

# Aligning Financial Transformation with Organizational Process and Systems

Tarleton State University +  
Huron Consulting Group

SACUBO 2023 Fall Workshop



# Introductions



**Lori Beaty**

Executive Vice  
President/Chief Financial  
Officer

Tarleton State University



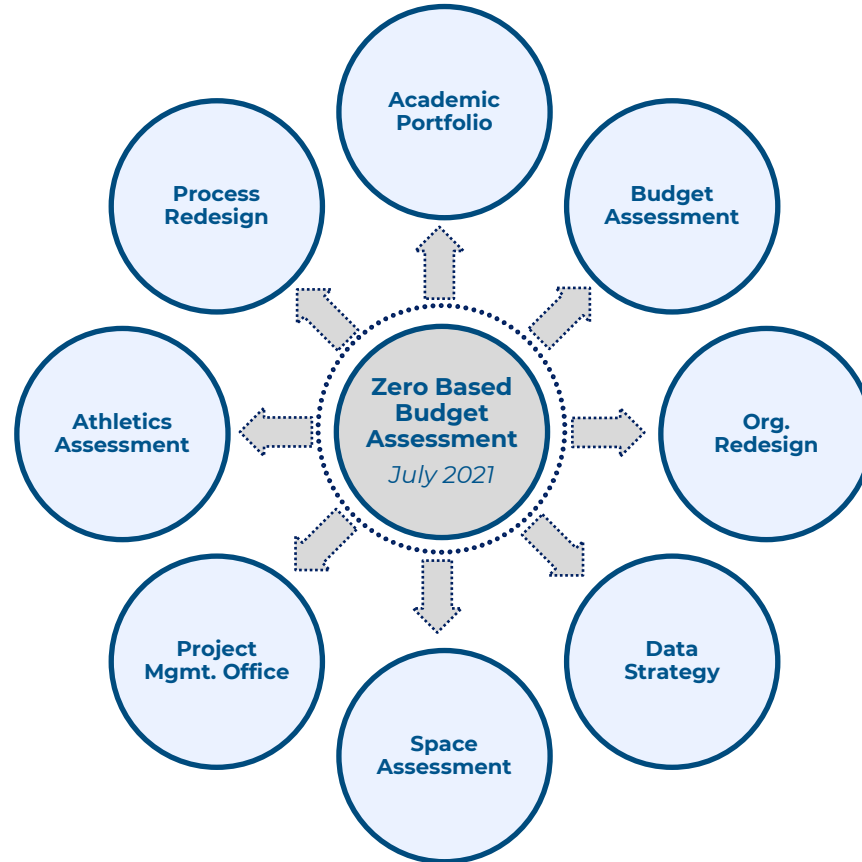
**Jennifer Ramey**

Higher Education  
Consulting Principal

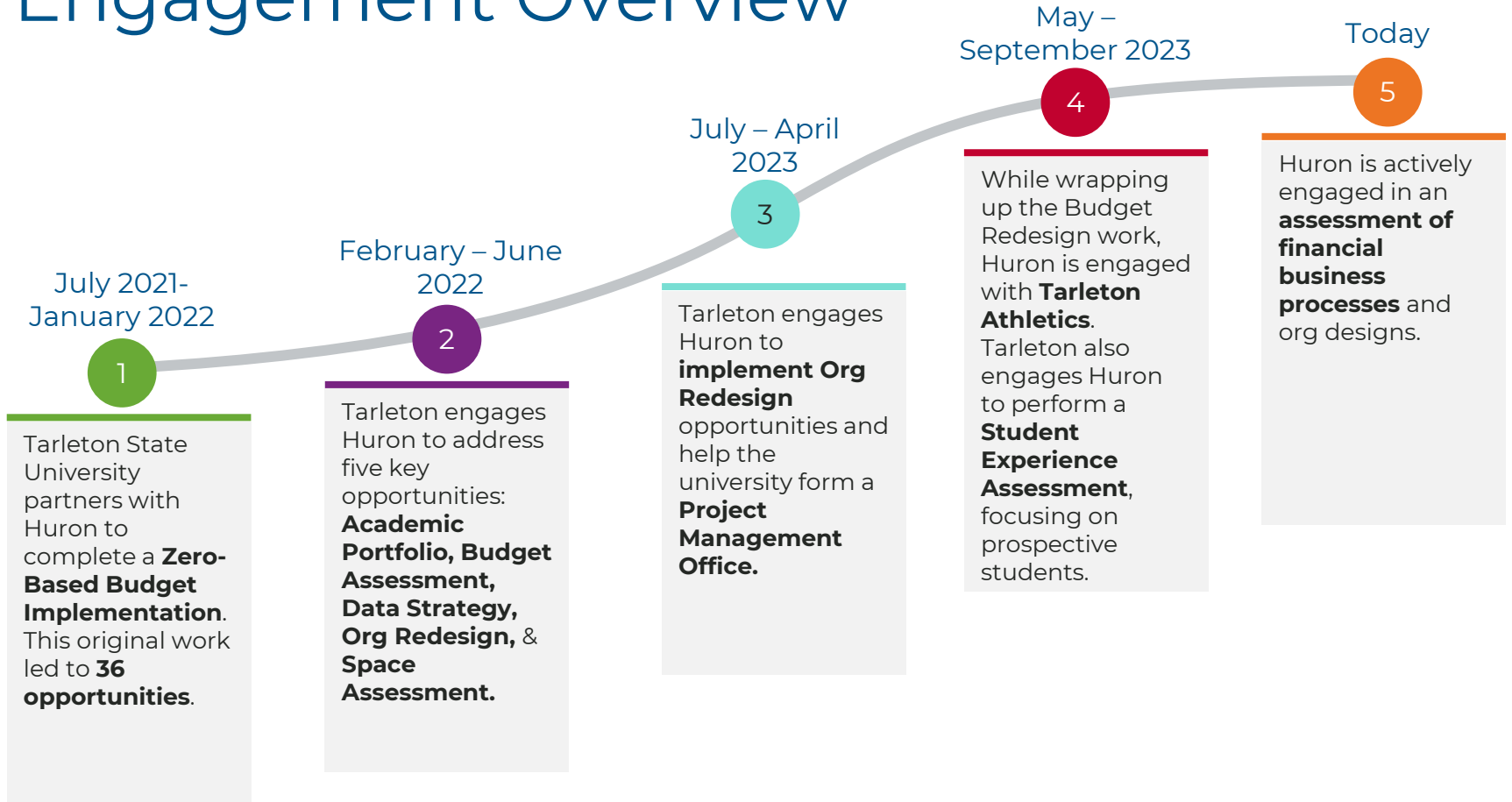
Huron Consulting Group



# Engagement Overview



# Engagement Overview



July 2021-  
January 2022

1

Tarleton State University partners with Huron to complete a **Zero-Based Budget Implementation**. This original work led to **36 opportunities**.

February – June  
2022

2

Tarleton engages Huron to address five key opportunities: **Academic Portfolio, Budget Assessment, Data Strategy, Org Redesign, & Space Assessment**.

July – April  
2023

3

Tarleton engages Huron to **implement Org Redesign** opportunities and help the university form a **Project Management Office**.

May –  
September 2023

4

While wrapping up the Budget Redesign work, Huron is engaged with **Tarleton Athletics**. Tarleton also engages Huron to perform a **Student Experience Assessment**, focusing on prospective students.

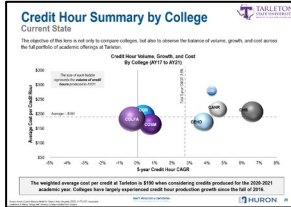
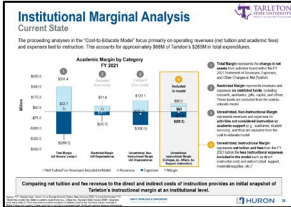
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5

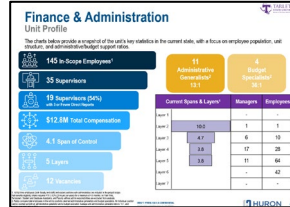
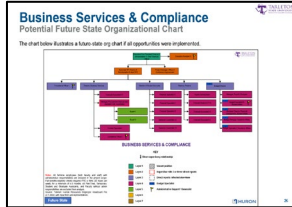
Huron is actively engaged in an **assessment of financial business processes** and org designs.

# Key Projects

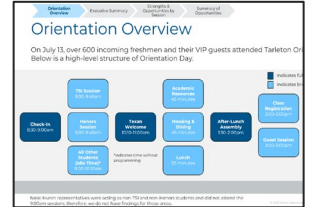
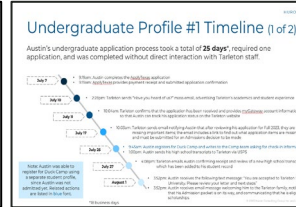
## Academic Portfolio Assessment



## Organizational Optimization



## Student Experience Assessment



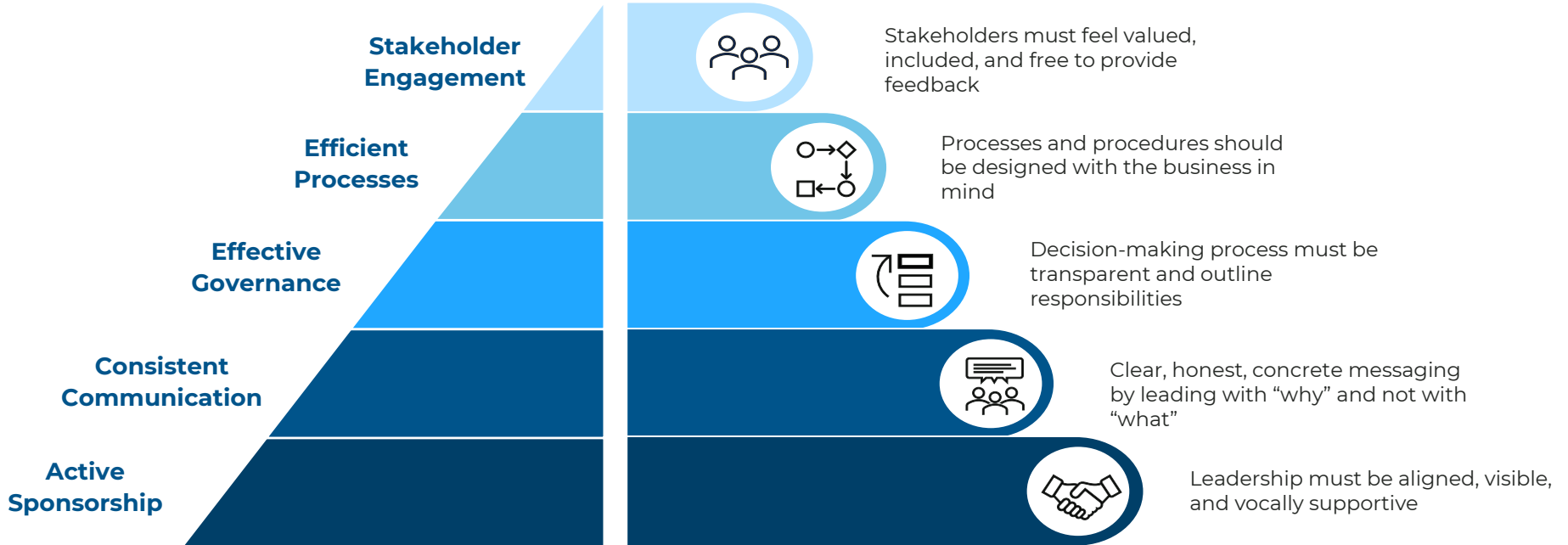
- Allow leadership to **better understand the economics** of the Tarleton's **academic programs**
- Develop a **dashboard** that identifies the **factors that influence the cost-to-educate** that, if adjusted, may **improve their efficiency** and free up operational funds for strategic initiatives

- Design a **sustainable organizational structure** that supports Tarleton's strategic vision
- Increase the **efficacy of each divisional organization** through the creation of a more **streamlined management** structure





- Shadow the **application and Orientation** processes to **understand first-hand** how **students first experience** Tarleton
- Identify **areas of opportunity** within the **prospective student journey** to Tarleton

# Managing Effective Change

Effective change and implementation management is an active process that requires effective leadership and buy-in from a wide range of stakeholders.



# Managing Change at Tarleton

Change Management	Communications
<ul style="list-style-type: none"><li>• Strong sponsorship from leadership (<i>President + President's Cabinet</i>)</li><li>• Implementation in phases</li><li>• Clear identification of “why”</li><li>• Individual outreach to change resisters</li><li>• Transparent &amp; frequent communication</li></ul>	<ul style="list-style-type: none"><li> Surveys</li><li> Email</li><li> In-person meeting series</li><li> Live campus-wide townhalls</li></ul>

# Key Learnings

1

Though Tarleton was in a position of strength, working with Huron allowed them to understand the levers they can pull when they do find themselves in a challenging position

2

These engagements provided data to support (or contradict) Tarleton leadership's anecdotes or "gut feelings"

3

Tarleton now has the data to understand how to scale operations as their student population and research continues to grow



# Questions?

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**Jennifer Ramey**

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# Check Out Code

**1:10pm - 2:00pm - 223A**

**2:10pm - 3:00pm - 224A**