Shared Services Retreat
February 13, 2017
Agenda

1:00 PM   Welcome, Intros & Ground Rules   (Ruth)
1:15 PM   Current State of Shared Services   (Kendra/Jenny)
         − Campus wide
         − eReimbursesments and eTravel
1:45 PM   Academic Administrator Perspectives   (Christine)
         − Hopes, fears & pain points; discoveries from past work
2:15 PM   Goals, Outcomes & Principles for New Work
         − What is success?
2:45 PM   Break
3:00 PM   Brainstorming & Discussion
3:30 PM   Identify What to Pursue
         − By Whom, When, Funds Needed, etc.
4:00 PM   Practical Matters Discussion (Small Groups)
4:30 PM   Next Steps
4:45 PM   Evaluate Retreat
5:00 PM   Adjourn
Ground Rules

- Begin and end on time
- Work for the good of all of UW Bothell
- No sacred cows, be open to new ideas and ways of doing things
- Share the floor and allow for all voices
- Be honest and respectful
- Listen
- Support the work in/outside retreat
- Ask for clarity when needed
- Be positive; change is hard!
- Be results/solutions focused
- Free yourself from distraction (e.g. phone, email)
- If you miss all/some of retreat, be responsible to find out what you missed
- Agree to messages to communicate out at end of retreat
Administration & Planning Services

- **Administration and Planning**
  - Auxiliary Services
  - Campus Safety
  - Emergency Preparedness
  - Environmental Health and Safety (coming soon)
  - Facilities Services
  - Fiscal and Audit Services (details below)
  - Institutional Budget and Planning
  - Mail Services
  - Organizational Excellence/Human Resources (OE/HR)
  - Physical Planning and Space Management (PPSM)

- **Fiscal and Audit Services**
  - **Major Areas**
    - Contracts management (new)
    - Campus cashier
    - Payroll processing for staff and hourly employees
    - Procurement services including procurement card oversight
    - Travel bookings on central travel card; Christopherson Business Travel
    - Billing and accounts receivables related to Veterans Affairs billing,
      co-location costs and copiers
    - ASTRA systems access management for institutional financial, student and human resource data
    - Audit liaison interfacing with internal and external auditors
    - Fiscal compliance and ethics resource
    - Fiscal training resource for entire campus
  - **Campus Review and Approval**
    - ARIBA approvals:
      - eReimbursement compliance approval – many units
      - eTravel compliance approval – many units
      - Non-PO Invoice compliance approval – entire campus
      - Payments to Individuals – entire campus
    - Food approvals – entire campus
    - MyFD expense transfer approvals – entire campus
    - OWLS updates – additional units
    - Payroll transaction approvals such as overpayments and leave payouts – entire campus
    - SAGE grant proposal administrative approvals – entire campus
What is a Shared Service?

- A service that is used by multiple departments, but is managed and performed by one department.

- Example:
  - Multiple departments need to reimburse their faculty, staff and students.
  - Fiscal & Audit Services (FAS) performs reimbursement documentation entry and compliance approval as a service.
UW Bothell Shared Services

- **Services Provided** – Enter and compliance approve all eTravel and eReimbursements

- **Point Person Model** – Launched May 2016

- **Staffing** – Two FAS staff share the tasks of 1 FTE; partner with “point persons” in each School/program

- **Customers** – Staff, faculty and students seeking reimbursements

- **Quarterly meetings** – Share updates and feedback; continuous improvement; focus on customer
Point-Person Model

1. Traveller submits reimbursement
2. Point person organizes and verifies budget
3. Questions/info requests to point person
4. Information entry E-Travel/Reimb. (Maddi)
5. Compliance review (Sharyn)
6. Compliance adjustments
7. Budget approval
Partners

❖ First Year Pre-Major Program
  ▪ Cinnamon Hillyard (Director)
  ▪ Sara Ali (Program Manager; Point Person)

❖ Goodlad Institute
  ▪ Kellie Holden (Administrator; Point Person)

❖ Library/Information Technology/Technology Learning Center
  ▪ Amy Stutesman (Administrator)
  ▪ Nancy Esterly (Staffing Services Coordinator; Point Person)
  ▪ Monica Manzo (Program Coordinator; Point Person)
  ▪ Robyn Smidley (Program Coordinator; Point Person)

❖ School of Business
  ▪ Pam McGrath (Administrator)
  ▪ Marci Myers (Faculty and Administrative Affairs Specialist; Point Person)
  ▪ Drew McCutchen (Assistant to the Dean; Point Person)
  ▪ Khizran Noor (Fiscal Specialist I; Point Person)

❖ School of Education
  ▪ Toni Hartsfield (Program Manager)
  ▪ Ann Busche (Program Coordinator; Point Person)

❖ School of Nursing and Health Studies
  ▪ Rita Johnson (Administrator)
  ▪ Skyler Klagenberg (Administrative Assistant; Point Person)

❖ School of Science, Technology, Engineering and Mathematics
  ▪ Christine Howard (Administrator)
  ▪ Ellis Zhuang (Program Assistant; Point Person)
  ▪ Dee Ann Lommers-Johnson (Program Coordinator, Point Person)

❖ Student Success Center
  ▪ Dorothy Baumgartner (Director)
  ▪ Adry Gonzalez (Student Success Center Coordinator; Point Person)
Point Person Model Successes

- Timely processing
- Standardized procedures and streamlined processing
- FAS staff are subject matter experts
- Three FAS staff backup one another
- Strengthened relationship with the UW Seattle Travel Office
- Feedback and continuous improvements
Shared Services Concepts in Higher Education
Centralization
- Single department completes function
- Focus on efficiency and control
- No service level agreements, not focused on performance standards

&

Shared Services
- Customer-Driven
- Performance-drive culture
- Service Level (or Partnership) agreements
- Separate organization with governance/oversight

Decentralized
- Close to customer
- Not standardized processes
- Focus on responsiveness
Why Shared Services in Higher Education?

**Economic**
- Higher Productivity
- At maturity, lower cost
- Reduced expenses

**Speed**
- Reduced process or cycle time
  - Payroll
  - Procurement
  - Accounts Payable

**Quality**
- Better service for customers
- Higher compliance
- Decreased error rates
- Develop subject matter expertise

**Strategic Value**
- Shift expenses from administration to academic missions
- Support growth with less employees
- Process standardization
- Enable mission of higher education institutions
Likely Costs of Implementation

- **Quantitative**
  - Relocation
  - Training
  - Standardization
  - Reengineer processes
  - Technology investments
  - Design and outfit new facility

- **Qualitative**
  - Short-term fall in morale and performance
  - Short-term decrease in process efficiency
  - Learning curve for new systems
  - Initial disruption to working environment
Building a Shared Services Center

- **Scope**
- **People**
- **Process**
- **Technology**

- Models
- Budget
- Staffing
- Location
- Governance

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

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

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

Change management, Continuous Improvement, & Communication
College of Arts & Sciences – 2010 Humanities Shared Services

- Smaller Arts & Sciences departments faced stark challenges
  - Staff cuts
  - Increasing administrative workloads
  - Increasing risk exposure
  - No new resources

- Response
  - Humanities Shared Services Center (2 year pilot)
College of Arts & Sciences (A&S) – 2010
Humanities Shared Services

❖ TIMING – CONCEPT TO PILOT

- Concept Development: 7 months (2010)
- Launch Preparation: 9 months
- Pilot: 18 months (2011 - 2012)

❖ STAFFING

- Manager: Hired in 2011
- Fiscal Specialist II: 2 hired in 2011; 1 hired in 2012
- Web Services for A&S: hired in 2011

❖ WORKING GROUP

- Humanities Administrators
- FM and HR subject matter experts

❖ UW FINANCIAL MANAGEMENT

- Facilitated and scoped project deliverables
- Offered LEAN methodologies to map current processes and develop measurements and analytics
CASSS Staffing – 2016

- Manager
- Change Management Analyst/Payroll
- Fiscal Specialist Supervisor
- Fiscal Specialist II
- Fiscal Specialist I
CASSS Partners – 2016

- Currently supports 21 Arts, Humanities and Social Sciences units:
CASSS Service Areas – 2016

- Honoraria
- HR/Payroll
- News (Metrics, Announcements)
- Payments
- Purchasing
- Records Management
- Reimbursements
- Summer Quarter
- Travel
- Visa
Expanding Shared Services at UW Bothell
Academic Administrator Perspectives

- **Hopes and Fears**
  - Planning phase
  - Implementation phase

- **Current Pain Points**

- **Lessons Learned**
  - Best practices
  - Principles
Goals, Outcomes, Principles for New Work – What is success?
Brainstorming What’s Possible
Narrowing to a Phased Plan
Practical Matters

- Define the service
- Who is involved?
- What needs to be done?
- How will it be funded?
- What’s the timeline?
- How to create buy-in?
- What’s the communication plan?
Next Steps

- Who, What, When
- Messages from today
- Check-ins
Retreat Evaluation

++ (what worked well) + (what could be improved)
Thank you