Shared Service Retreat  
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Point Person Model

Background
- Established to create equity/efficiency  
- A lot of people to serve, but there was too much back and forth and role confusion  
- A transition in management created an opportunity to identify needs  
- Localized rules were established; ownership by departments and service providers

Current Status
- Has been successful, without the usual starts and fits  
- In place at some administrative units, all schools  
- No cost associated for implementation  
- No service agreement with schools  
- Admissions: in compliance support, no point person identified yet  
- Promotes shared responsibility  
- Added benefit for point person, who receives better training

What is a Shared Service?
- Shared vs. Central service  
- Involves local level decision making  
- Shouldn't force involvement (opt-in model)  
- Helps with backup

Academic Admin Feedback

Perspectives
- Varied, but all hope for communication flow

Areas for Development
- Criteria, models, solving right problems  
- Workflow charts, good presentations  
- Repository  
- Reliable service  
- Clear roles & responsibilities  
- Good use of online tools  
- Local management level involvement  
- Ability to free up time for other important activities
Fears
- Being left out
- No evaluation or refining
- No communication flow
- Big workload
- All talk, with no work towards continuous improvement

Pain Points
- Lack of backup
- Lack of support at implementation level
- No time for analysis

Lessons Learned
- Local variation needed for balance
- Need supervision by someone knowledgeable
- Should not be top down, but develop collaboration
- Requires good communication, opportunities for feedback
- Expectations should match resources
- Clear roles & responsibilities
- Clear processes

Goals, Outcomes and Principles
- Standardization
- Allows for local variation
- Business architecture in place (services, processes, policies, whole plan, maps, aligns with strategy)
- Transparency
- Progress reports/metrics
- Evaluation/assessment
- Continuous improvement
- Opportunity for feedback
- Good staff (low turnover)
- Good training
- Happy customers
- Strong partnerships
- All still connected
- Good/improved use of technology

What is success?
- Balance of work at local and shared service level
- Staff savings (time)
- Focuses on higher level work
- Clear expectations and agreements
- Level of knowledge in Shared Services is high and accurate
- No rework
- Experts doing the work and advising campus
- Standardization/documentation
- Compliant
- Reduced risk
- Continuous improvement
- Reliability
- Happy customers!
- Good collaboration

5 Areas of Focus

- Faculty OPUS (6 votes)
- Onboarding (8 votes)
- Procard (6 votes)
- Web (9 votes)
- Travel reimbursement (6 votes)
- Other areas: Fiscal, Events, Honoraria/Purchasing, Training, Search Support, Records Retention, Campus Phone

1. **Onboarding (Sharene, James)**

Departmental Onboarding (logistics)
- Who: Department, OE HR, IT, Facilities, Security, PPSM, FSA
- What: New checklist (DocuSign) to include steps for I-9s, keys, ARIBA access, NetID, etc.
- Cost: Personnel Cost (set-up of DocuSign template)
- Timeline: 2+ month timeline
- Buy in: Meeting with Hiring Managers for buy-in

2. **Procard: Conference Registration (Jenny, Amy, Carmen)**

Centralized Registration
- What: Login/credentials: is this feasible?
- What: Group registrations; Web form/Request mechanism
- Who: FAS, Department Administrators/Budget Managers, IT, travelers
- Timeline: Unknown, but need to build web form, approval mechanism, procedures/scope
- Funding: Determine scope of work and existing resources to determine funding
- Communication: Advertise (web, school, dept.), nballs; Feedback/Info to impacted groups
- Buy in: Need buy in from Administrators, Departments, Schools, Staff
3. **Procard Review (Jenny, Amy, Carmen)**
   - What: Transactional review of all Procards
   - Including taxes, object/budget coding, Compliance/Allowable, Approvals, Documentation completion
   - Budget review: additional to transaction
   - Move central purchasing, possibly
   - Who: FAS, Procard holders, Administrators and Budget Approvers
   - To do: Process/Stakeholder assessment; Review of current Procard holders and use; Form/Standardization of documentation
   - Funding: Centrally or re-deploy existing staff?
   - Timeline: Unknown
   - Buy-in: Administrators
   - Communication: NBALL, feedback from affected group

4. **Travel Reimbursement (Soofin, Kendra)**
   - What: eTravel reimbursement (document prep, entry into ARIBA, compliance approval in ARIBA, funding approval in ARIBA)
   - Who: travelers, enterers, compliance approvers, fund approvers
   - To do: FAS becomes enterer and compliance approver; use unit point person model?
   - Training: travelers and fiscal staff
   - Funding: Roll out in phases to assess workload with existing resources
   - Timeline: can start now…but short staffed
   - Buy in and communication: meet with units, use opt-in model

5. **Web Content and Management Support (Sue, Cindy)**
   - What: New websites/pages/periodic updates for UWB public site (content must be provided)
   - Who: service providers and customers
   - To do/service: layout design/content/forms and other needs
   - Funding: free/customer funded
   - Timeline: one month
   - Who/communication: collaboration to create communication flow
   - Communication (secondary): dashboards, emails

6. **Web Forms (Sue, Cindy)**
   - What: design/develop online forms based on customer need in current platforms (Kentico, SharePoint online, DocuSign)
   - Who: service owners, UWB IT
   - To do: requirements gathering, estimates
   - Funding: free/customer funded
   - Timeline: three months
   - Communication: advertisement/communication and implementation/collaboration
   - Dashboards, emails

7. **Payroll: Faculty (OPUS) (Christine, Rita)**
What: data entry, new appointment/reappointment, affiliate, merit, distribution updates, grants, campus service, promotions
Who: Academic units, FAS, administrators, support staff, payroll coordinators, supervisors, OEHR
To do: Identify critical tasks (eliminate waste), assign tasks/responsibilities to local
Need standardization vs. variation, need tech tools to help with work, need understanding of Workday
Funding: central for efficiencies created at local level, additional funding as needed
Timeline: know task assignments (local/shared) by new fiscal year; training on Workday currently happening; develop over summer quarter; classified merit on July 1, faculty/pro staff merit by September 1
Buy in: risk reduction for school providers due to separation of duties; increased transparency, change management with Workday; build school support in training group; role of administrators is key
Communication: at HR/P meetings, on SharePoint, other workspaces (NOT email); regular updates and sharing of pilot
STEM: Kimba, Kendra, Jenny

Messages
- Town Hall: Ruth to report at high level

What Went Well?
- Respectful of ideas
- All engaged
- Productive and narrowed to 5 topics of focus
- Balanced perspectives/realistic
- Good scope, well managed, have a plan
- Location

Next Steps
- Need a formal charge with members and subgroups (all agreed to keep going) (Kendra, Jenny, Christine)
- Funds (Ruth)
- Review work and priorities
- Do the just do its
- Identify who else should be involved
- Need talking points for messaging (Christine, Kendra, Jenny)