

# Shared Service Centers

Metric Tracking

April 2013



# SSC Metrics Overview

There are a number of key activities to successfully develop, track, and analyze metrics for the SSCs.

Development	Tracking	Analysis
<ul style="list-style-type: none"> <li>• Drill down capabilities: metrics need to capture high-level and specific process components</li> <li>• Measures need to apply to processes within the control of the SSC, while also recognizing the impact on CFE goals</li> <li>• Target goals/expectations need to be more specifically defined after the SSCs go live</li> </ul>	<ul style="list-style-type: none"> <li>• Automated reports need to be developed for various metric “owners” to support management decision making</li> <li>• Some manual tracking may be necessary in early stages to capture complete picture</li> <li>• Baseline metrics from current operations need to be documented for future analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Metrics need to have clear owners charged with the responsibility to improve performance</li> <li>• Review schedules need to be developed for each metric</li> <li>• KPI analysis will need to be combined with Satisfaction Surveys to provide a complete picture of how SSC units are performing</li> </ul>

## Activities performed by SSCs that require metrics for performance tracking:

Scholarships and Awards	Purchasing	Recruiting
Travel and Expense	AR and Billing	Payroll
Budget and Finance	HR Position Posting	Post-Award

The following slides break down the metrics related to the individual SSC processes that could be used to track performance, identify opportunities for process improvement, and manage operations.

# Metric Types & Analysis

Data collection will be robust enough to support high-level analysis and enable drill-downs to support assessments across various categories.

Metric Type	Analysis Outcomes	Example
Efficiency	<ul style="list-style-type: none"><li>• Bottleneck identification</li><li>• Cost of service</li></ul>	Any delays in the timeliness of the SSC to deliver the necessary reports and services to assigned departments could indicate delays in receiving necessary data or process inefficiencies
Effectiveness	<ul style="list-style-type: none"><li>• Quality of work</li><li>• Utilization of Resources</li><li>• Growth of Assets</li></ul>	High error rates among transactions and low utilization of resources may indicate a training need for specific activities / process steps or increased reporting and knowledge transfer

## Customer Satisfaction Surveys

In addition to process operations metrics, a customer satisfaction survey will be administered annually to identify areas where the SSCs are not meeting service needs, and highlight areas of success. Identified gaps should be further assessed to determine the root of the problem.

Metrics collected on process operations will be analyzed with the data collected through the customer satisfaction surveys to provide a clearer picture of overall performance.

# Tracking Cost Savings

Metrics focus on tracking cost savings as well as future cost avoidance.

Metric	Measurement start/end points	Goal / Expectations
<p><b><u>Summary</u></b> Percentage of budget spent on HR, Finance and Research Admin Support</p>	SSC Expense / Operating Expenses of Areas Served	Expenses should decrease over time
<p><b><u>Summary</u></b> Percentage of Administrative FTE to total FTE</p>	SSC FTE / FTE of Areas Served	FTE ratio should decrease over time
<p><b><u>Financial</u></b> Cost per disbursement</p>	SSC Finance real salary / number of disbursements	Cost per transaction should decrease over time
<p><b><u>HR</u></b> Cost per HR staff (headcount)</p>	SSC HR real salary / headcount served	Cost per number of employees served should decrease over time
<p><b><u>Research Admin</u></b> Cost per dollar of sponsored research</p>	SSC RA salary / sponsored project expenditures	Admin cost per dollar of sponsored award expenditures supported should decrease over time

# Tracking Performance

Metrics also measure the performance of SSCs and the departments served.

Metric	Type	Measurement start/end points	Goal / Expectations
Scholarship fund utilization	Effectiveness	Expend scholarship endowment funds to the fullest extent possible each year	A greater proportion of the available funds for scholarships should be used annually, this will plateau overtime
Endowment fund utilization	Effectiveness	Expend endowment funds to the fullest extent possible each year	A greater proportion of the available funds should be used annually, this will plateau overtime
Outstanding AR	Effectiveness	Dollar value outstanding AR and Number of customers past due	Amount is expected to remain similar to that of old departmental structure with amounts decreasing over time
Travel and expense – time to reimburse	Efficiency	Date receipts are received by SSC / Date that traveler receives reimbursement	Time is expected to vary somewhat after SSC rollout with duration decreasing over time

# Tracking Performance

Metrics also measure the performance of SSCs and the departments served.

Metric	Type	Measurement start/end points	Goal / Expectations
Seasonal spending variance	Efficiency	Monthly transactions – both count and amount	Processing volume will be tracked to determine the timing and nature of departmental spend
Cost transfers (RFAs)	Effectiveness	Cost transfers – both count and amount	Processing volume will be tracked to demonstrate overall process improvement over time
Time Entry	Effectiveness	Missed punches, unapproved time, etc.	Number is expected to decrease as SSC training and processes are formalized
Time Entry	Effectiveness	Number of overrides process by HR prior to payroll submissions	Overrides should decrease over time as communication is established between the SSC and the department
Number of active awards past award end-date	Efficiency	Number of awards that are still active and past award end date	Amount is expected to remain similar to that of old departmental structure with amounts decreasing to almost 0 over time