A Faculty Perspective on The Business Officer

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Full Disclosure

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Reality Check

• All Faculty are Not the Same
• All Business Officers are Not the Same

• BUT Perceptions of Each are based on Experiences -- Good & Bad
Reality Check

• Stereotypes Abound
• Getting Past Perceptions and Stereotypes is our Goal
• BUT...
We’ll Have Fun With Them Anyway!!
Budget Officers’ View of Faculty

2 Types
Faculty View of Business Officer
Service vs. Servitude
“Let us not forget, please, who are the Servers and who are the Servees.”

-- a former UCD Senate Chair (not LBC) to the Registrar
Service vs. Servitude

• Service is using one’s skills, talents and experience to assist in getting the job done.
• Servitude is blindly following orders.
Service vs. Servitude

- Both faculty and staff provide service.
- Service is honorable.
- Servitude does not serve the university well.
- Service is critical to the functioning of the university.
Why Some Faculty are “Difficult”

- Not Aware
- Bad Experiences
- I’m the expert!
- Remembers the “good old days”
- Remembers “good old Tom”- the GREAT Business Officer
Why Some Faculty are “Difficult”

• Not Aware
• Bad Experiences
• I’m the expert!
• Remembers the “good old days”
• Remembers “good old Tom”- the GREAT Business Officer
• Some faculty are just a Pain
Good Old Days*

- Department Staffs were “stable”
- Business Officers moved up within the department and were well known to faculty
- “Family”
- Rules were few and made sense
Now*

- Lots of Movement and Turnover
- Furloughs and layoffs
- No time to develop relationships
- No time to develop trust
- Lots more rules
  - Or so it seems
- More Rules evolving from outside forces
- More CY(UC’s)A
Faculty View of “Rules”
“Dumb” Rules

• Rules with no apparent rationale
• Rules that appear arbitrary
• Rules that seem designed to CYA
• Rules that appear to violate reason
• Rules written in “non-English”
• Rules that run counter to campus culture
Dumb Rules + Smart People =
Avoiding the Explosion

- Try and keep the faculty from seeing the rules
- Translate the rules into local idiom
- “Explain” (if possible) the rationale for the rules
- Let the Faculty know you will work with them.
Physics PIs,

Researchers and staff have been very busy lately with proposal submissions, several of which have required a very quick turn-around time. I write to ask, therefore, that in order to provide Georgie, Tracey & Elizabeth with enough time to do a thorough job, and to help maintain their sanity(!), PIs provide Physics staff with at least one week to prepare your proposals for submission to the Office of Research.
Remember also that the Office of Research requires proposals be submitted to their office at least five days prior to the funding agency deadline in order to provide a full review. **Failure to provide five working days necessitates an emergency review by that office and the PI must assume full responsibility for all errors subsequently identified by the sponsor or the campus.**

Thank you for your consideration!

Regards,
Tracy

Tracy Lade
Manager, Physics Department
Perceived Helpfulness Scale & Control-Service Scale
Control vs. Service

Control  Service
Maintaining Control while Serving the Faculty

• Create effective control via the perception of caring
• Create your local “rules” to support campus rules
  – local rules follow local culture
  – local rules support faculty over “them”
  – Local rules are flexible (within reason & “law”)
  – Local rules are well communicated
  – Local rules are fairly imposed
An Example......
Carole, I would like to move some funds from 02 to 05. OK??
Let me Check The PPM
Oh for that you need to fill out a DD-15, a APR-723b and ... Then we need to get them signed by these 10 people...
That seems like an awful lot of STUPID work to me. Can YOU get it done by Tomorrow??
OR
Carole, I would like to move some funds from 02 to 05. OK??
You Can't Do That... It's Against the Rules
OR
Carole,
I would like to move some funds from 02 to 05. OK??
Larry, I do not understand why you want to move money this way,
But, I will work with you to accomplish what you want to do.
Collaboration is the Key

• What does the faculty member, **REALLY** want to accomplish?
• Can it be done? How?
• Remember, **You are the expert.**
  Service not Servitude.
  Collaboration not Roadblocks.
The Goal is to create an relationship where working collaboratively & creatively is the norm.
Perceived Helpfulness Scale
Perceived Helpfulness Scale

Helpful  An Obstruction

Librarians,
Good Business Officers
Good Department Staff
Perceived Helpfulness Scale

Helpful

An Obstruction

Physical Plant
IT
Parking Control
“Them”
Bad Business Officers
Why YOU are NOT Helpful
As Seen by faculty

• Control Freak
• “All I get are rules, rules, rules!”
• Not Communicating
• “I don’t know you!”
• “Good Old Tom never made me do that!”
How to move Toward Helpful

- **Talk** to me
- **Listen** to me
- **Show me you care** - that you are on my side
- Don’t just tell me that it cannot be done
  
  *Help me do what I need done*

- Remember I know physics, not audit rules
The Department Chair

- Your “Boss” ??
- In General Not a Trained Supervisor
  - Of either you or the faculty
- In general lead faculty by “big brother” not supervisor.
- Short Term (except Med School)
  - 5-6 years then back to faculty
- Come with their own experiences as faculty
HELP ME !!!

When you need “back up”,
who to call on for HELP!!
Faculty are from Mars
Budget Officers are From Pluto
Communications
Utility
The University of California

BUSINESS OFFICER INSTITUTE

VS

the Library
Metaphors Clashed
The Key is Communication
The Problem with Communication is the Assumption it has Occurred
Do Not Underestimate the Importance Of Interpersonal Relationships
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