Shared Services
Launch Committee Meeting

October 12, 2017
Shared Services Launch Committee Agenda

October 12, 2017
9:30 – 11:00 AM
Beardslee Crossing 102M/N

Topics

9:30 AM  Welcome & Updates (Christine, Jenny, Kendra)
9:40 AM   Review Shared Service Areas and Staffing
9:50 AM   Brainstorm & Report Out in Groups: Workgroup Structure for 3 Pilot Shared Service Areas
  • Cost Allocation (Jenny)
  • eTravel Reimbursement (Kendra)
  • I-9 (Jenny)
10:30 AM  Brainstorm Communication Strategies
10:50 AM  Messaging for Today
Shared Service Areas and Staffing (Review)
Group Structure

> Executive Sponsors: Ruth Johnston and Susan Jeffords

> Planning Group: Christine Howard, Jenny Albrecht, Kendra Yoshimoto
  • Plans and facilitates discussion for Committee and Working Group

> Launch Committee: Existing members + additional representatives
  • Provides broad recommendations and support
  • Communicates out info
  • Provides campus perspective

> Working Group: Some Committee members + FAS + end users
  • Smaller group comprised of SMEs (subject matter experts) tasked with accomplishing
    Shared Service area goals
  • Have one for each Shared Service area?
Shared Service Areas and Staffing

Cynthia Yee, Kimba Steffa and Maria Jimenez:
> Workday - I-9 Coordinator
> Workday - Costing Allocations Coordinator

Matt Guenther and Sharyn Singh:
> eTravel (point person model)
> eReimbursement (point person model)
Brainstorm & Report
Out: Workgroup Structure
Building a Shared Services Center

- **Assess**: Understand Current State
- **Design**: What works for your institution?
- **Build**: Making it reality
- **Deploy**: Operations start
- **Optimize**: Mai

**Scope**
- Models
- Budget
- Staffing
- Location
- Governance

**People**
- End to End Process
- Technology
- Service Partnership Agreements
- People
- Deployment Transition team

**Process**
- Roadmap
- Change management
- Communication
- Relationship Management
- Deployment continuous improvement

**Technology**
- Metrics
- Assess service delivery
- Engaging stakeholders
- Employee Engagement
- Continuous improvement

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**Change management, Continuous Improvement, & Communication**

WACUBO
Western Association of College and University Business Officers

www.wacubo.org
Workgroup Goals

- Develop Project Plan with Clear Deliverables and Timeline
- Process Mapping (including resource assessment, technology needs, forms)
- Workflow Definition (what end process is, who is involved)
- Service Partner Agreements
- Communication Plan
- Others?
Revisiting Workgroup Structure Brainstorm

Include:
- FAS staff
- Subject matter experts (SMEs)
- Business process experts
- Technical experts
- Representation from campus stakeholders/implementers

For Workday:
- Include Workday security role holders (e.g. OEHR, FAS, Administrators and Student Affairs)
- Include UW Seattle Integrated Service Center (ISC) resources/staff
- Examine each Workday task separately
Break-out Discussion – 20 min.

> Who should be involved in the workgroup? – Recommend individuals

> Who should chair the workgroup?
Report Out – 10 min.
Workgroup Timeline Estimates

> Workgroup recruitment/charge – October 2017

> Workgroups meet – November 2017

> Pilot finalization and launch – December 2017*

*Note: Subject to Workgroup recommendation
Brainstorm Communication Strategies
Communication Strategies

**Goal:** Keep campus apprised of progress

> Who are our key stakeholders?

> How shall we communicate our progress? Website, email, listserv, open forums...
Messaging for Today
Thank you!

> Website: https://www.uwb.edu/finance/shared-services