

Department Organization Change Process

As Cal Poly grows and changes with the student population needs, directional variations from management and modifications to processes and procedures, it may become necessary for departments to realign their reporting structure within the University. For such modifications to be completed in a fashion where all parties are made aware in a timely manner, an efficient method for processing department organizational changes is necessary. The Department Organization Change process is the mechanism which will handle that communication chain.

New academic departments need to be approved by the Provost's Office prior to beginning the process below. Documentation for this procedure can be found at: [Reorganization of Academic Programs and Academic Units](#)

In summary, the process entails the following general steps.

1. The [Department Organization Change Request Form](#) is completed by the requesting organization to include current department information, new department information and information on inactivating now unnecessary Department ID's.
2. The form should be approved by the Department Manager of both the Department making the organizational change as well as the Department Manager accepting the organizational change, if necessary.
3. The form is forwarded via Adobe Sign to [Valerie Maijala](#), Administration and Finance.
4. Administration and Finance will initiate the appropriate system changes and work with Human Resources and Academic Personnel to ensure the needed modifications to their systems are initiated as well.
5. Once appropriately approved, Administration and Finance will confirm all necessary system changes have been finalized and communicate the completion of the Department Change process to the requestors and other parties related to the change as appropriate.

This process should take approximately two weeks to complete, assuming all defined processes are correctly followed, and procedures are accurately completed.

Should there be questions regarding the process, time frame, form completion or any other aspect of transaction, please contact [Valerie Maijala](#) at x61187.

Making departmental changes such as this can have far reaching impacts. Other things to assess when considering departmental changes include:

- a. Changing open purchase orders for correct chartfield values
- b. Ensuring P-Card purchases will be charged correctly going forward
- c. Processing any security changes that may be necessary due to the department change
- d. Notifying departments that have recurring chargebacks of the new chartfield
- e. Notifying facilities if any open work orders exist
- f. Ensuring any additional documentation such as Position Funding Forms, AP101 or HR101 for personnel changes is provided
- g. Funding amount to transfer if an existing department is being moved