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.

<table>
<thead>
<tr>
<th>YEAR 1</th>
<th>YEAR 2</th>
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<tbody>
<tr>
<td>Oct</td>
<td>Nov</td>
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<tr>
<td>Initial Site: Liberal Arts and Sciences SSC</td>
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<td>PITC Meetings</td>
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<td>Activity Assessment</td>
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<td>Leadership Committee Meets</td>
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<td>SSC Functional Manager Positions Posted and Filled</td>
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<tr>
<td>Wave 1: Humanities, Arts &amp; Honors</td>
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<td>Wave 2: Social &amp; Behavioral Sciences</td>
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<td>Wave 3: International &amp; CLAS Administration</td>
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<td>Wave 4: Natural Sciences and Math</td>
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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:

<table>
<thead>
<tr>
<th>HR and Finance in the SSCs</th>
<th>PITC Deliverables:</th>
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<tr>
<td>• Travel &amp; Expense and Candidate Support/Honorarium Processing</td>
<td>• Revised and documented process maps</td>
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<tr>
<td>• Tuition &amp; Scholarship Support</td>
<td>• Technology recommendations</td>
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<td>• Financial Analytics/Budget Support</td>
<td>• Training guides</td>
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<td>• Billing and Receivables</td>
<td>• Ongoing review and continuous improvement</td>
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<tr>
<td>• Payroll</td>
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<td>• Human Resources in the Departments</td>
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Research Administration in the Academic SSCs

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<td>• Award Modification and Closeout</td>
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<td>• Cost Transfers</td>
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<td>• Award Monitoring</td>
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<td>• Cost Share</td>
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<td>• Allowability and Invoice Processing on Grants</td>
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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.

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**
- Departments have too many staff for the available work

**SSCs**
- 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.

• 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.

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: ifh@ku.edu
  – Christy Edmonds: cjed@ku.edu
  – Megan Cluver: megancluver@ku.edu
  – Travis Ringger: travisringger@ku.edu