Introduction

Organizational change is a complex process that involves numerous systems and moving pieces across many areas including HR, Finance, and Information Technology. This document will assist units in understanding how to go about moving a U1 from one Major Administrative Unit (MAU) to another and the responsibilities of the unit(s) requesting the move.

Applicability

These guidelines apply to all units across the University as they relate to the moving of a U1. However, these guidelines in no way are intended to supersede the Academic Governance process. Additionally, if a move is part of a larger, more complex organization restructuring, please contact staff in the Office of Planning and Budgets (OPB) responsible for the Organization of Interest (OOI) application to discuss the process in greater detail than is provided in this document.

Moving a U1

Moving a U1 requires appropriate approval(s) from the appropriate Dean/Unit Head(s), the Director of (OPB), and in some instances, the proper Executive Vice President, Academic Governance, and the President. The different approvals required varies depending on whether the unit requesting the change is a degree granting college/unit/Neighborhood Student Success Collaborative (NSSC, formerly the Undergraduate University Division) or a non-degree granting unit. See the Illustrative Approval Process for Changes to Organizations at the U1 Level or Above at the end of this document for more information.

Once approvals have been received, the requesting organizations meet with the Organization Planning Group. This meeting serves as a time to talk through the process of moving the U1 with staff from the OPB, HR, Finance, and IT. At this time, responsibilities are defined and a timeline for the move is discussed.

Required Approval(s)

- Non-Degree Granting Units: The Dean/Unit Head from the MAU(s) requesting to move a U1 must first approve the request at which point, staff should e-mail the appropriate OPB staff who will seek approval from the Director of OPB to move the request forward to the appropriate Executive Vice President for approval. Upon receiving approval, OPB staff will contact the requesting unit to schedule a meeting with appropriate staff to begin the process of moving the unit.

- Degree Granting Colleges/Units and the Neighborhood Student Success Collaborative (NSSC, formerly the Undergraduate University Division-UUD): The requesting MAU(s) must first contact the appropriate executive, and follow the Academic Governance process, which may include required approval by the President, or the Board of Trustees for direction on moving an academic unit. Please see Appendix A: Illustrative Approval Process for Changes to Organizations at the U1 Level or Above for more information.
Once approval has been obtained through the proper process, the Dean/Unit Head(s) of the requesting organization(s) should contact OPB, and include proof of approval (an e-mail from the proper executive or an attachment in an e-mail is acceptable form of approval) to start the process of moving the unit. The Director of OPB will be notified that the request, with appropriate approvals, has been received and at this time, a meeting with the Organization Planning Group and appropriate staff from the requesting MAU(s) will be scheduled, which begins the process of moving the unit.

To contact OPB staff responsible for OOI, please send an e-mail to orgchng@msu.edu

**Jointly Administered U1s**

If a U1 that is jointly administered seeks to move, approval must be obtained from all MAUs involved in the move. Furthermore, if the U1 that is under the Lead MAU moves to another MAU, the MAUs must decide who will become the new Lead.

**Meeting with the Organization Planning Group**

Once a request to move a U1 has been received by OPB with accompanying required approval, staff in the organizations responsible for moving the unit meet with the Organization Planning Group. This is a multi-disciplinary workgroup that includes representatives from OPB, Finance, HR, and IT/Security that meets with units across campus, as requested, to help walk them through the organization change process. This meeting is held to discuss the reasoning behind the desired move, outline what tasks the unit must complete before organization is moved, how roles will be reassigned, and set at timeline for when the move will occur.

**Timetable and Timeframe for Moving U1s**

Once an approved request to move a U1 is received by OPB, unless it is an emergency request initiated by executive management, it may take up to 8 weeks to move in OOI. This is due to various factors, some of the most common being the availability of staff from the units/organizations requesting the move to meet with the planning group, any outstanding concerns the MAUs have between them are agreed upon, and a date to process the move that will not interfere with payroll processing.

However, since OOI is the system of record and interfaces with numerous other systems across campus (such as KFS and SAP) as the fiscal year ends and the new one begins, many of these systems are being utilized for year-end activities and reporting. From mid-May to mid-June as year-end processes begin, only urgent requests to move a U1 and those initiated by executive management are accommodated. However, from mid-June to September, OOI functions, such as moving U1s, may interfere with these systems and produce inaccurate reporting. Therefore, moves are typically not completed during this time unless the request is initiated by executive management.

Furthermore, the annual raise process takes place from early September through October. During this time, certain OOI actions, including moving U1s, may be unavailable, unless requested is initiated by executive management.
Appendix A: Illustrative Approval Process for Changes to Organizations at the U1 Level or Above

Below is general information on the approval process for various types of org changes. If you have specific questions about the approval process for your particular unit and change requested, please contact OPB for further assistance. Please note, the approval process for organization change in no way supersedes decisions made by the appropriate executive, Academic Governance, the President or the Board. All questions relating to the creation, moratorium, or ending of academic programs should continue to be directed to the proper resource.

Note: The * indicates that for University centers and institutes, approval must be granted by the Vice President for Research and Graduate Studies.

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<tr>
<th>Order of Required Approvals for Organizational Changes</th>
<th>1. Dean/Unit Head</th>
<th>2. OPB</th>
<th>3. Provost/EVP*</th>
<th>4. Academic Governance</th>
<th>5. President</th>
<th>6. Board of Trustees</th>
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**Academic Programs**

Creation/Moving/Merging/Splitting/Moratorium/Ending of a U1 or above (Degree Granting College/Unit & Neighborhood Student Success Collaborative) | ✔️ | ✔️ | ✔️ | ✔️ | ✔️ | ✔️ |