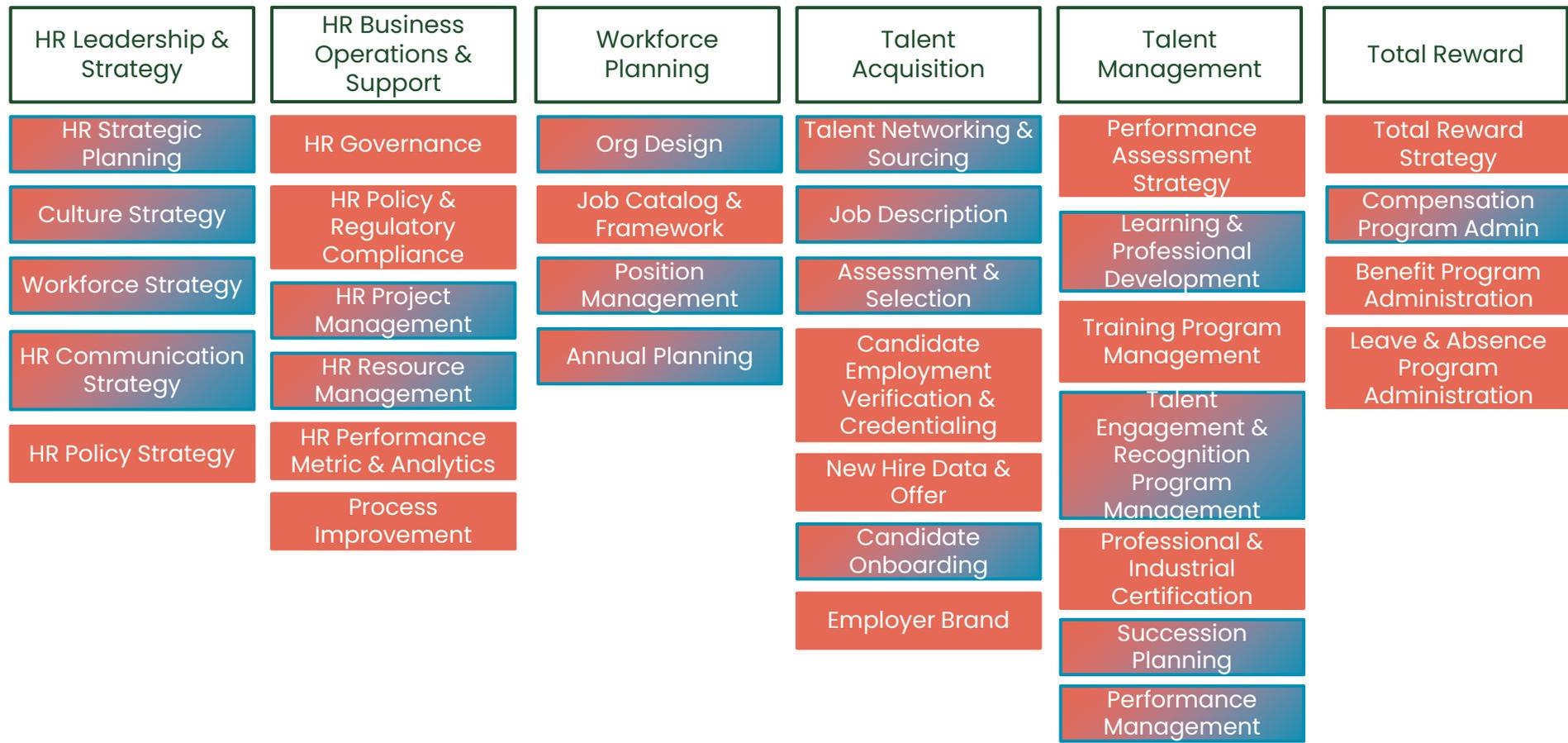
Localized



- Owned locally, often due to knowledge living within college / division
- Accountable for outcomes for capability
- Enterprise sets strategy, supplies templates and guidance



The Blueprint outlines the future where the work should be done within the HR function (1/2).



- Co-Facilitated
- Enterprise
- Localized

The Blueprint outlines the future where the work should be done within the HR function (2/2).

Employee & Labor Relations	Workforce Administration	HRIS & Data Management	Time & Labor	Payroll
Employee Relations	Data Management	Data Architecting	Scheduling	Payroll Administration
Discipline Management	Position Data Updates	HR Reporting & Analytics	Time Tracking	Employee Data Administration
Grievance Management	Employee Data Updates	HR System Business Architecture	Time Off & Leave	Payroll Tax Administration
Labor Relations	Workforce Separation Processing – Voluntary & Involuntary	HR Application Support		Payroll Processing
Contract Administration		Data Security		Payroll Accounting
	Offboarding			Payroll Reporting & Application Support
	Relocation			
	Sponsorship			
	Transfer & Retention Management			

- Co-Facilitated
- Enterprise
- Localized

The Blueprint outlines the future where the work should be done within the Finance function (1/2).

Financial Strategy & Governance	Budgeting, Planning & Forecasting	General Ledger	Accounts Receivable & Collections	Procurement*	Capital Projects	Tax Accounting & Auditing	Accounts Payable
Financial Strategy	Scenario Planning	General Ledger Management	Customer Data Management	Strategic Sourcing	Capital Planning	Tax Administration	Supplier Master Data Mgmt.
Financial Policy & Compliance	Target Setting	Fund Management	Customer Contract Mgmt.	Catalog Management	Capital Project Management	Tax Accounting	Invoice Receipt & Processing
Financial Governance	Budget Development	Journal Entry Processing	Customer Billing	Category Management	Project Reporting	Tax Processing	Payment Processing
Financial Process Improvement	Budget Adjustments	Month & Year End Close	Deposits & Payment Application	Supplier/Vendor Management	Financial Strategy Oversight & Approval	Tax Auditing – Internal	Refund Management
Fin. Perf. Metrics & Analytics	Budget Oversight & Approval	General Ledger Reconciliation	Collection Processing	Requisition to PO		Tax Auditing – External Authority	AP Reconciliation & Period Close
	Budget Reconciliation	Financial Accounting	Customer Inquiry & Dispute Mgmt.	Goods / Service Delivery & Receipt		Tax Reporting	AP Reporting
	Forecasting Multi-Year	Financial Statements	Accounts Receivable Reconciliation	Change Order & Returns			
	Budget Reporting	GL Reporting	Revenue Accounting	Financial Oversight & Approval			
	Compensation Planning	Financial Oversight & Approval	Accounts Receivable Reporting	P-Card Expenses Expense Management			
			Accounts Receivable Reporting				
			Financial Oversight & Approval				
Co-Facilitated							
Enterprise							
Localized							

*Changes may occur to L2 due to ongoing changes within this functional area

The Blueprint outlines the future where the work should be done within the Finance function (1/2).

Travel & Expenses	Treasury & Cash Management	Gift Management*	Asset Management	Grant Management**	Student Organization Financial Mgmt.
Travel Expenses	Banking Relationship Management	Donor Setup	Asset Master Data Management	Scientific Grant Pursuit	Fund Management
Cash Advances	Banking Payment Processing	In Kind Gift Approval & Processing	Asset Acquisition	Operational Grant Pursuit	Financial Approval of New Projects
Petty Cash / Non-Travel Reimbursements	Bank Reconciliations	Gift Accounting	Asset Transfers	Grant Compl. Mgmt.	Financial Accounting
Travel Card Expenses Expense Management	Cash Position Management	Endowment Accounting	Asset Disposal	Award Setup	Financial Oversight & Approval
Expense Reporting	Debt Management	Gift Revenue	Asset & Equipment Tracking	Award Modification	
Financial Oversight & Approval	Investment Management	Gift Expense Transactions	Asset Adjustments	Award Closeout	
		Gift Agreement Approval	Asset Depreciation	Grant Reporting	
		Financial Oversight & Approval	Lease Management	Subawards	
		Gift Receipting	Asset Period Close	Sponsor Billing / Receivables	
			Asset Reporting	Pre-Award	
				Grant Accounting	
				Indirect Cost Waivers	
				Financial Oversight & Approval	

- Co-Facilitated
- Enterprise
- Localized

*Changes may occur to L3s due to ongoing changes within this functional area

** Grants Management will be finalized after consulting with OVPR

Looking Forward



Now & Next



Current State Assessment & Blueprint

- ✓ Define the North Stars
- ✓ Develop Current State Assessment
- ✓ Create the Case for Change
- ✓ Co-develop the future state Blueprint

1



Detailed Design

- Design high-level processes and detail for how services are delivered
- Design organizational structure
- Define change management approach

2

3

- Workforce Management
- Preparation of enabling technology, governance, and transition plan
- Develop strategy for resource allocation
- Assess design, ensure alignment

Integration



4

- Shift reporting lines
- Design and Staff Roles
- Establish service deliver models
- Provide transition support and training
- Institute change management
- Build and implement new ways of working

Implementation



What to Expect Moving Forward



Detailed Design & Integration

Key Activities

- Understand current reporting lines and people through a detailed data analysis
- Ask staff to share what they do for work through a survey
- Facilitate design sessions to map functional activities to the Future State Blueprints
- Design an organizational structure that supports the alignment, which includes roles, responsibilities, enabling technology, and decision-making framework
- Plan how services will be delivered in the future state
- Create a plan to help people adjust to the future changes
- Identify key people and groups to involve in the process
- Build a clear communication and engagement plan
- Develop a transition strategy and roadmap to move from current state to the future state of the Alignment



Implementation

Key Activities

- *Activities will be determined based on the Transition Strategy and Roadmap*



Visit the Website for Regular Updates

[University Administrative Alignment of Human Resources and Finance](#)

COLORADO STATE UNIVERSITY | UNIVERSITY OPERATIONS

About ▾ Areas of Oversight ▾ Resources ▾ Completed Construction ▾ Incremental Budget Series Budget Model Redesign

Administrative Alignment of HR & Finance Open Positions

University Administrative Alignment of Human Resources and Finance

Colorado State University (CSU) is assessing the Finance and Human Resources to strengthen service delivery, improve efficiency, and better support toward greater consistency and collaboration across all colleges and involved teams and individuals as we move toward a future state of...

PROCESS & TIMELINE

Jan – Sept 2025

Phase 1: Foundation

This phase focused on listening and learning. We built awareness across campus, collected organizational data, and held conversations large and small to begin co-developing high-level "blueprints"—draft playbooks for how HR and Finance work could flow in the future, starting with documenting the range of HR and Finance-related functions and work across campus.



Fall 2025

Phase 2: Design

In the next phase, we'll learn in Phase 1 and the details of how service practice. This includes complete current state conducting work analysis design workshops, divi organizational data, co stakeholder engagement communications, mapping

Phase 1 Outcomes

Current Alignment Assessment

Outcome: A preliminary analysis of data and stakeholder input to understand current state of administrative alignment including strengths and opportunities for improvement.

Why it matters:

- Provides a view into where we need to strengthen and better support critical capabilities for greater consistency across campus.
- Uncovers insights into decision-making processes and governance to reveal opportunities for efficiency and improved effectiveness.
- Engages stakeholders to share experiences and supports a foundation for Blueprinting.

Administrative Alignment Vision

Outcome: Defined guiding principles for this process and "North Stars" – an overarching shared vision – for each of HR and Finance informed by best practices and stakeholder input.

Why it matters:

- Establishes a baseline for Blueprinting and other activities to ensure consistency throughout the Alignment project.
- Encourages greater awareness, visibility, and accountability.

Guiding Principles

These guiding principles provide a framework for which we will strategically evaluate and operationalize administrative alignment:

1. Seek to Understand:
 - We will consult with units, departments, and all other stakeholders to comprehensively understand resources, needs, and operational impact in each area.
2. Cultivate Talent:
 - We will cultivate the strengths and excellence of our employees by providing professional growth and development opportunities.
3. Connection:
 - We will ensure, regardless of reporting structure, that staff remain connected and an essential part of their respective units.
4. Advance the CSU land-grant mission:
 - We will ensure alignment with the CSU land-grant mission and strategic direction

Please continue to share your thoughts via the online Feedback Form

Model Blueprints Campus Engagement + Feedback and Question Form

We have been holding discussions with key stakeholder groups across campus to solicit questions and feedback regarding the administrative alignment of Human Resources and Finance. These groups include, but are not limited to, employees involved to HR and Finance work functions and employee councils. As we continue engagement activities, we always encourage anyone in our CSU community to provide their comments or questions through the online form below. Your insights are critical in shaping a model that collectively best serves our institution while ensuring the needs of each college, division, and unit are met.

If you have questions, comments, or other feedback regarding the Administrative Alignment, please fill out the feedback form below. You may choose to include your name or submit the form anonymously (anonymous submissions will not receive replies).

Administrative Alignment Feedback Form

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

Context (optional)

1. Name

Enter your answer

[Fill out the Administrative Alignment Feedback Form in Microsoft Forms](#)

Frequently Asked Questions

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Campus Engagement



At the Open Forum on August 14th, we asked about what is going well in HR and Finance functions and what pain points folks are experiencing....

What to Maintain / Preserve:

- Timely, practical support
- Knowledge, expertise and institutional documentation
- Reliability and efficiency
- Collaboration and communication
- Support and accurate information
- Acknowledgement of certain unique needs (e.g. research/grant management)

What to Aspire to:

- Timely and nimble responsiveness
- Proactive and consistent communication
- Improved onboarding and ongoing training – support for all!
- Reduced unnecessary work and rework
- Data access and transparency
- Workflow clarity and process efficiency
- Collaborative, trust-based culture of
- Growth mindset and continuous improvement

Employees want both **strong, personalized, responsive, and knowledgeable local support, and strong central offices** to deliver consistent, efficient, communicative, and supportive services. They want a system where **local expertise thrives** and **central units enhance** rather than hinder department-level operations.

Additional Engagement

**Online feedback form
(Microsoft form available
since August, remains open)**

30 individuals (as of 9/24)
Multitude of questions and
responses to the survey
prompts

**Online questions gathered for
today's forum only
(Menti, closed)**

20 individuals
46 questions



Feedback Form:

Highlights from Desired Outcomes of Alignment

Collaboration &
Partnership

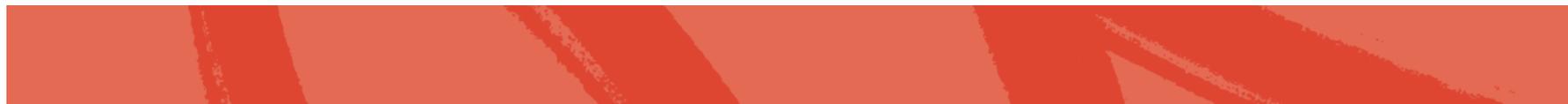
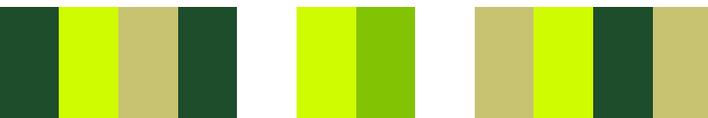
Efficiency,
Standardization &
Training

Balance between
Compliance &
Practicality

Flexibility &
Recognition of
Unique Needs

Transparency,
Accountability &
Communication

Practical
Outcomes



Feedback Form:

Key Themes for Building Confidence in Future Changes

Communicate Clearly
& Transparently

Engage Staff Early &
Meaningfully

Ensure Consistency &
Accountability

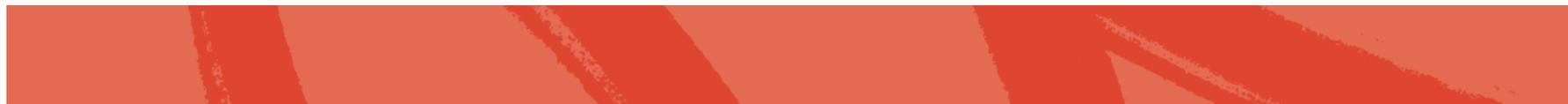
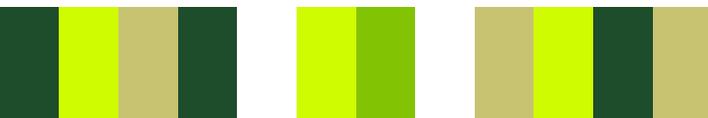
Provide Job Security &
Role Clarity when
Known

Respect and
Incorporate Local
Knowledge & Unit
Differences

Support Units
Operationally

Rebuild Trust Through
Actions

Focus on Positive
Outcomes &
Acknowledge
Impacts



Q & A

