

Shared Service Centers

Communication Ambassadors Update

September 26, 2012



Today's Discussion

- **Current Highlights and Timeline**
- **Process Improvement and Training Committees (“PITCs”)**
 - Progress
 - Activities
- **SSC Staffing**
 - Review: Staffing Plan
 - Activity Assessment
- **Wrap-up and Questions**

SSC Key Activities

- The first wave of the College is scheduled to transition to the SSC in February/March.
- Process Improvement and Training Committees (PITCs) are meeting to review current activities and to streamline processes where practical.
- Interviews will be scheduled in October for the Liberal Arts and Sciences SSC Director and Project Manager positions.
- We will ask staff in the College, IPSR and the Hall Center to participate in an activity assessment in mid-October.
- A leadership committee will meet with chairs, directors and staff to identify staff to move to the SSC, taking staff preference into account as much as possible.

In your role as a communication ambassador, we encourage you to share current event and plans with your peers. Additional information on these activities will be shared today and is on the web.

Liberal Arts and Sciences SSC – Timeline

Key milestones for implementing the Liberal Arts and Sciences SSC are projected through December of 2013.

	YEAR 1										YEAR 2
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Year 2	
<i>Initial Site: Liberal Arts and Sciences SSC</i>											
PITC Meetings	[Bar spanning Oct to June]										
Activity Assessment	[Bar Oct]										
Leadership Committee Meets		[Bar Nov-Dec]									
SSC Functional Manager Positions Posted and Filled				[Bar Jan-Feb]							
Wave 1: Humanities, Arts & Honors					[Bar Feb-Mar]						
Wave 2: Social & Behavioral Sciences							[Bar Apr-May]				
Wave 3: International & CLAS Administration										[Bar June]	
Wave 4: Natural Sciences and Math										[Bar July]	

The timing of the transition for future waves will be refined to accommodate major events, such as budget preparation and the start of the semester

The schedule allows for lessons learned to be incorporated in each subsequent wave.

Process Improvement

PITCs are examining current processes and identifying areas where we can streamline activities, remove duplicate approvals, and provide better tools.

11 Committees have been formed involving ~75 staff members:	PITC Deliverables:
<p>HR and Finance in the SSCs</p> <ul style="list-style-type: none">• Travel & Expense and Candidate Support/Honorarium Processing• Tuition & Scholarship Support• Financial Analytics/Budget Support• Billing and Receivables• Payroll• Human Resources in the Departments <p>Research Administration in the Academic SSCs</p> <ul style="list-style-type: none">• Award Modification and Closeout• Cost Transfers• Award Monitoring• Cost Share• Allowability and Invoice Processing on Grants	<ul style="list-style-type: none">• <i>Revised and documented process maps</i>• <i>Technology recommendations</i>• <i>Training guides</i>• <i>Ongoing review and continuous improvement</i>

Process Improvement and Training Committees are gathering facts in order to redesign business processes and identify any challenges to moving the activities to the SSCs.

Process Improvement

PITCs have already started reimagining key processes; identifying bottlenecks or duplication in the as-is processes; and mapping new alternatives.

Key questions the committees are exploring include:

- Are there current steps that don't add value?
- Are there steps in the current process that involve paper moving around campus?
- Are there steps in the current process where the workflow tends to stall?
- Are there duplicate processes involved?
- Are there aspects of the process with multiple approvals?
- Are there process steps that go back and forth among the departments and central?

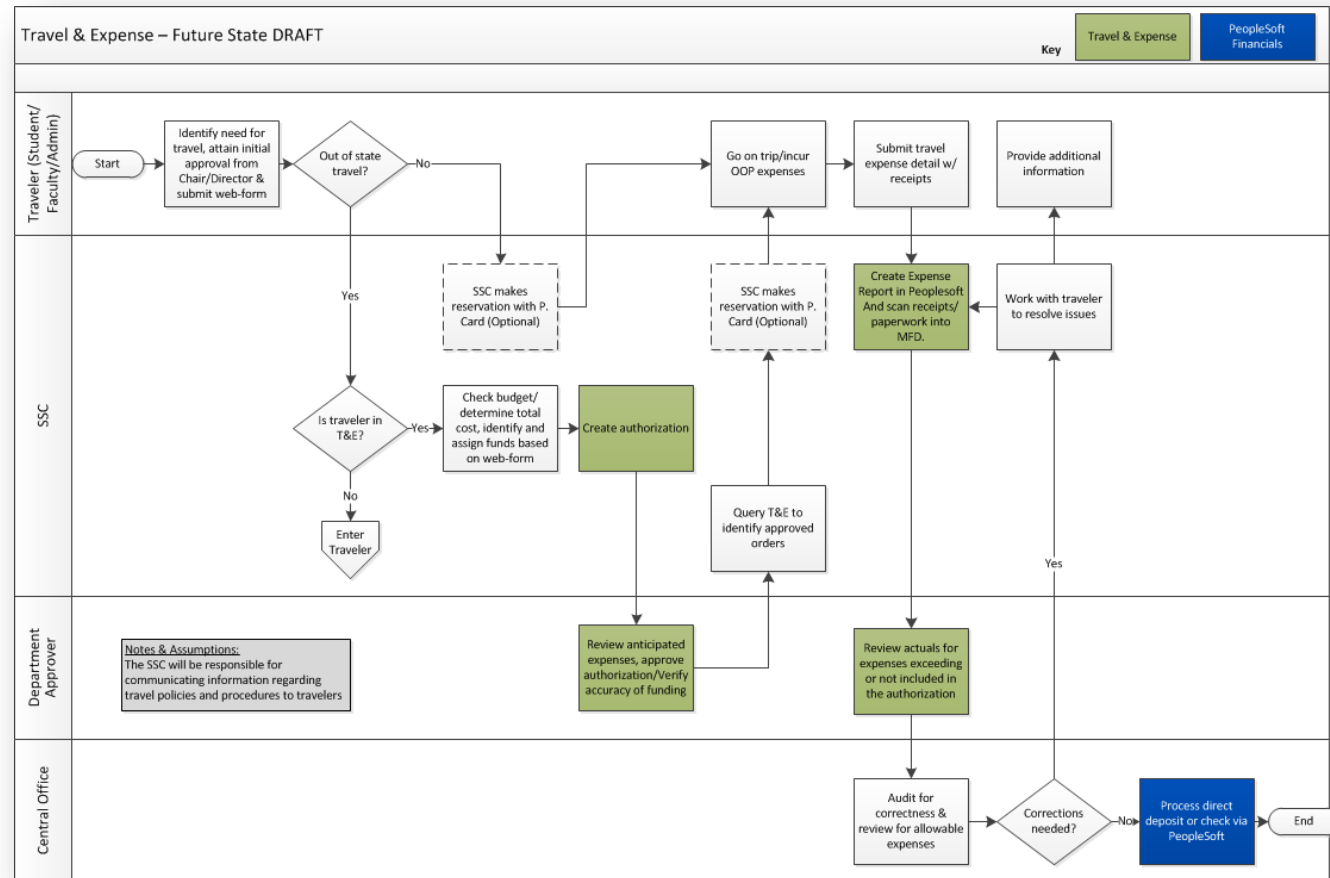
New tools and policy changes are also being considered for the SSC work.

Process Improvement – Travel and Expense Example

PITCs will continue to examine questions about the way in which work is currently done.

Questions that are being considered:

- What is the role of the SSC?
- How does the traveler communicate with the SSC?
- Can we create a standard form to request travel?
- What can be standardized among state, KUEA and KUCR travel policies?
- How do we communicate travel policy to travelers?
- Can we add workflow to notify the SSC once approved?
- How much risk is avoided by each approval step?



PITCs – Status

Process redesign is at various stages, with the research processes ready for external review on October 8.

PITC Team	Kick-Off Meeting Complete	Existing Process Mapped	Process Map Complete	SOP Complete	Policy Changes Identified	Required Skillsets Identified	Training Needs Outlined	KPIs Identified		
Travel and Expense	[Blue bar]	[Blue bar]	[Light blue bar]							
Candidate Support/ Honorarium Processing										
GRA/GTA Sponsorship										
Scholarship Process										
Fellowship Process										
Billing and Receivables										
Payroll										
HR - Recruiting	[Blue bar]	[Blue bar]					[Blue bar]	[Light blue bar]		
HR - Onboarding										
RA: Award Mod & Closeout										
RA: Cost Transfers			[Light blue bar]							
RA: Award Monitoring			[Blue bar]							
RA: Cost Share			[Light blue bar]							
RA: Allowability/Invoices			[Blue bar]					[Blue bar]	[Light blue bar]	
RA: Subcontracts										
			Kick-Off Meeting Complete	Existing State Defined	SSC Role Defined	Communication Defined	New Tools Identified	Required Skillsets Identified	Training Needs Outlined	KPIs Identified
Financial Analytics and Budget			[Blue bar]	[Blue bar]	[Light blue bar]		[Light blue bar]			
HR - Other Departmental										

Goal: complete process maps, SOPs and identify any policy changes needed by October 31.

Activity Assessment – Goals

The assessment will provide information to the leadership committee to make informed decisions about staffing in the SSCs, departments, and centers.

- An understanding of how much time is currently being spent on SSC work, to inform the staffing and expectations of the SSC.
- An understanding of how much time is being dedicated to departmental work, to ensure that we are identifying any potential gaps created by moving staff.
- Identification of areas of efficiency related to SSC work, which will help identify best practices and set benchmark metrics for the SSC.
- An initial indication of staff preferences for future work.

Activity Assessment – Structure

While we are currently focused on the initial site, this assessment will eventually be shared across campus.

- College, IPSR and Hall Center leadership will help to identify which USS and UPS employees participate in the Activity Assessment.
- Staff will come together to participate in the assessment in small groups, providing an opportunity to ask questions.
- The assessment is computer based, with implementation team members available to answer questions.
- A follow-up survey will be sent for additional information.
- The activity assessment results will be shared with each supervisor for additional input. Career preferences will only be shared with the leadership team.

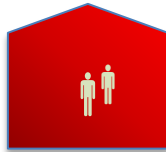
Activity Assessment – Accuracy

It is important to get an accurate representation of the work that is currently done in departments.

If we...

Overestimate the amount of SSC work and underestimate the amount of department work

Departments



Departments are understaffed

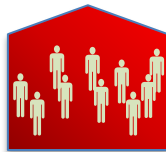


SSCs

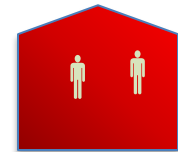


SSCs have too many staff for the available work

Underestimate the amount of SSC work and overestimate the amount of department work



Departments have too many staff for the available work



SSCs are understaffed

The activity assessment will gather information from staff who are currently doing the work so that future staffing decisions are based on an accurate understanding of what staff are doing.

Wrap Up – Key Activities

Thanks to the hard work of our committees, progress continues on SSCs implementation.

- The first wave of the College is scheduled to transition to the SSC in February/March.
- Process Improvement and Training Committees (PITCs) are meeting to review current activities and to streamline processes where practical.
- Interviews will be scheduled in October for the Liberal Arts and Sciences SSC Director and Project Manager positions.
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- A leadership committee will meet with chairs, directors and staff to identify staff to move to the SSC, taking staff preference into account as much as possible.

The project steps we have covered are critical to the success of SSCs – please help us communicate with campus by spreading the word and directing questions to the implementation team.

Resources

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

- CFE website <http://cfe.ku.edu/ssc/>
- SSC Implementation Team
 - Jason Hornberger: jfh@ku.edu
 - Christy Edmonds: cjed@ku.edu
 - Megan Cluver: megancluver@ku.edu
 - Travis Ringger: travisringger@ku.edu