Specific Responsibilities and Deliverables

Responsibilities of the Leader

- Serves as champion and sponsor
- Assists project management team in finalizing work group membership
- Schedules group meetings
- Prepares a proposed agenda for each meeting
- Sends the proposed agenda to all members approximately one week prior to the meeting
- Personally attends each meeting (generally projected as 2-4 total meetings or conference calls)
- Facilitates group discussions regarding existing processes, and coordinates the documentation of those processes by group members
- Commissions best practices research and other information gathering efforts by group members
- Represents the work group to the Project Management Team, as well as the Steering Committee, Academic Council, Administrative Council, Budget Officers and Business Officers if necessary
- Openly communicates with Andersen representative on the work group, as well as others on the Project Management Team, regarding progress and direction of the group's efforts, as well as critical issues under consideration

Responsibilities of the Members

- Attends meetings of the work group, or arranges for representation by a peer with equivalent knowledge of the functional area
- Prepares for each meeting by previewing the proposed agenda and by actively gathering information regarding the subject matter to be discussed
- Seeks and shares with other group members the perspectives of users and process participants not represented within the work group
- Contributes to group efforts to discuss and document the current processes within the functional area, including the roles and responsibilities of each major participant
- Participates, as necessary, in research relevant to the functional area and to critical issues under consideration

Responsibilities of the Project Management Team

- Identifies functional areas to be addressed and confirms selections with Steering Committee
- Identifies and recruits work group leaders for each functional area
- With assistance from the work group leaders, identifies and recruits work group members
- Assists work group leaders in scheduling meetings
- Assists the work group leaders in the preparation and distribution of meeting agenda
- Provides representation at each work group meeting, and participates in group discussions as appropriate
- Prepares and distributes transcripts of meetings
- Assists in the work groups' efforts to critically analyze current policies, examine alternatives, research best practices, and draft policies
- Provides professional expertise in the application of GAAP, federal requirements and the IRS
- Participates in the drafting, review and presentation of new or revised policies, as well as other key deliverables
- Openly communications with leaders and members regarding the overall progress of the project and of the individual work groups

Key Deliverables

- Detailed summary of various roles and responsibilities within the functional area
- Map(s) of the high-level fiscal processes performed within the functional area
- Revised process map(s), as necessary
- Drafts of new or revised policies, as appropriate

This diagram was taken from the presentation made to the Business Process Work Group leaders at their September 13, 2001, meeting.

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