Finance Process Improvement & Training Committee Charter

Committee Name	Finance Process Improvement & Training Committee
Objectives	The objectives of the Finance Process Improvement and Training Committee (PITC) are to: • Support the redesign of the processes, standard operating procedures and training for the financial responsibilities of shared service centers
Key Activities	• For each of the core activities that will move to the centers, help determine and document processes, practices, procedures, and reporting guidelines for the initial SSC's processes • Support the creation of new processes, practices, procedures, and reporting guidelines that will be used in the shared service centers • Identify any additional workflow or technology changes needed to further optimize the processes, practices, procedures, reporting and work with the Transition Planning and Space committee to ensure this is worked into implementation • Provide recommended training guides for the new process rollout • Identify skills needed for staff to perform these functions • Provide ongoing review and continuous improvement of processes once the SSC is operational
Scope	• The Committee is charged with supporting the identification, documentation, and creation of the standard operating procedures and training for the shared service center.
Critical Assumptions	The following are key assumptions for successful project execution: • New processes will represent best practice, utilizing workflow solutions and systems capabilities • Training will be provided to both the SSC staff as well as the customers of the SSC • Successful implementation will depend heavily on strong communication and change management practices, in addition to thorough data analysis and design efforts
Timeline	• Will meet extensively through late summer and early fall 2012. • Initial process redesign and Steering Committee approval should be obtained by the end of September 2012 in order to inform the activity assessment that will be complete in the College in October • Training materials, SOP (manuals), required skillset and task list must be complete by mid-December 2012 in order to enable the hiring of SSC staff for the initial wave of the Liberal Arts and Sciences SSC, which will go live in the end of February 2013
Deliverables	Key Deliverables: • Flowcharts and standard operating procedures documenting key fiscal processes in a SSC model • Recommended policy changes (for consideration by SSC Steering Committee) • Skillset and task lists, training plans and materials for new shared service center employees • Training plans and materials for new shared service center employees

Huron Team Member Responsibilities	• Huron will use data collected from systems, shadowing sessions, and focus group meetings to inform and provide support to the Committee • Huron will provide insight on best practices • Huron will assist in the creation of process flowcharts, standard operating procedures, online training manual, and job descriptions • Huron will attend meetings with the Finance Process Improvement & Training Committee to provide viewpoints and recommendations as questions/issues arise
KU Team Member Responsibilities	The Finance Process Improvement and Training Committee members will be expected to perform the following tasks: • Developing materials such as process flows, standard operating procedures, job descriptions and training manuals • Facilitate progress through participation in meetings • Promote the concept of Shared Service Centers in the KU community; encourage cooperation through ambassadorship • Generate ideas to help overcome obstacles as they arise • Provide leadership, expertise and insight • Be open and transparent when reporting progress • Provide understanding, interpretation, and articulation of KU culture, policies, and procedures
Guiding Principles for All Team Members	Throughout this process, all team members will participate with these guiding principles in mind: • Put personal and departmental agendas aside and focus on what is best for the University of Kansas • Be open to make changes to current business processes and existing service relationships • Ensure implementation changes are in line with industry best practices, allow for future growth, and are sustainable over time • Establish trust by showing compassion and maintaining confidentiality • Adhere to project timelines