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.

Focus Group Input

Individual Interviews

Peer Best Practice

KU Feedback: Website, Survey, etc.

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
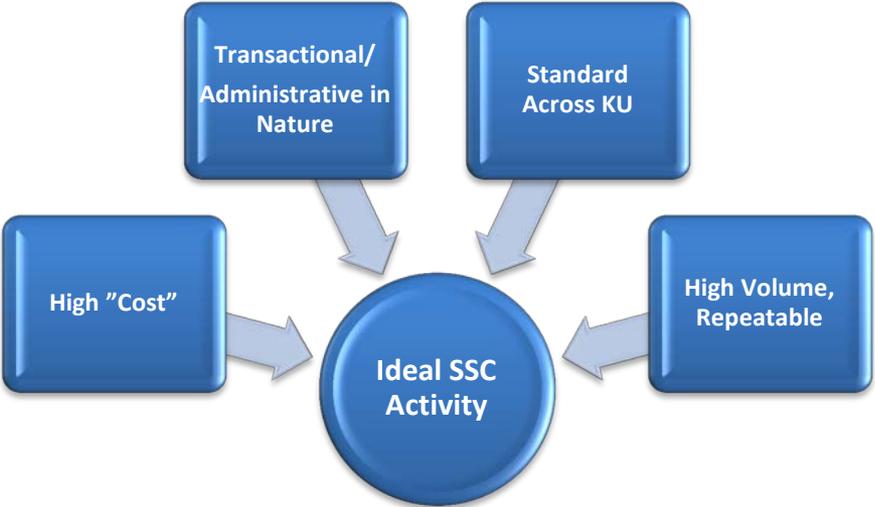
Example: *Paying bills*

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*
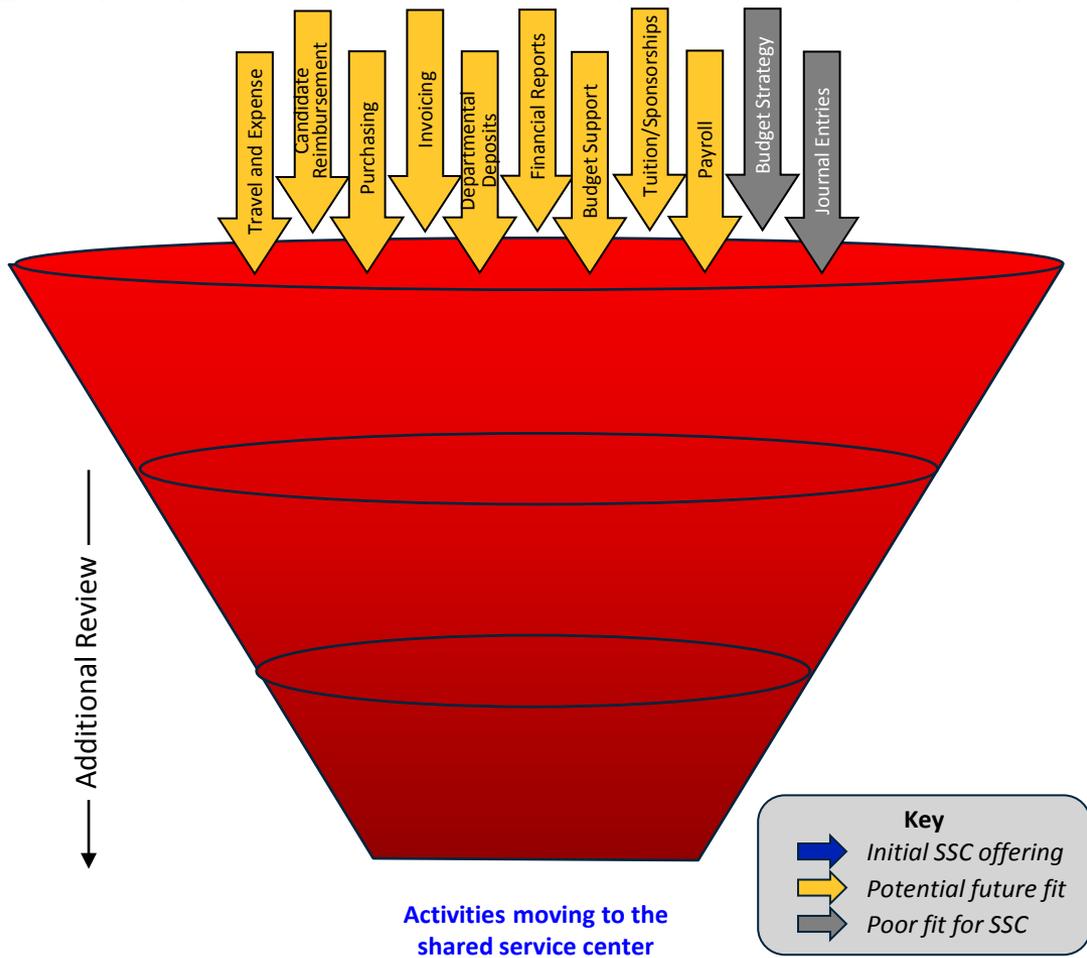
Characteristics of a SSC Activity

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

Ideal State: KU Shared Service Centers	Four attributes help define strong SSC activities:
• 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	Transactional/Administrative in Nature — Standard Across KU — High "Cost" — High Volume, Repeatable → Ideal SSC Activity

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.

Travel and Expense
Candidate Reimbursement
Purchasing
Invoicing
Departmental Deposits
Financial Reports
Budget Support
Tuition/Sponsorships
Payroll
Budget Strategy
Journal Entries

Additional Review

Activities moving to the shared service center

Key
Initial SSC offering
Potential future fit
Poor fit for 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.

THE UNIVERSITY OF KANSAS

Rock Chalk, JAYHAWK!

Next Steps: Process Streamling

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

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