

Skyline State University Case Study: Travel Policy Procedures and Practices Task Force

The Setting

Skyline State University (SSU) is a comprehensive public institution founded in 1922. With an enrollment of 26,000 students and its 4,300 faculty and staff, SSU plays a very significant educational role in its city and region. Skyline meets a broad array of educational needs through its undergraduate, graduate, and continuing professional education schools. Like many other institutions, the university faces significant budget challenges in the period ahead, and the situation is unlikely to improve in the foreseeable future.

Organizationally, SSU has two major divisions: 1) the Office of the Senior Vice President for Academic Affairs to which all academic deans and directors report as well as the leaders of other academic, student, and academic support functions, and 2) the Office of the Senior Vice President for Administration and Finance to which budgeting, procurement, facilities, human resources, public safety, auxiliary services, and all other administrative areas report.

The Project

SSU's president has decided to form an Administrative Efficiencies Advisory Group (AEAG), to be headed by the senior vice president for administration and finance. Its mandate is to conduct a university-wide review of administrative operations and to identify areas where potential savings—time, human resource, and dollar—can be realized. The senior vice president of administration and finance has identified travel as an area with many potential opportunities for efficiency and cost savings. He has appointed you, the new director of purchasing, who has just arrived at the institution from a corporate setting, to head the Travel Policy Task Force, charged with “reviewing current travel policies and practices and procedures, and recommending change to enhance efficiency and effectiveness.”

In informal conversations with colleagues, you learn that travel policies and practices have always been handled in a decentralized manner, which is consistent with the university's culture. Faculty and staff make their own travel arrangements, pay for travel themselves, and then submit requests for reimbursement. Based on your experience, you know that SSU could cut expenses by standardizing and centralizing travel policies and procedures.

Assignment

Consider both the perspectives of the people who will serve on the task force and the campus community who will be asked to make significant changes to the manner in which they undertake a basic function. Some possible members/stakeholders have already been identified. They are:

- Assistant director, budgeting
- Administrative assistant, facilities
- Assistant director, athletics
- Distinguished professor, biology
- Dean, School of Business
- Associate vice president for academic affairs
- Assistant director, information technology

Issues to Consider

- **Planning:** What are the critical elements in planning for a project like this one? Why?
- **Preparation:** What kind of preparation is helpful for task force members?
- **Stages:** What are the critical and predictable stages a task force will go through?
- **Leadership:** What leadership style or approach is most appropriate for this kind of project? What leadership competencies are particularly helpful in this kind of scenario?
- **Sponsorship:** What role does ownership, sponsorship, and/or endorsement by senior administrators play in the success of a project such as this?
- **Culture:** What are differences between the academic and administrative culture? How might these differences come into play in a project like this one?
- **Vision:** What elements of a vision are likely to be helpful as the project begins?
- **Delegation and Roles:** How might roles and responsibilities be structured?
- **Timeline:** Should a timeline of milestones or deliverables be established? When and how?

Other Information

- **Problem Definition:** One's first impression may be that the primary problem in this case relates to developing a new set of procedures and policies. In fact, overcoming cultural traditions such as decentralization is the more critical challenge. Unless the traditions of centralization and faculty autonomy are considered, it is unlikely that any solution, no matter how efficient and effective, will be embraced.
- **Stakeholder Analysis:** This case features many key stakeholders. Each of these groups will be affected by potential changes; each will have a stake in the new approach. Identifying the needs and concerns of each group and addressing them as a part of the process will help to assure the eventual acceptance of the plan.
- **Enthusiasm, Personal Conviction, and Persistence:** Maintaining and displaying enthusiasm, personal conviction, and persistence will be helpful as a team leader, particularly since the new policies and procedures will likely move in directions new to team members and the university community. Persistence and patience will be critical because the pace of change in higher education is predictably slower with more consultation than in comparable problem-solving situations in corporate settings.
- **Tolerance for Uncertainty and Risk Taking:** Because new policies and procedures are likely to differ from tradition, it will be important to convey and encourage a high comfort level with the exploration of new paths and approaches.
- **Credibility and Influence:** Establishing credibility will be a key success factor. Being named the task force leader by the senior vice president is likely to be helpful; perceptions of the Administrative Efficiencies Advisory Group initiative are, as yet unclear. To address the concerns of those who question the relevance of corporate experience, the key will be to establish credibility and influence through insights and good work rather than through asserting credentials.
- **Management and Facilitation:** Competencies in this area are important in the planning, preparation, coordination, and guidance of the work of the task force and its interaction with various campus constituencies. Effective planning and implementation of pilot projects are critical to the success of the overall project, in this case, the Administrative Efficiencies Advisory Group initiative. They help to identify attributes and problems with the identification and implementation of useful new policies and procedures, and to build grass roots support for the larger effort.