

2016 Best Practices Proposal Form



CACUBO
Central Association of College
& University Business Officers

Completed proposals are to be submitted to bestpractices@cacubo.org or by contacting Donna Rohlfer, Director, CACUBO Best Practices Awards, rohlfedm@miamioh.edu.
The deadline is April 30, 2016.

Best Practices Program Submission:

Title: **Accounts Payable and Travel Transformation**

Primary* Contact Information:

The primary contact must be a CACUBO member institution of higher education.

Institution: Methodist College

Address1: 415 St. Mark Ct

Address2:

City: Peoria State/Prov: IL Zip Code: 61603

Salutation: Prof. Dr. xx Mr. Mrs. Ms.

First Name: Tim Middle Name/Initial: N

Last Name: Dietz Suffix (Jr, III, etc.)

Professional Title: Finance Director

Email : tdietz@methodistcol.edu

Phone: 309-672-4946 Fax:

*Additional team contacts may be listed at the bottom of this form.

Institution Information:

Institution: Research Comprehensive/Doctorate xx Small Institutions Community College

Year Founded: 2000

Geographical Location: Midwest

Number of Students: 625

Website: www.methodistcol.edu

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Statement of the Problem:

Provide a brief statement identifying the challenge your institution encountered that benefited from your best practice.

When I came into the role, I encountered a very paper-heavy, ink to paper approval process for pre-approvals and final approvals. In addition, the President did not feel comfortable that she was seeing all of the pre-approvals and final approvals that met her criteria of \$5,000. In addition, individuals in charge of budget could not understand where they were on their spend levels until a few months after.

Identify the Solution (250-words maximum):

Describe how you identified and developed your best practice solution including those involved with the process, impact on the organization, finances and resources.

After looking into a couple options (our educational software did not have good options – CAMS), we settled on trying to build an automated approval process through the Kissflow Google app. This app allowed for all of the tracking and multi-level approvals to be done without leaving paper on a desk. In addition, we have been able to attach budget amounts that decrease with each purchase request submitted.

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Implementation Timeline:

Provide a bulleted list of the steps and implementation timeline of your best practice solution.

1. 9/8/2014 identified a very paper intensive process.
2. 1/1/2015 spoke with internal finance and IT sources to ask for assistance in automating the process.
3. 2/1/2015 Google app was introduced and groundwork laid for a pilot.
4. 7/1/2015 App completed built out for use by the whole college for Accounts Payable and Travel
- 5.
- 6.
- 7.
- 8.

Benefits & Retrospect:

Provide a brief statement of the benefits achieved by implementing the best practice solution.

Benefits include:

- Much less paper
- Accountability for approval (paper isn't stuck on someone's desk. In fact, I haven't had a request to hunt down the paper for a year☺).
- All approvals are tracked and those in leadership are comfortable with the approval process
- Training was provided and much less follow was needed to track down outdated forms.
- Many happy comments from faculty and staff to have a more automated system.

Additional Team Contact Information:

Additional Contact #2:

Institution: Methodist College

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Address1:

Address2:

City: State/Prov: Zip Code:

Institution: Research Comprehensive/Doctorate Small Institutions Community College

Salutation: Prof. Dr. Mr. Mrs. Ms.

First Name: Nancy Middle Name/Initial:

Last Name: Rebholz Suffix (Jr, III, etc.)

Professional Title: Finance Assistant

Email : nrebholz@methodistcol.edu

Phone: 309-671-5112 Fax:

Additional Contact #3:

Institution: Methodist College

Address1:

Address2:

City: State/Prov: Zip Code:

Institution: Research Comprehensive/Doctorate Small Institutions Community College

Salutation: Prof. Dr. Mr. Mrs. Ms.

First Name: Middle Name/Initial:

Last Name: Suffix (Jr, III, etc.)

Professional Title: IT Director

Email : mhertzog@methodistcol.edu

Phone: 309-672-5533 Fax:

Additional Contact #4:

Institution:

Address1:

Address2:

City: State/Prov: Zip Code:

Institution: Research Comprehensive/Doctorate Small Institutions Community College

Salutation: Prof. Dr. Mr. Mrs. Ms.

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First Name: Middle Name/Initial:

Last Name: Suffix (Jr, III, etc.)

Professional Title:

Email :

Phone: Fax:

updated Feb 2016