2016 Best Practices Proposal Form

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, Ill, 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
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.
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
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.  

2016 Best Practices Proposal Form
2016 Best Practices Proposal Form

First Name: 
Middle Name/Initial:

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

Professional Title:

Email :

Phone: 
Fax:

updated Feb 2016