

Shared Service Centers

Communication Ambassadors Update

January 24, 2012



Today's Discussion

- SSC Leadership Staff
- LAS-SSC Timeline
- LAS-SSC Staffing Plans: Waves 2 – 4
- Wave 1 Staffing
 - Financial Manager Position
- SSC Activities
- P2P Update

Recent SSC Hires

Two critical hires position the SSCs for sustainable success.



**Karla Williams:
LAS-SSC
Director**

- Previously the Director of Financial Operations and HR in the School of Business
- Hired as the Director of KU's initial SSC, meeting the HR, financial and post-award research administration needs of the College, IPSR and the Hall Center
- Joined team Dec. 24



**Nick Stevens:
Project Director**

- Brings critical research expertise and relationships to the implementation team
- Will transition the Huron team off the project by March 31
- Joined team January 6

LAS SSC Timeline – Implementation

Due to its size, the initial shared service center will be implemented in four waves.

	YEAR 1										YEAR 2
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June		Year 2
<i>Initial Site: Liberal Arts and Sciences SSC</i>											
Process Review and Design	[Bar spanning Oct to June]										
Activity Assessment	[Bar Oct]										
Leadership Committees Meet*		[Bar spanning Nov to May]									
LAS-SSC Process Review				[Bar spanning Jan to Feb]							
Wave 1: Humanities, Arts & Honors					[Bar spanning Feb to Mar]						
Wave 2: Social & Behavioral Sciences, Hall Center, IPSR							[Bar spanning Apr to June]				
Wave 3: International & CLAS Administration											[Bar Nov]
Wave 4: Natural Sciences and Math											[Bar Dec]

* The College, Hall Center and IPSR will each have a leadership committee to decide staffing.

Nov. go live
Dec. go live

The implementation timeline will be periodically reassessed and will be flexible to account for lessons learned through the initial site implementation.

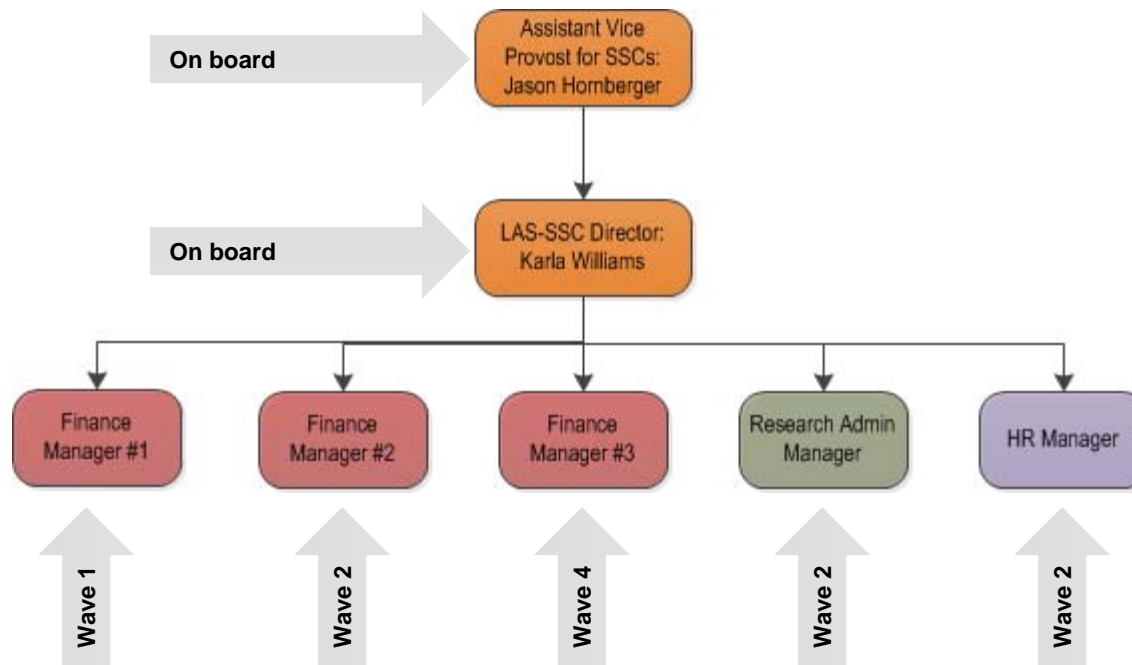
Timeline – Wave 2 - 4 Staffing

Additional LAS-SSC manager positions will be posted at the end of March once all staff for the LAS-SSC have been identified.

	LAS-SSC Wave 2 - 4 SSC Staffing										
Task / Timeframe	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov
Wave 2 Liberal Arts & Sciences SSC											
Identify Wave 2 Potential Staff • Understand staff preferences • Gather input		■									
Meetings: Wave 2 Chairs and Directors			■								
Meetings: Wave 2 Staff			■								
Determine New Departmental Responsibilities of Staff					■						
Wave 3 & 4 Liberal Arts & Sciences SSC											
Identify Wave 3 & 4 Potential Staff • Understand staff preferences • Gather input			■								
Meetings: Wave 3 & 4 Chairs and Directors				■							
Meetings: Wave 3 & 4 Staff				■							
Determine New Departmental Responsibilities of Staff							■				
Liberal Arts & Sciences SSC Manager Positions											
Hire Research Manager, Finance Manager and HR Manager Positions				■							

LAS SSC Leadership

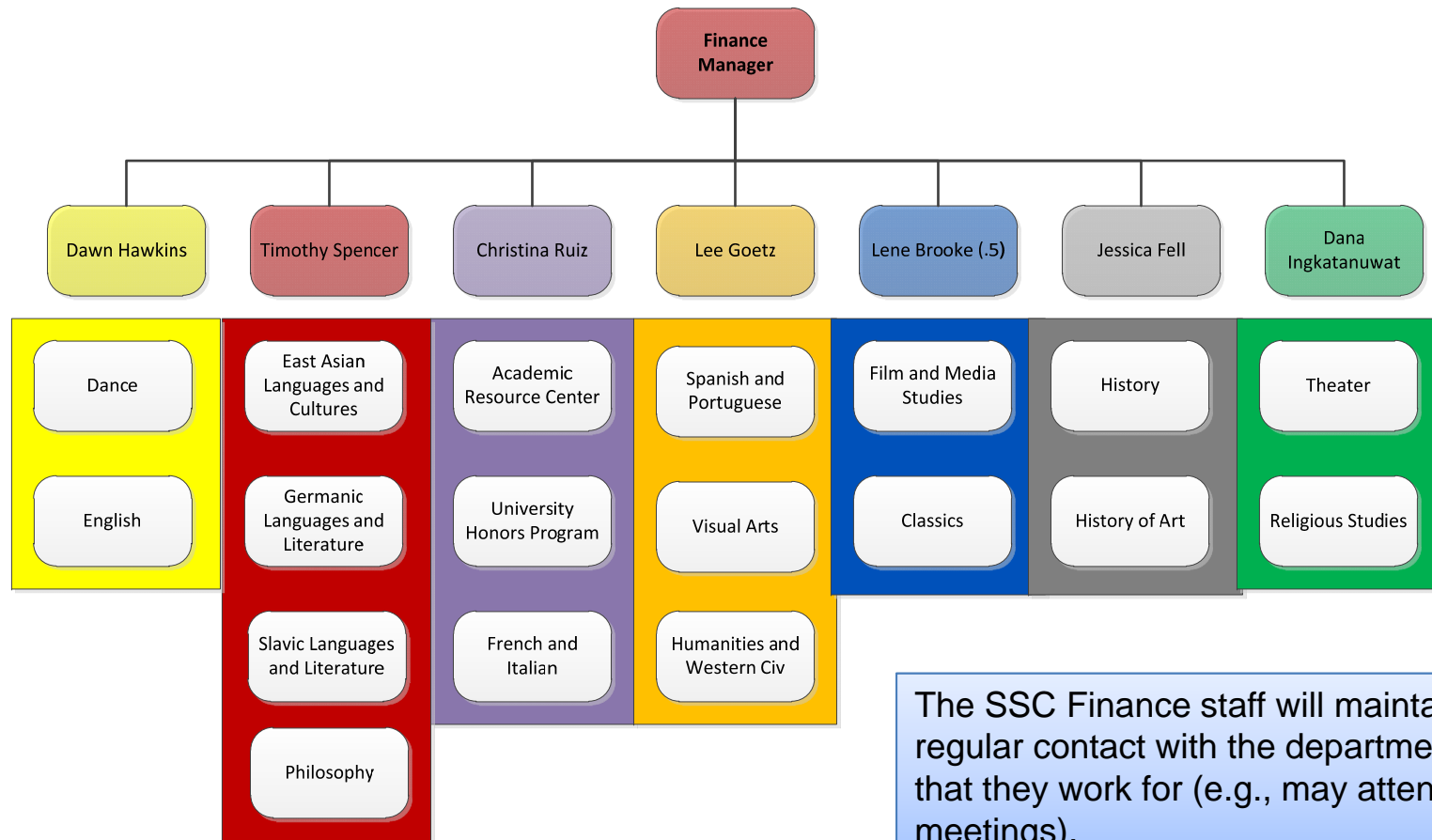
The functional managers for the LAS-SSC will be hired over the next several months.



The search for one finance manager is currently underway, the remaining manager positions will be posted after all of the SSC staff have been identified.

SSC Finance Staff

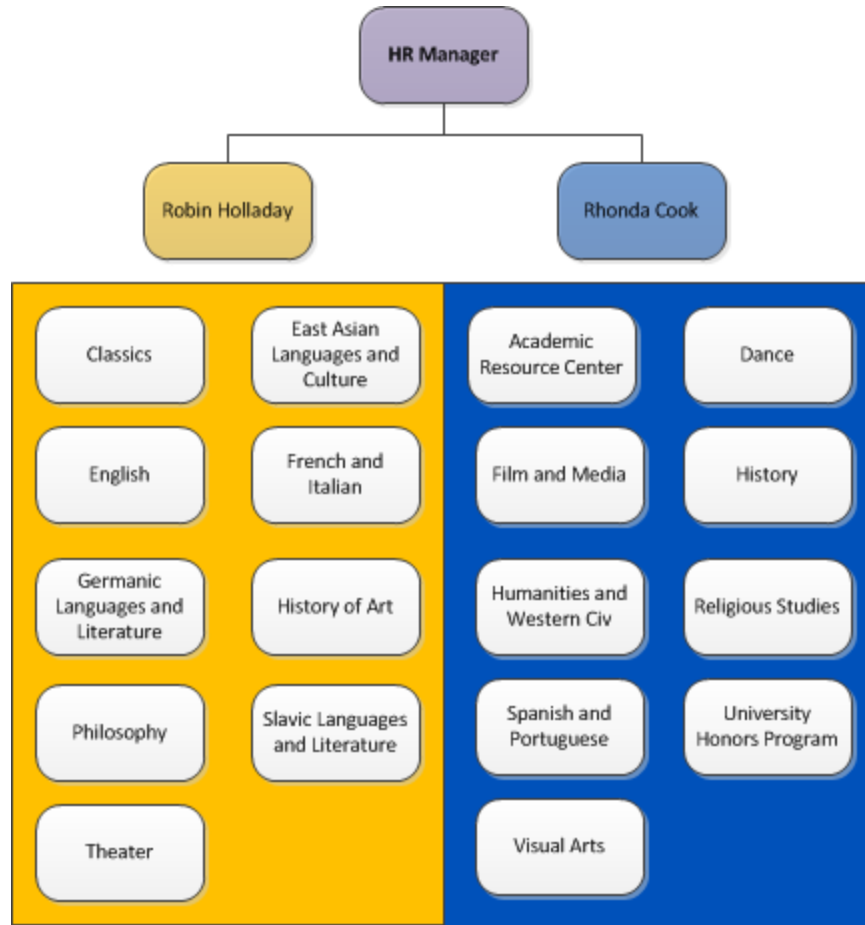
The Finance Manager position is currently posted, seeking an experienced KU hire.



The SSC Finance staff will maintain regular contact with the departments that they work for (e.g., may attend staff meetings).

SSC HR Staff

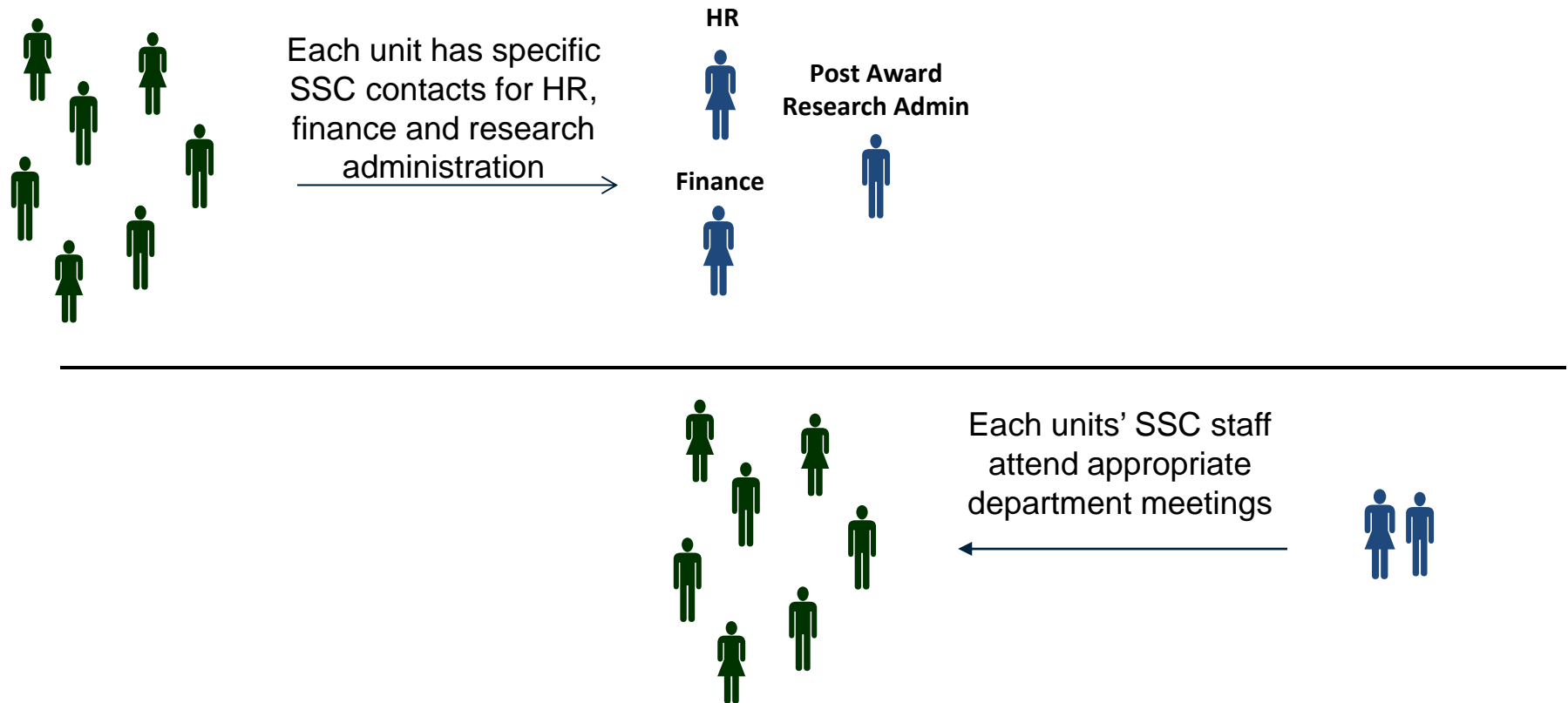
The HR Manager will be hired prior to the wave 2 go live. Until the HR Manager is hired, the HR team will report to Karla Williams and work with the ROC team.



The SSC HR staff will work closely with the SSC Finance staff and will maintain contact with the departments that they work for (e.g., may attend and support search committee meetings).

SSC Positions

Each department will have key contacts in the SSC.



Staff will have backup to cover when key contacts are on vacation or out of the office.

SSC Activities – HR

In addition to the activities currently performed by the ROC staff, SSC staff will support all of the department's HR needs.

Time Reporting and Processing	Identifying and correcting missing time, preparing certifications for work study time
Supporting the Interview Process: Faculty and Staff only*	Supporting the search committee and coordinating all needs for faculty and staff interviews
Recruiting - HR Administrative	Supporting recruitment activities, including the development of position descriptions, posting of advertisements, requesting search waivers, managing vacancy pools
Onboarding New Hires	Obtaining hiring documents and completing general KU orientation and onboarding
Departmental HR Activities	Supporting performance management (e.g., gathering and filing forms), other interacting with Central HR (such as appointment and position management and employee separation)

* GRA, GTA, and GA recruiting will continue to be conducted by the graduate program administrative staff in the departments.

SSC Activities – Finance

SSC staff will provide the accounting support that Chairs, Directors and other campus leaders need to manage their budgets.

Travel and Expense	Assisting faculty and staff with travel arrangements, creating travel authorizations, expense reports, processing reimbursement
Candidate Support/Honorarium Processing	Booking travel for visitors or candidates, collecting tax forms, contract forms, reimbursing expenses
Tuition and Scholarship Support	Keeping track of KUEA, KUCR or other departmental funds which are available for tuition or salary, processing paperwork, attending meetings with the Dean
Procurement	Processing purchase orders, vouchers, obtaining quotes or preparing RFPs
Billing and Receivables	Invoicing customers, accepting cash or check payments, arranging wire transfers from customers, SOVs, AR aging and collections (<i>In the transition of each unit, the Billing and Receivable activities for areas will be reviewed for compatibility with the SSC.</i>)
Budget Support	Meeting the budget support needs of Chairs, Deans, Directors and Budgeteers: performing budget transfers, fund transfer justifications, retroactive funding adjustments, correcting prior journal entries; providing reports and analysis as requested

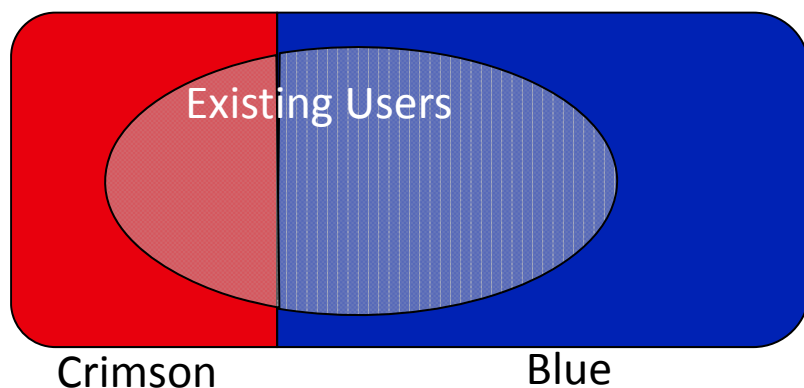
SSC Activities – Post Award Research

In addition to meeting the financial and HR transactional needs of PIs, SSC staff will provide specific post-award grant support.

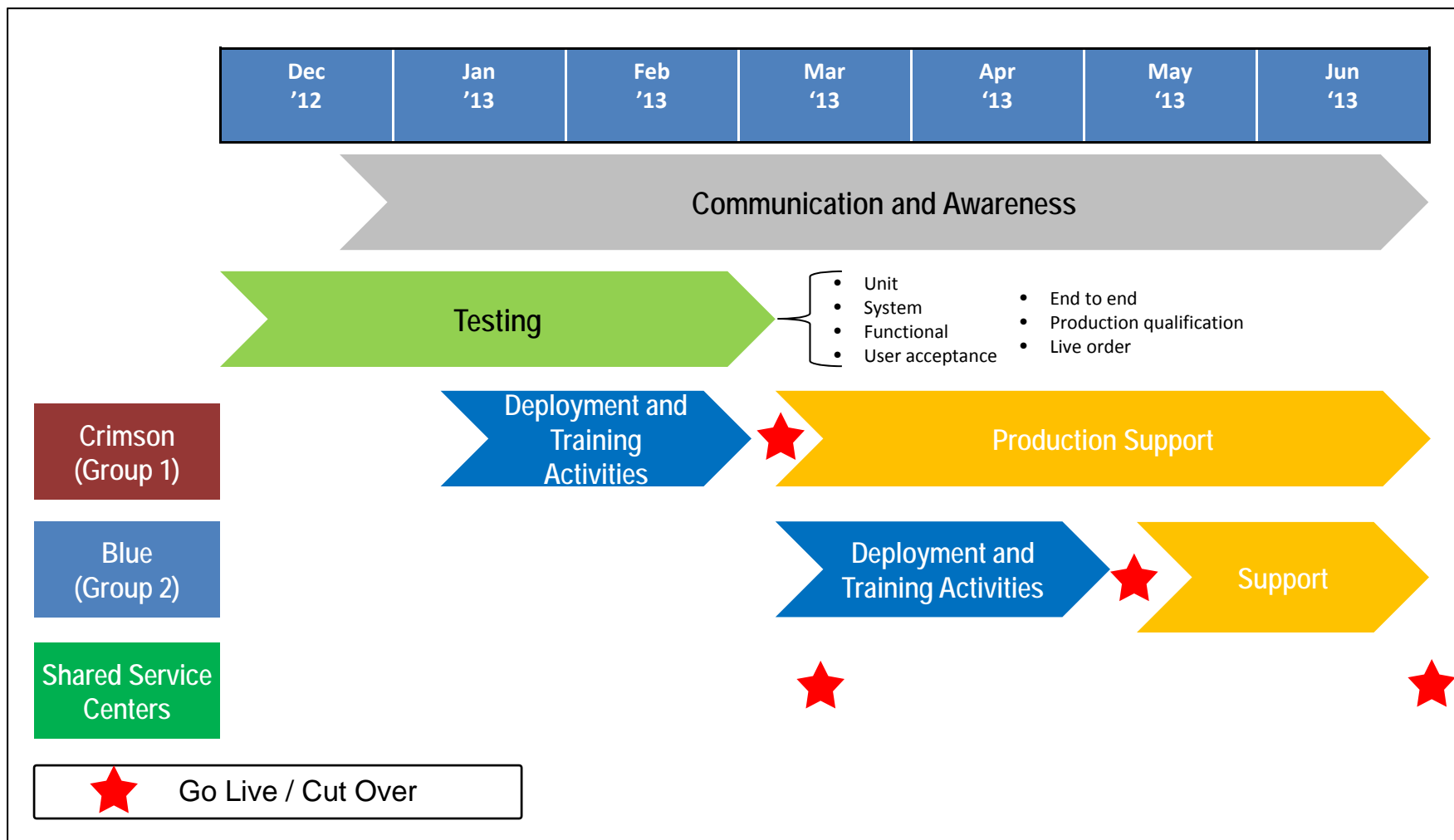
HR Transaction Needs	All HR activities previously described as SSC functions
Financial Transaction Needs	All financial activities previously described as SSC functions
Post-Award: Award Monitoring	Monitoring award balances, progress report due dates, applying for award renewal, allowability reviews and effort reporting
Post-Award: Award Modifications	Requesting no cost extensions, budget revisions, provisional requests or award closeouts
Post-Award: Cost Share	Monitoring cost share agreements for both payroll and non-payroll expenses

Deployment Approach: Key Dates

- March 11th Crimson Group Go Live
 - Shared Services Wave 1
(Humanities and Arts from Liberal Arts and Sciences SSC)
 - Research related groups
(HBC and LSI)
- May 6th Blue Group Go Live
 - Remainder of Campus
 - Existing KUPPS users not in Crimson Group



Deployment Approach: Work Streams



New Policies and Procedures Summary

- Option to assign 'self approval limits' to appropriate users (Requestors)
 - \$0
 - \$500
 - \$2,000
 - \$5,000
 - Applicable to Non-Projects transactions only
- Central Procurement
 - Formal bids limit raised for KUPPS Orders from \$5,000 to \$50,000
 - Master Service Agreements/ Supplier Pricing Agreements
 - Requisitions less than \$50,000 will be acted upon within 1 day
 - Will review new vendor requests
- No voucher logs for KUPPS orders
 - Invoices for catalog orders automatically paid if less than \$5K
 - PO Invoices for non catalog orders will be keyed by Centralized AP and approved by departments via ImageNow
 - Leverage check requests, integrated eInvoices
 - Matching tolerances of 10% / \$100
- Audit
 - Sampling methodology replaces 100% audit
 - Pre-Audit steps if greater than \$5K or Equipment

KUPPS Departmental / SSC Roles

Role	Actions / Responsibilities
Shopper (Department)	<ul style="list-style-type: none"> • Determine need • Add items to cart from Punchout / Hosted Catalogs and Non-catalog Forms • Assign carts to Requestors
Requestor (SSC)	<ul style="list-style-type: none"> • All permissions as a shopper • Receive assigned carts and add remaining requisition information (accounting information, ship to, internal notes etc.) • Submit carts into workflow (creates requisitions)
Self Approving Requestor (SSC)	<ul style="list-style-type: none"> • All permissions as a requestor • UKANS requisitions below their self approval authority, no adt'l approvals • Must ensure purchase is reasonable, allowable, allocable
Approver (Business Decision)	<ul style="list-style-type: none"> • All permissions as a shopper • Receive requisitions in KUPPS approval queues • Determines if purchases are reasonable, allowable, and allocable • Confirms and/or adds remaining accounting information • Approves Invoices via ImageNow or KUPPS (>\$5K)

Next Steps: Communications and Preparations

- Continued updates to the Budgeteer, CFO and SSC groups / forums
- Crimson Director/Chairs/Deans communications (late January)
- Town halls (early February)
 - Recommended for anyone involved in purchasing goods / services to raise awareness
 - Shoppers, Requestors, Approvers, Administrators, and Faculty
- Power User specific communications (week of 2/13)
 - To prepare data gathering / deployment activities
- Training will be provided for all KUPPS roles through a variety of methods
 - Lecture style
 - Web recordings
 - Reference documents
 - Hands on classroom

Resources

Please let others know that we are interested in hearing what they have to say!

- Next meeting: February 27th at 3:30 in the Big 12 Room of the Kansas Union
- CFE website <http://cfe.ku.edu/ssc/>
- Follow-up contacts:
 - Jason Hornberger: jfh@ku.edu
 - Nick Stevens: nickstevens@ku.edu
 - Karla Williams: kkw@ku.edu
 - Rick Beattie: rbeattie@ku.edu
 - Christy Edmonds: cjed@ku.edu
 - Megan Cluver: megancluver@ku.edu

The LAS-SSC Finance Manager position is posted on the CFE web site:
http://cfe.ku.edu/documents/ssc/jobs/LAS-SSC_Finance_Manager_PD_010913.pdf