UW Bothell Shared Services Pilot Executive Summary

Project Description

Shared Services is a business model that allows organizations to leverage resources across the entire organization and provide services to multiple business units resulting in lower costs, higher productivity, increased compliance, and improved customer service.

The Shared Service Work Groups will review and recommend implementation and staffing/resource plans for the pilot services that were identified by the Launch Committee and approved by the two Executive Sponsors. Drivers include the budget recalibration and enrollment pause.

Current Project Scope

- **Pilot Areas**
  - Workday Tasks – I-9 Coordinator and Costing Allocation Coordinator
  - eTravel and eReimbursement – Entry and Compliance Approval
  - Other Services to Be Considered: Visa Processing and Glacier, Purchasing and Backup Services

- **Training**
  - Minimal to moderate – depending on service provided

- **Support**
  - Fiscal & Audit Services staff and a few SMEs or trained staff

- **Risks**
  - Workday uncertainty – this is a brand new system
  - Inadequate resources

Next Steps

- Develop communications plan (campus email, presentations to stakeholder groups, website) by Launch Committee, Early October 2017
- Establish Work Group members by Launch Committee, Early October 2017
- Schedule meetings with stakeholder groups across campus to gather feedback by Project Team, Mid-October 2017 (after Launch Committee meets)
- Work Groups meet to determine deliverables and timelines by Work Groups, Late October 2017

Objectives/Model Features

- Opt-in
- Centrally funded
- High skill, low costs
- Flexible/adaptive
• Reliable
• Focus of quality and continuous improvement
• Customer-focused
• Lower risk, increased compliance

**Timeline to date:**

- **Feb**  
  Kickoff Retreat Led by Ruth Johnston and Project Leaders
- **Mar-May**  
  Presentations to campus by CASSS and UC Davis Shared Service Leaders
- **Jun**  
  Workday Launch
- **Jun**  
  Workday Troubleshooting
- **Jul**  
  Confirm Launch Committee Members and Identify Pilot Areas
- **Aug**  
  Workday Troubleshooting
- **Sep**  
  Workday Troubleshooting
  
  Fiscal & Audit Services Workload and Shared Service Assessment
  Establish Work Groups and Communication Strategies

**Executive Sponsor:** Ruth Johnston, Vice Chancellor, Administration and Planning  
Susan Jeffords, Vice Chancellor, Academic Affairs

**Project Leaders:**  
Christine Howard, Administrator, STEM  
Jenny Albrecht, Manager, Fiscal & Audit Services  
Kendra Yoshimoto, Director, Fiscal & Audit Services

**Project Support:** Amanda Kim, Project Manager

**Launch Members:**  
Amy Stutesman, Administrator, UW Bothell and Cascadia College Library  
Bill Humphreys, Administrator, IAS  
Carmen Staab, Budget Fiscal Analyst, IAS  
Cindy Shirley, Director, Office of Research  
Dan Sullivan, Fiscal Specialist, Facilities Services  
Ellen Weinstein, HR Manager for Faculty, Organizational Excellence & Human Resources  
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