

Shared Service Centers

Communication Ambassadors Meeting

July 18, 2012



Agenda

- Identification of SSC Financial Process
- SSC Web Resources
- Upcoming Meetings
- SSC Opportunities

Stakeholder Input—SSC Activities

Input from across KU will guide the Steering and Design Review Committees' decision of which activities move to the SSC.



Determining SSC Activities

Common, high-volume transactions and activities are strong SSC candidates.

Framework for distributing tasks and functions

Stays in the Unit/Department

- The critical attributes of the task are unique to the department
- The outcome of the transaction is not shared by any other unit on campus
- Senior leadership judgment and decision-making at the department level are required for this aspect of the transaction and can not be addressed through a decision flow chart

Example: Advising the Dean on how to balance budget decisions and strategic priorities

Shared Service Center

- The task is transactional in nature, but requires some knowledge of internal department operations
- A similar transaction, or a transaction with the same outcome, is performed by other departments
- The transaction requires a relationship with the unit served and may require some specialized knowledge of unit policies or decision chains

Example: Paying bills

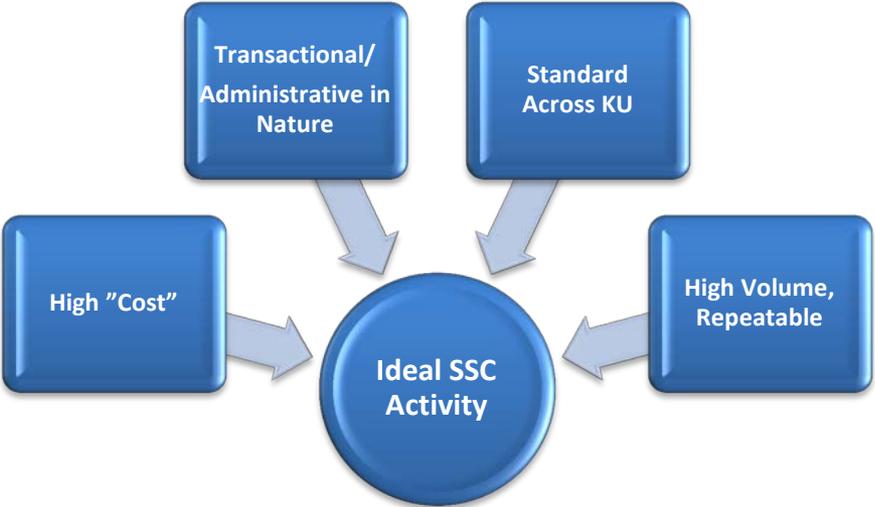
Central

- The task may be transactional or advisory in nature and can be performed with little knowledge of internal department operations
- The outcome of the transaction has limited or no impact on the department's or unit's day to day functions
- The task is a control or audit function

Example: Audit of financial transactions to ensure compliance

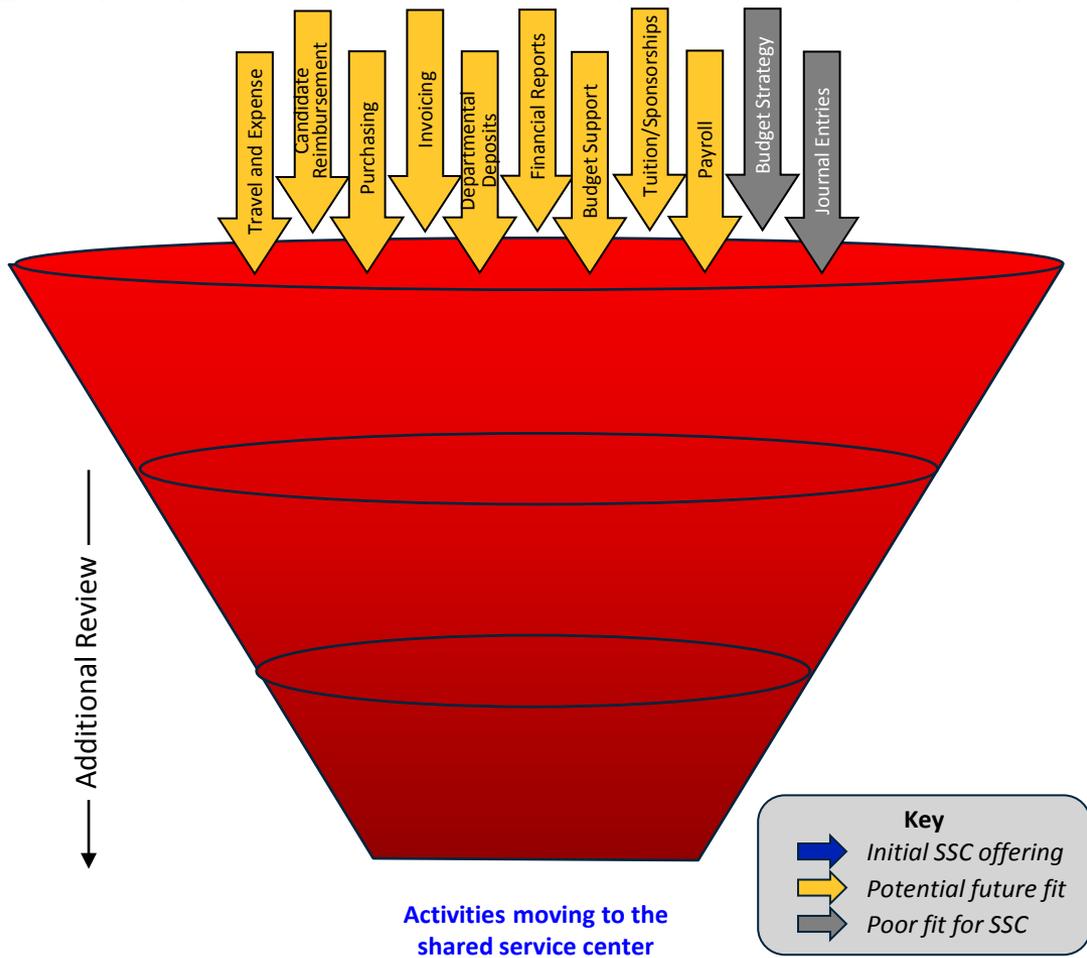
Characteristics of a SSC Activity

KU focus group will help to evaluate activities to move into the SSCs.

Ideal State: KU Shared Service Centers	<i>Four attributes help define strong SSC activities:</i>
<ul style="list-style-type: none">• Customer service orientation• Coordination with HR, Comptroller Office, IOA, Budget Office and RGS• Clearly defined roles and responsibilities that facilitate efficient and transparent services• Clearly defined processes that are supported by technology• Performance measures that can be used to track service delivery• Reporting and analytical capabilities that support departmental needs• Consistent service during established operating hours• Clear two-way communications between the center and its customers• Role as a translator or liaison between central services and the units/departments	 <p>The diagram illustrates the four attributes that define a strong SSC activity. It features a central blue circle labeled "Ideal SSC Activity". Four blue rounded rectangular boxes point towards this central circle with arrows. The boxes are labeled: "Transactional/ Administrative in Nature" (top), "Standard Across KU" (top right), "High Volume, Repeatable" (right), and "High 'Cost'" (left).</p>

Defining SSC Financial Services

The Design Review Committee and Steering Committee are considering the focus group input on the financial processes that may move to the SSC.



Evaluation begins with a large list based on KU focus groups, experience from other schools, and individual interviews.

An initial review eliminates some activities that are specific to each department and unit, or will be automated centrally in the future.

Additional KU focus groups will suggest which processes are good initial SSC candidates. Rejected processes may be considered after the SSC has achieved successful operation.

Process Improvement and Training Teams will vet current practice to identify gaps.

Remaining activities will be redesigned, creating new SOPs, processes and training.

Next Steps: Process Streamlining

The Steering Committee and the Design Review Committee will make the final decision on which activities will be performed in the SSC.

Implementation Staff

For each of the core activities identified, dedicated implementation staff will work with the functional committee teams to gather current processes, practices, procedures, and reporting in an array of schools and research centers in order to streamline them for use in the shared service centers.

Primary Roles

1 Transform Current Processes

Implementation staff will work with the committees and central departments to:

- Document “as is” processes, practices, procedures, and reporting in a array of schools, research centers and administrative units to map current practices
- Identify key differences and best practices among current processes
- Create and document new processes, practices, procedures, and reporting that will be used in the shared service centers
- Identify any additional workflow or technology changes needed to further optimize the processes, practices, procedures, and reporting
- Identify training needs for shared service centers
- Communicate findings to campus

2 Create the SSC Handbook

Implementation staff will work with the committees and central departments to create an online shared service center handbook, that will include:

- SSC job descriptions
- Staff reporting relationships
- Communication channels
- KPIs, measurement guidelines, and timelines
- Service level agreements (SLAs)

SSC Materials on the Web

Shared Service Centers

What is a Shared Service Center?

The concept of a shared service center at KU will redefine how HR, Finance and Research Administration functions are conducted at KU.

The goal of shared service centers is to reorganize some of the transaction-based activities that occur in the units and departments at KU with a focus on providing increased level of service by training shared service center staff and providing them the tools to succeed.

While some HR, Finance and Research Administration responsibilities will move to shared service centers, many current functions will remain in the departments.

The goal of the implementation is to create support functions which are efficient, timely, and based on best practice. The accountability structure for shared service centers will be designed to create an environment of continuous process improvement.

Critical goals of the shared service centers include:

- A culture of customer service to provide timely, efficient and accurate service to the departments and units served by shared service centers
- An accountability structure, including regularly assessed metrics and customer satisfaction
- An environment of professionalism, with staff having a deep understanding of the business practices underlying the tasks they perform—reduced errors and processing times will create efficiencies at both the departmental/unit level and the central offices

KU will develop a regional shared service center model, with each of the 9 centers distributed around campus serving a specific group of customers.

Universities Developing and Implementing Shared Service Centers

Many universities have implemented, or are in the process of implementing, shared service centers.

Click on the university logos below to learn more.

Initial Stages > Full Implementation > Maturity

Project Resources

- Project Timeline
- Meeting Calendar
- KU Model
- Town Hall
- Huron Shared Service Centers Report
- Project Team
- Project Benefits
- Feedback & FAQs
- Bold Aspirations
- Shared Service Documents
- Shared Services in the News

<http://cfe.ku.edu/ssc/>

- [Calendar of meetings](#)
- [Committee charters](#)
- [FAQs and feedback](#)
- [Case studies and background](#)
- [Links to peer implementations](#)

Brown Bag Lunch Series

A series of meetings will be held over the next two months to share information. Times and locations will be posted on the SSC calendar.

1. Oregon State Visit – Report
2. Student Services Unit SSC
3. Coping with Change in Turbulent Times
4. Higuchi Biosciences Center – an SSC model
5. Processes to be Reviewed: Financial & HR
6. Life Skills for Navigating Change
7. Recruiting Plans for the Liberal Arts and Sciences SSC

Resources

- 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