

Shared Service Centers

Communication Ambassadors Update

November 29, 2012



Today's Discussion

- **SSC Positions**
- **Liberal Arts and Sciences SSC**
 - SSC Director
 - Staffing Numbers
 - Space
- **SSC Processes: P2P Update**
- **Current Highlights**
- **Wrap-up and Questions**

SSC Positions

Staff across shared service centers will have standard job descriptions.

- A subgroup of the SSC Steering Committee is developing standardized SSC positions.
- SSC staff will have opportunities for career progress through a variety of paths.
- The subgroup also reviewed the titles for the SSC leadership position titles:
 - Each SSC will be led by a SSC Director
 - Functional staff within the SSC will report to HR Managers, Finance Managers, or Research Administration Managers

SSC Campus Leadership

Leadership has been determined, with the Assistant Vice Provost and the SSC Director for the LAS-SSC identified.

Position	Description	Activities
Assistant Vice Provost for SSCs	<ul style="list-style-type: none"> On-boarded early in implementation and charged with overall project oversight, design, and implementation 	<ul style="list-style-type: none"> Reports to the Vice Provost for Administration and Finance Responsible for the overall execution of Service Level Agreements Responsible for maintaining a network of information sharing among SSCs, ensuring the propagation and maintenance of best practices through training and communication Accountable for the customer service of the SSCs
Administrative Assistant –SSC	<ul style="list-style-type: none"> New position Ideally hired from existing staff or may be shared administrative support from existing central administration 	<ul style="list-style-type: none"> Supports the Assistant Vice Provost for SSCs
SSC Directors (one per SSC)	<ul style="list-style-type: none"> Ideally hired from existing staff 	<ul style="list-style-type: none"> Reports to the Assistant Vice Provost for SSCs Dotted line responsibility to the deans and administrative heads of the units, centers and schools served by the SSC Responsible for the execution and maintenance of SLAs Accountable to customers; responsible for maintaining relationships Responsible for ensuring the training of SSC staff, working with central offices and Dean or Director of the areas served

SSC – Finance Team

Finance positions are modeled after the current position structure of the Student Services Business Offices team.

Position	Description	Activities
Finance Manager (supervise 5-9 financial staff)	<ul style="list-style-type: none"> Ideally hired from existing staff 	<ul style="list-style-type: none"> Reports to the SSC Director Dotted line responsibility to the Central Finance Offices Dotted line responsibility to the areas served; responsible for implementing relevant policies and procedures of the academic, research, administrative or other areas that are served Within their SSC, responsible for the execution and maintenance of Finance SLAs and supervision of Finance SSC staff Work with the Central Offices to execute training of SSC Finance staff Networked to Finance Managers in other SSCs through monthly or quarterly meetings to share best practices, update business processes and troubleshoot issues Networked to Central Finance through monthly or quarterly meetings to capture policy and procedure changes Responsible for implementing all policy and procedure changes with guidance from Central Finance
Accountant	<ul style="list-style-type: none"> Transferred from existing staff Allow for levels within this position: may supervise staff, add research support or increase the complexity of the departments served 	Provide all finance support to departments, possibly including (responsibilities may vary): <ul style="list-style-type: none"> Manage a combination of funds Prepare reports (e.g. tracking expenditures against budgets) and meeting with the chair/director or other head of the units they are working for Supervise Accounting Specialists (1-2) Perform accounting work for Grant Coordinators
Accounting Specialist	<ul style="list-style-type: none"> Transferred from existing staff 	<ul style="list-style-type: none"> Perform travel and expense, purchasing and/or AR transactions for specific departments Generally dedicated to departments or areas which individually have high transaction needs Support Grant Coordinators in the Research SSCs

SSC – HR Team

HR positions are modeled after the current ROC team, but will have additional responsibilities added.

Position	Description	Activities
<p>HR Manager (supervises 5- 9 HR staff)</p>	<ul style="list-style-type: none"> Ideally hired from existing staff 	<ul style="list-style-type: none"> Reports to the SSC Director Dotted line responsibility to Central HR and IOA Dotted line responsibility to the areas served; responsible for implementing relevant policies and procedures of the academic, research, administrative or other areas that are served Within their SSC, responsible for the execution and maintenance of HR SLAs and supervision of HR SSC staff Work with Central HR offices to execute training of SSC HR staff Networked to HR Managers in other SSCs through monthly or quarterly meetings to share best practices, update business processes and troubleshoot issues Networked to central HR through monthly or quarterly meetings to capture policy and procedure changes Responsible for implementing all policy and procedure changes with guidance from central HR offices
<p>HR Coordinator</p>	<ul style="list-style-type: none"> Transferred from existing staff Includes current ROC staff to be transferred to the SSCs 	<p>Senior HR position:</p> <ul style="list-style-type: none"> Manage the recruitment process for all employees (work with appropriate offices, e.g., Provost) Supports customers to develop position descriptions, recruitment plans and materials Facilitates job openings, coordinating search activities (posting ad copy, coordinating search committees, reviewing application materials on behalf of hiring departments, consults and/or serves on employee selection committees)
<p>HR Program Assistant</p>	<ul style="list-style-type: none"> Transferred from existing staff Includes current ROC staff to be transferred to the SSCs 	<p>Entry level HR position, assist HR Recruitment Coordinators with:</p> <ul style="list-style-type: none"> recruiting and staffing of appointments onboarding new employees time and leave reviewing assisting units with staffing needs especially in student related recruitment, equal opportunity tracking, updating new employee welcome and orientation program for campus, and training

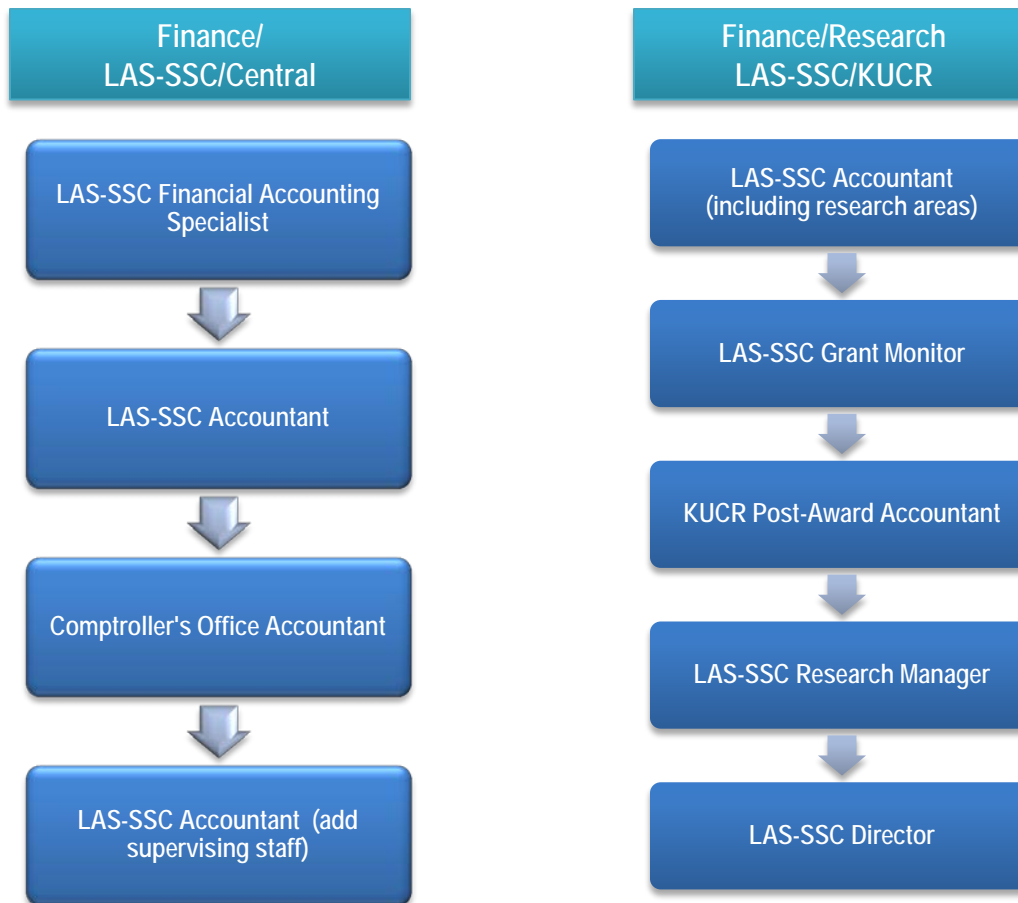
SSC – Research Team

Research Administration positions are designed to interface with the HR and Finance teams to seamlessly meet the needs of PIs.

Position	Description	Activities
<p>Research Administration Manager (supervises 5- 9 research administration staff)</p>	<ul style="list-style-type: none"> Ideally hired from existing staff 	<ul style="list-style-type: none"> Reports to the SSC Director Dotted line to KUCR Dotted line responsibility to the areas served; responsible for implementing relevant policies and procedures of the academic, research, administrative or other areas that are served Within their SSC, responsible for the execution and maintenance of RA SLAs and supervision of RA SSC staff Execute training of SSC RA staff Networked to RA Managers in other SSCs through monthly or quarterly meetings to share best practices, update business processes, and troubleshoot issues Networked to KUCR through monthly or quarterly meetings to capture policy and procedure changes Responsible for implementing all policy and procedure changes at the direction of KUCR
<p>Grant Coordinator</p>	<ul style="list-style-type: none"> Transferred from existing staff 	<p>Senior RA position, serve PIs in the Research SSCs with complex sponsored post-award research needs (based on portfolio):</p> <ul style="list-style-type: none"> Proactive budget monitoring and support Work with SSC Accountants, Accounting Specialist and HR Program Assistants to complete the transactional needs of the PI
<p>Grant Monitor</p>	<ul style="list-style-type: none"> Transferred from existing staff 	<p>Entry level RA position, serve PIs in the Academic SSCs and/or PIs in the Research SSCs with post-award sponsored research needs (based on portfolio):</p> <ul style="list-style-type: none"> Proactive budget monitoring and support Work with SSC Accountants, Accounting Specialist and HR Program Assistants to complete the transactional needs of the PI

Possible SSC Career Progress (Samples)

SSC staff can progress within a functional area, across functional areas, and among SSCs.



Director – LAS SSC

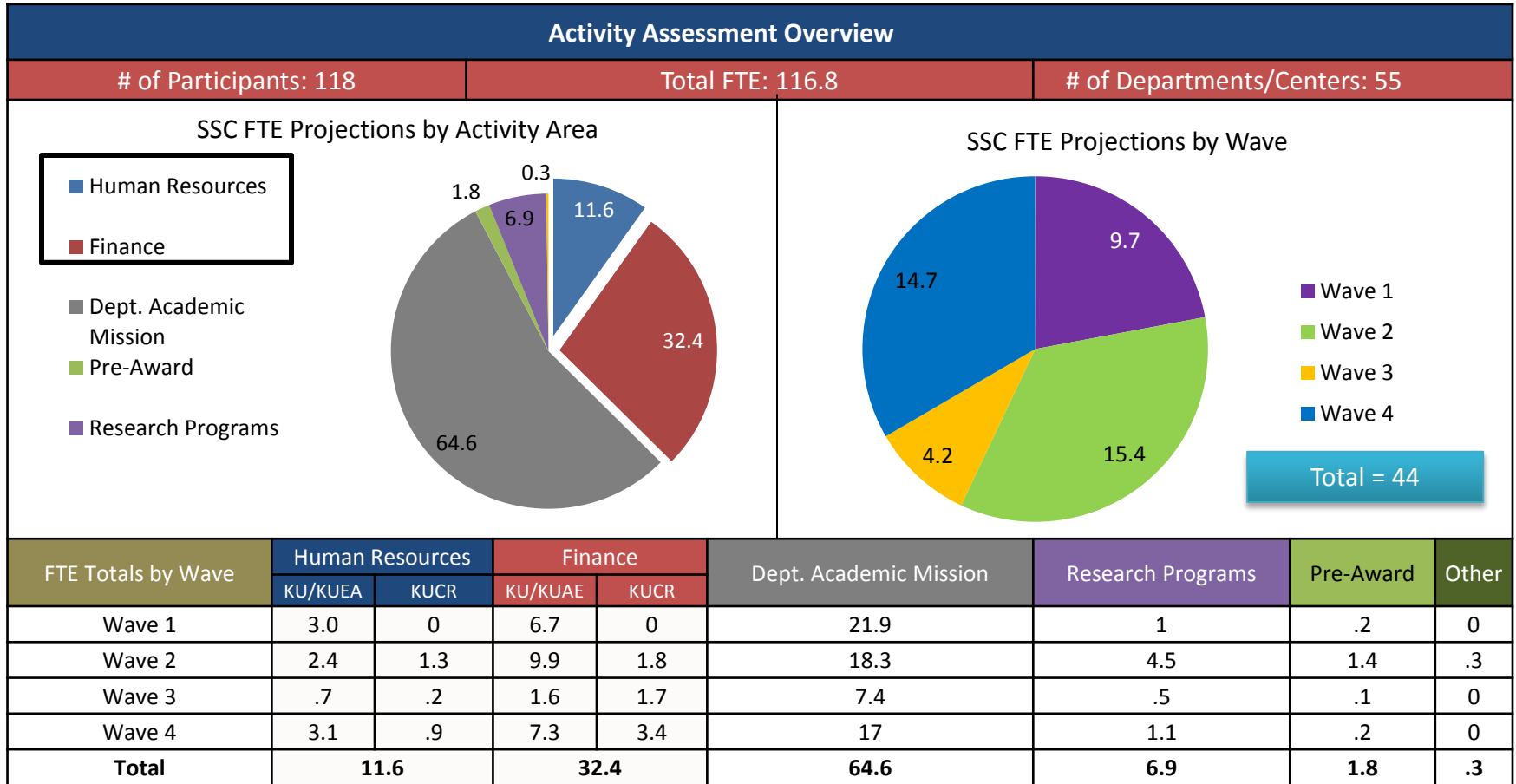
Karla Williams accepted the position of Director of the Liberal Arts and Sciences SSC.

- 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
- Transition plan during December



Activity Assessment – Overview

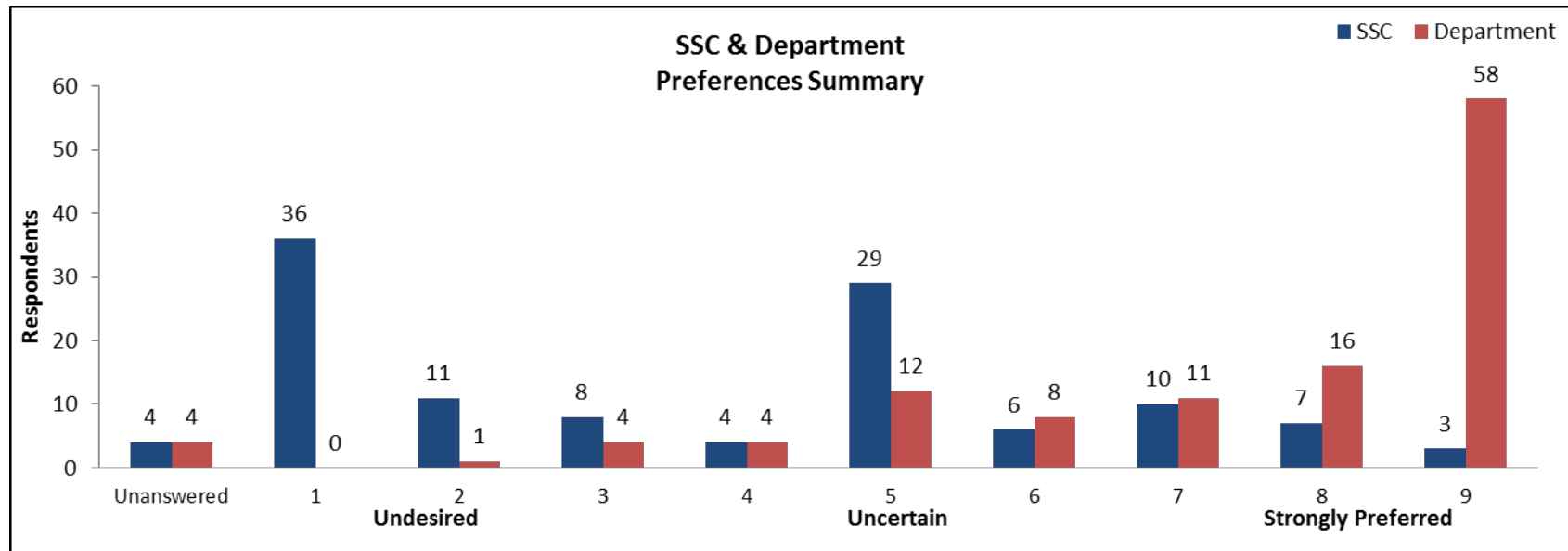
118 employees from 55 departments and centers were surveyed to estimate the time spent completing various activities to help inform SSC staffing needs.



Preferences Assessment Overview

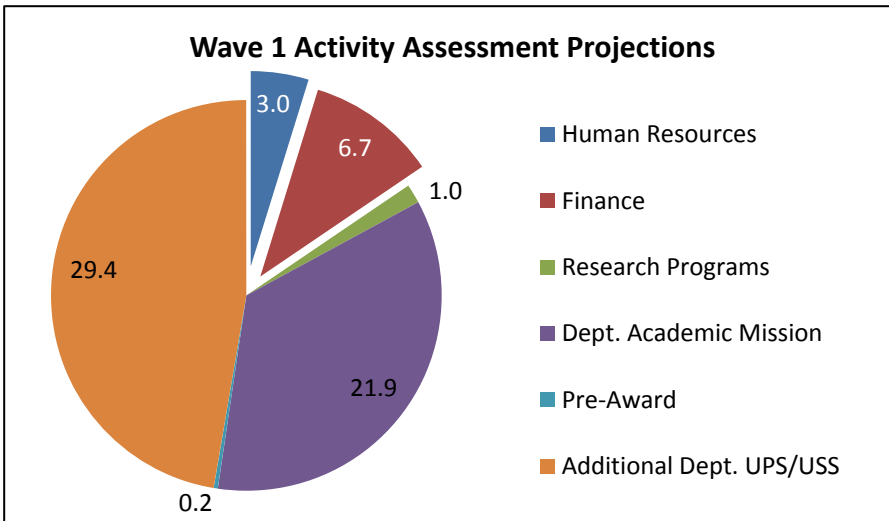
Initial results of the Preferences Assessment indicate that, despite the limited information shared, there are 20 staff members interested in positions in the SSC.

SSC vs. Department	7 to 9	5 to 6	1 to 4	Unanswered	Total
SSC Preference	20	35	59	4	118
Dept. Preference	85	20	9	4	118
Activity Area Preference	7 to 9	5 to 6	1 to 4	Unanswered	Total
Finance work	51	26	34	7	118
HR work	41	29	43	3	118



Wave 1 Activity Assessment Overview

Wave 1, Humanities and Arts and Honors, is estimated to initially require 3.0 FTE in HR and 6.7 FTE in finance to maintain current service levels.



SSC Wave 1 – FTE Projection	FTE	
	KU/KUEA	KUCR
Human Resources (State/Research)	3.0	0
Finance (State/Research)	6.7	0
SSC Wave 1 FTE	9.7	
Department/Center – FTE Projection	FTE	
Dept./Center Academic Mission	21.9	
Research Programs	1.0	
Pre-Award	0.2	
Dept./Center Wave 1 FTE	23.1	






Wave 1 Overview	
# of Activity Assessment Participants	33
Additional Dept. UPS/US (FTE)	29.2
# of Departments/Centers	19
Wave 1 Departments/Centers	
<ul style="list-style-type: none"> Classics Dance East Asian Languages and Cultures English Ermal Garinger Academic Resource Center Film and Media Studies French and Italian Germanic Languages and Literatures Hall Center for the Humanities 	<ul style="list-style-type: none"> History History of Art Humanities and Western Civilization Philosophy Religious Studies Slavic Languages and Literatures Spanish and Portuguese Theatre University Honors Program Visual Art

*Institute for Digital Research in the Humanities is included in the College's organization chart, but it is not included in this analysis because its transactions are processed through KU Libraries.

Note: Finance time includes .6 FTE identified outside of the Activity Assessment for finance work currently being performed for Visual Arts.

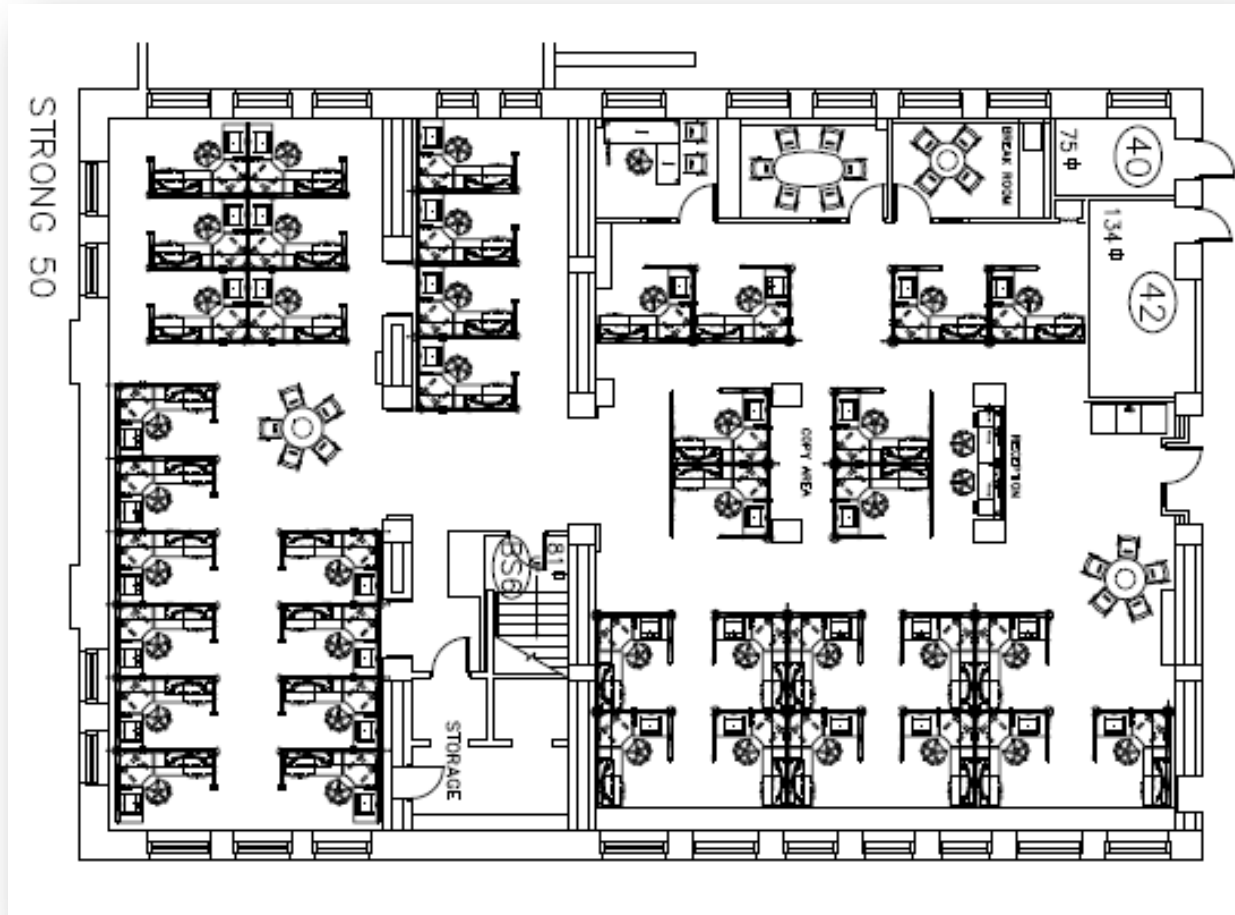
Space – Liberal Arts and Sciences SSC

Space has been identified in Strong Hall for the Liberal Arts and Sciences SSC.

Top Criteria for SSC Space				
<p>1</p>  <p>Availability</p>	<p>2</p>  <p>Size</p>	<p>3</p>  <p>Desirability</p>	<p>4</p>  <p>Longevity</p>	<p>5</p>  <p>Geography</p>
<ul style="list-style-type: none"> Space at KU is in high demand; the choices for housing the SSC will be limited. 	<ul style="list-style-type: none"> A key success factor for the SSC is the ability to house all of the HR, Finance and Grant Administration staff in one location. 	<ul style="list-style-type: none"> Staff are being asked to move to a new location; welcoming space that facilitates the work should be identified. 	<ul style="list-style-type: none"> Moving to a new location is time consuming and distracting; we would like to identify space that will be a permanent home for the SSC. 	<ul style="list-style-type: none"> While increased use of technology will minimize the need for customers to visit the SSC, a convenient location with respect to the customers will help to maintain relationships between SSC staff and the customers they serve.

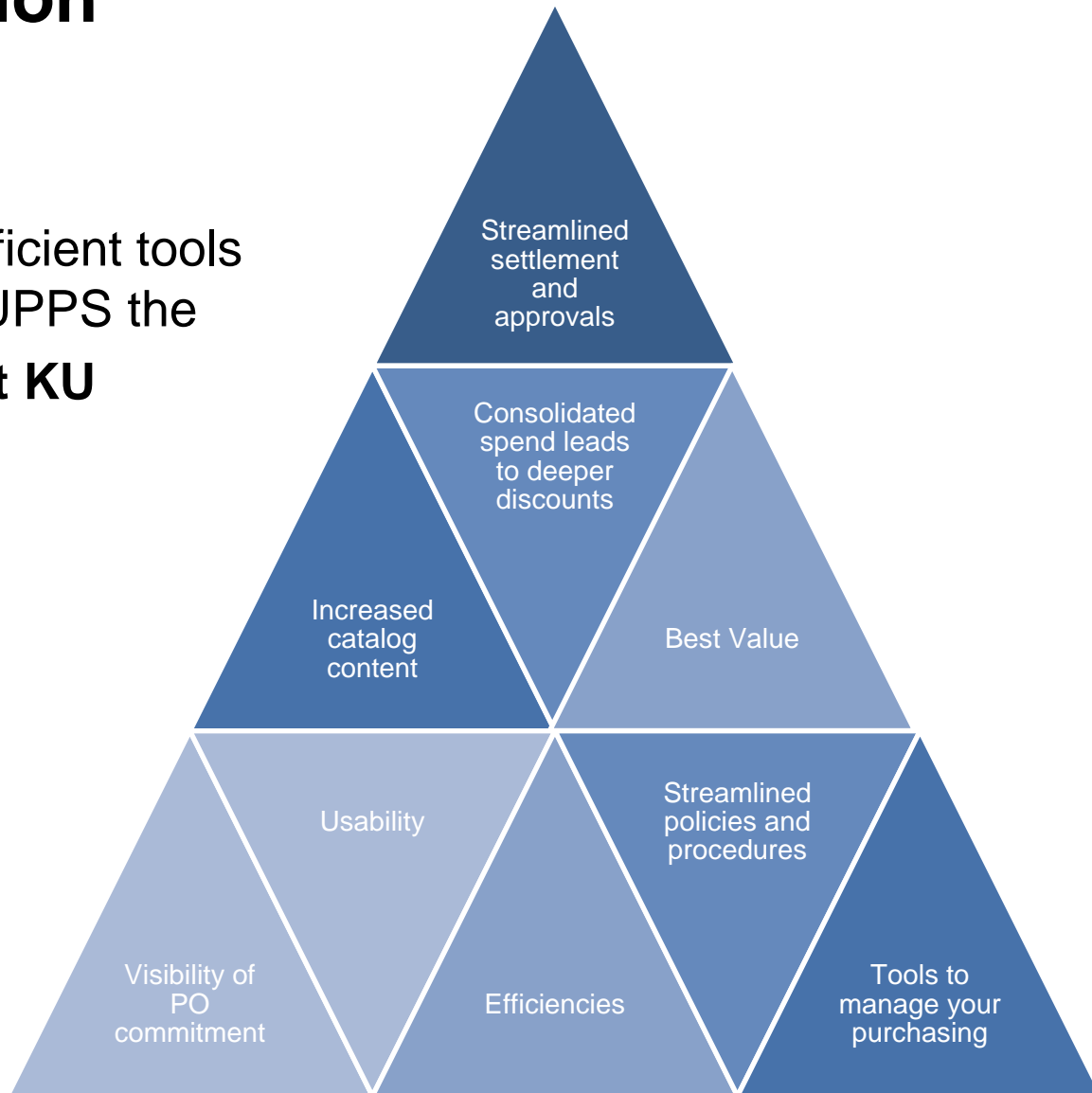
Space – Liberal Arts and Sciences SSC

The Strong Hall space is a unique campus location that meets all of the needs of the LAS-SSC.



KUPPS Optimization

We focused on creating efficient tools and processes to make KUPPS the **easiest way to procure at KU**

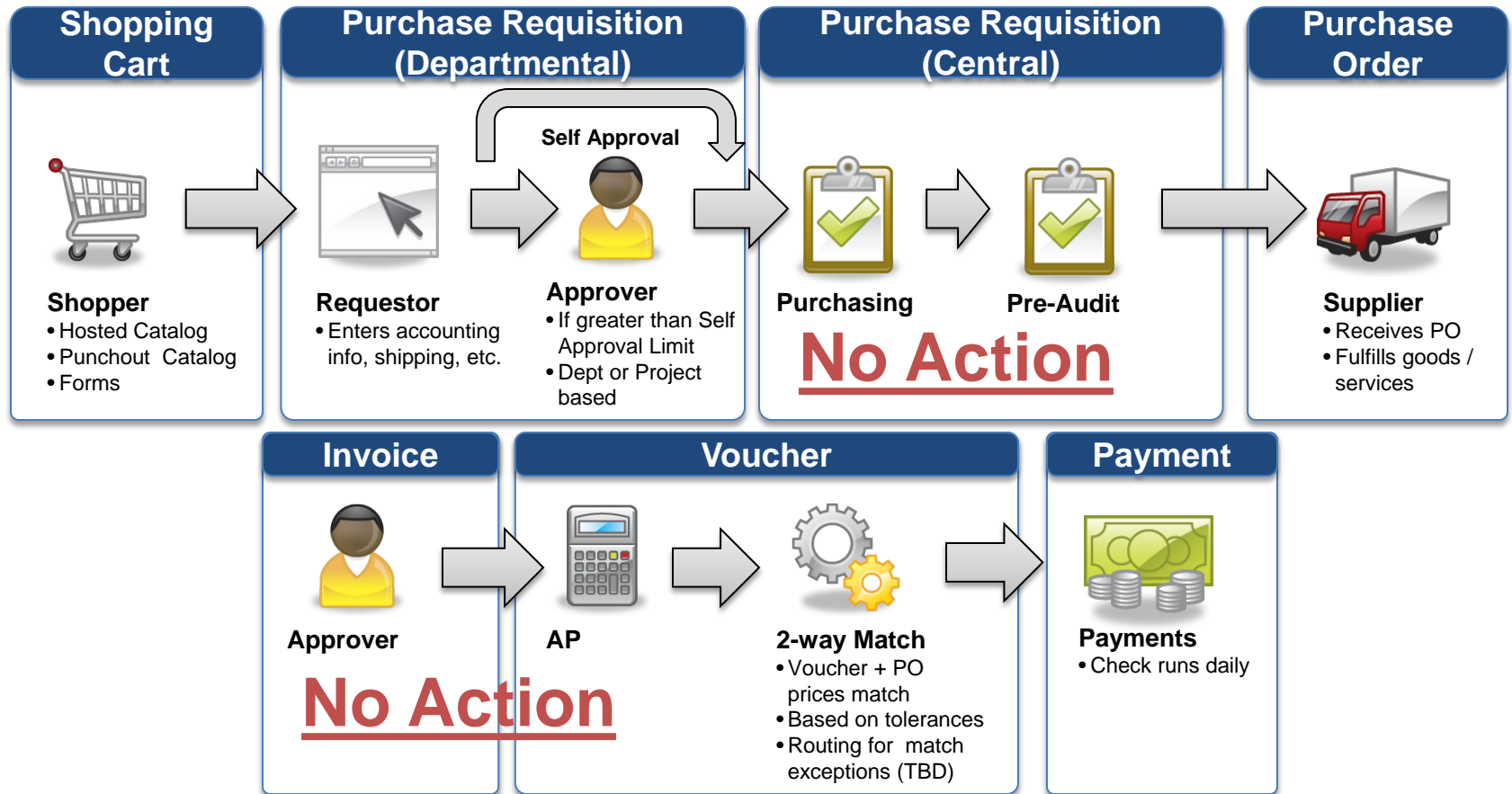


New Policies and Procedures Summary

- Department option to assign 'self approval limits' to appropriate users
- No voucher logs for KUPPS orders
 - Invoices for catalog orders automatically paid if less than \$5K
 - Invoices for non catalog orders will be keyed by Centralized AP and approved by departments via automated workflow
- Central Procurement
 - Formal bids limit raised from \$5,000 to \$50,000
 - Goal is to act upon requisitions less than \$50,000 within 1 day
- Audit
 - Sampling methodology replaces 100% audit
 - Pre-audit steps if greater than \$5K

Procure to Pay Transaction Overview

Catalog < \$5K



Next steps

- Ongoing coordination with the pilot SSC leadership starting in December
 - Vet KUPPS solution
 - Tailor business processes with pilot SSC and departments
 - Work with pilot SSC to prepare for go live
- P2P Town Halls will be conducted across campus in early 2013

SSC Key Activities

- An estimated 44 staff will transition from the College, IPSR and the Hall Center into the SSC; this represents just over 12% of the USS and UPS staff in these areas.
- Strong Hall 50 has been identified for the Liberal Arts and Sciences SSC, and will be ready for move in mid-February.
- Karla Williams has been hired as the Liberal Arts and Sciences SSC Director and will transition into this role by the end of December.
- Initial SSC positions have been developed.

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

Resources

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

- Next meeting: December 20
- 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