



Who Should Read

- Business and Finance Leaders
- Administrative Unit Leaders
- Shared Services Directors

Compendium of Shared Services Profiles

How 24 Shared Services Centers Deploy Staff
and Technology to Scale Administrative Support

3 Ways to Use This Resource

- Learn how other institutions have designed their shared services organizations
- Understand the major staffing and funding models for shared services
- Compare your institution's shared services plans to the models at peer schools

Business Affairs Forum

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How to Use This Resource

Understanding the Many Approaches to Shared Services

Shared services is a topic of perennial interest among institutions looking to improve efficiency, boost service quality, reduce compliance risks, and respond to increasingly complex administrative needs. Not surprisingly, institutions planning to implement shared services—or to revise an existing model—want to know how other colleges and universities have structured their organizations. This resource is designed to shed light on this common question.

Notably, no two campuses' approaches to shared services are the same. In other words, there is not a single "right" model to adopt. Rather, leaders at campuses with successful shared services organizations have invested time and effort to craft service offerings and reporting structures that reflect the unique needs of faculty, staff, and student customers.

This resource helps leaders:

- Explore shared services organizations at institutions with similar demographic or academic profiles
- Compare service offerings across commonly centralized administrative functions
- Review successful implementation methods and proven efficiency metrics to make the case for shared services to campus stakeholders

Facilitating Comparisons Between Shared Services Models

This publication is designed to help institutions compare different shared services organization models, providing standardized information from a range of institutions. The first section of this publication is a list of trends in shared services organizational design, gleaned from analyzing dozens of examples across higher education. The second section is a model comparison matrix, providing a "side-by-side" overview of 24 shared services organizations' offerings, broken down by functional area (e.g., human resources, finance). The third section is a compilation of detailed profiles of 24 shared services organizations at 19 institutions.

Overview of This Compendium

Section	Description	Purpose
1 Key Trends from Shared Services Profiles	Executive-level takeaways, trends, and insights based on EAB's analysis of the shared services organizations profiled in this compendium	Gain a macro-level understanding of trends in the creation of shared services organizations to inform implementation decisions
2 Shared Services Model Comparison Matrix	High-level summary of the functional areas supported by each of the profiled shared services organizations	Easily compare functional areas centralized through shared services organizations and identify institutions with demographic profiles or service offerings of interest
3 Detailed Profiles of Shared Services Organizations	Detailed descriptions of the most important design elements for 24 unique shared services organizations, presented in a standardized format for cross-institutional comparison	Review services offered, reporting structure, staffing allocation, technology investments, and other details for each profiled shared services organization

Source: EAB research and analysis.



1 | **Key Trends from Shared Services Profiles**

2 | Shared Services Model Comparison Matrix

3 | Detailed Profiles of Shared Services Organizations

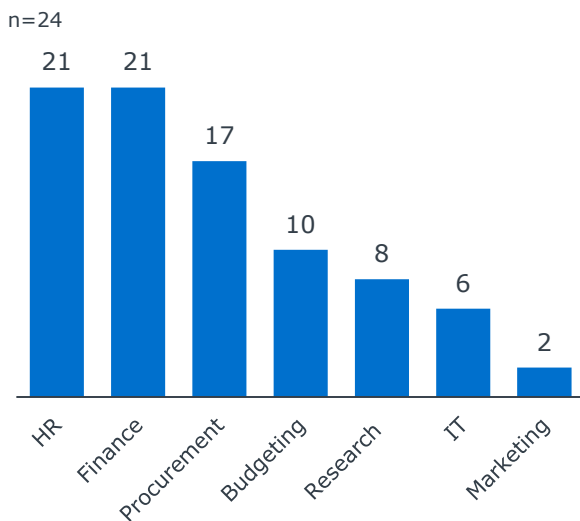
Key Trends from Shared Services Profiles

Functional Areas

Nearly every shared services center profiled in this compendium offers administrative support for HR, finance, and procurement tasks. Other functional areas include strategic budgeting, research administration, IT, and marketing and communications.

These administrative functional areas supported by shared services all involve a high volume of transactional tasks and therefore benefit from economies of scale and expertise.

Functional Areas Supported Across All Profiled Shared Services Centers



Most Common Functional Areas Supported by Profiled Shared Services Centers

88%

provide **human resources** services

88%

provide **finance** services

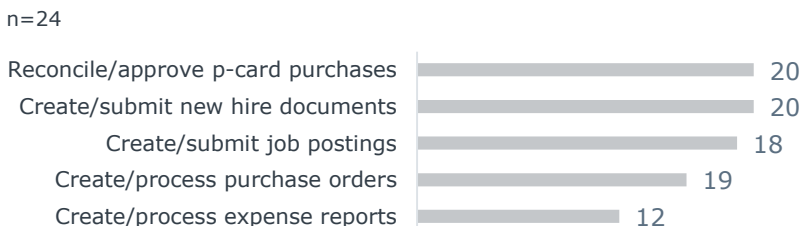
71%

provide **procurement and purchasing** services

Commonly Offered Services

Beyond a handful of common transactional tasks such as those listed below, the profiled shared services centers offer unique portfolios of support designed in response to customer needs and local opportunities. Although varied, administrative services delivered via shared services generally fall into two camps: they are either very complex, benefiting from economies of expertise, or are very simple, benefiting from economies of scale. The consolidation of complex tasks reduces the chance of error and increases compliance, while simple tasks see the greatest efficiency gains from consolidation.

Top Five Most Commonly Offered Services



175+

discrete shared services activities cataloged by EAB

Key Trends (cont.)

Organizational Models

The organizations profiled in this compendium span the three models of shared services centers:

- 1 Single, centrally managed center**

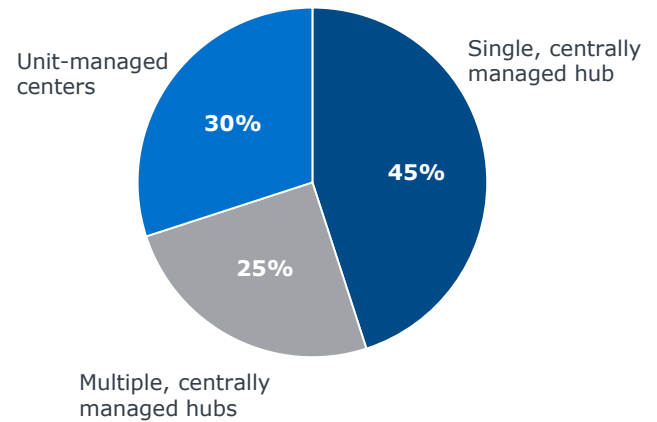
This model offers the greatest opportunity for efficiency by standardizing administrative processes across the university and consolidating staff into a single center that reports to the central administration. A centrally managed center can more easily track its performance, which helps to inform service-level agreements with customers and activity-based charge-back mechanisms.
- 2 Multiple, centrally managed hubs**

This model is an attempt to break the compromise between centralization and decentralization. Staff are consolidated into administrative clusters serving closely aligned colleges or administrative units, achieving modest scale and expertise economies while preserving proximity to customers. This model is especially attractive to large, decentralized institutions, where one central entity may struggle to evaluate the needs of many autonomous departments, centers, and units.
- 3 Unit-managed centers**

In this model, individual colleges or units create their own, locally managed shared services centers. This approach ensures maximum customization to the needs of the unit but provides far fewer economies of scale.

Shared Services Organizational Models by Participating Institutions

n = 19



Trends Among Unit-Managed Centers

Unit-managed shared services centers tend to serve two types of units:

- **Units with many faculty and staff customers and significant administrative burdens**, such as research-intensive medical divisions, that can achieve economies of scale and expertise on their own; and
- **Units with sub-scale departments that individually do not have adequate administrative support**, such as a College of Arts and Sciences, that band together for the purpose of enhanced services.

Reporting Lines

Most shared services centers profiled in this compendium report to a senior central administrator, frequently the chief business officer (CBO). The exceptions to this are unit-managed centers, which often report to the senior-most leader of the unit that they serve (e.g., a dean).

The leaders of some centers have additional dotted-line reporting relationships. For example, they may primarily report to the head of the unit served (in a unit-managed or multiple-hubs model) but have a dotted reporting line to a senior central administrator. Rarely, large centralized centers may report to the provost or president.



75%

of center directors report to a senior central administrator

Source: EAB research and analysis.

Key Trends (cont.)

Staffing

Staffing for shared services is calibrated to the size of the customer base and the number and variety of services provided. A center with a large customer base but a very limited menu of service offerings can achieve great economies of scale if processes have been optimized and therefore may not need to be heavily staffed. Conversely, a center that offers many complex processes and has not capitalized on economies of expertise may need more employees regardless of the size of its customer base.

The majority of centers in this compendium colocate their staff in a single office or small network of offices on campus, as noted in 83% of profiles. Colocation offers staff development opportunities via a professional network of peers and was repeatedly credited by center leaders with boosting staff engagement. For institutions with the distributed hub model, co-locating staff near their customer base helps shared services feel more personalized and responsive.

Size of Customer Base Does Not Always Correspond with Number of Center Staff

The University of Memphis Shared Services Center



20,000+

total customer base



75%

campus-wide utilization of certain services



4

discrete service offerings in HR and Finance



2

dedicated shared services FTEs

Tufts University Support Services



1,000+

total customer base



40%

campus-wide utilization of certain services



25+

discrete service offerings across multiple areas



43

dedicated shared services FTEs

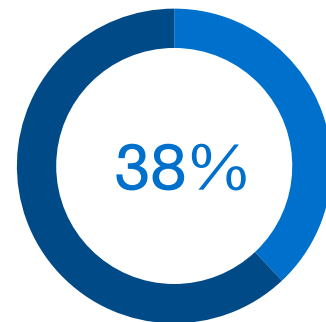
Key Trends (cont.)

Customer Bases

Profiled institutions vary in terms of whether shared services utilization is mandatory or voluntary. At some profiled institutions, the entire campus is required to interface with the shared services center for specific administrative tasks. Even in these situations, however, the institution may stagger the introduction of shared services, bringing on administrative units first before expanding into the academy. Other campuses offer shared services as an optional resource to units. There, shared services leaders work to recruit units by demonstrating the increased efficiency, service quality, and savings opportunities provided by the center. Units struggling with staff turnover, budgetary challenges, and increased administrative burdens are often willing to utilize shared services.

Profiled institutions report that service-level agreements (SLAs) and “customer councils” that seek the input of client units in managing shared services help to win over skeptical customers by demonstrating a commitment to high levels of service. SLAs formalize quality and efficiency expectations about service delivery and have been adopted by a little over one-third of profiled shared services centers.

Frequency of Service-Level Agreements in Profiled Shared Services Centers



Implementation Support

Institutions that tapped external consultant support for shared services implementations launched centers with nearly five times the number of FTEs compared to those that did not. Consultant involvement also corresponded with a longer implementation timeline, likely a product of the size and scope of these shared services initiatives. On average, the shared services implementations supported by consultants spanned many functional areas across a large customer base. In most cases, the consultants not only helped to select candidates for consolidation but also redesigned business processes and rewrote job descriptions for staff in both the shared services center and client units.

Consultant Involvement Correlates with Larger Centers and Longer Implementation Times

5x

Average number of FTEs in consultant-supported shared services centers compared to those without external implementation support

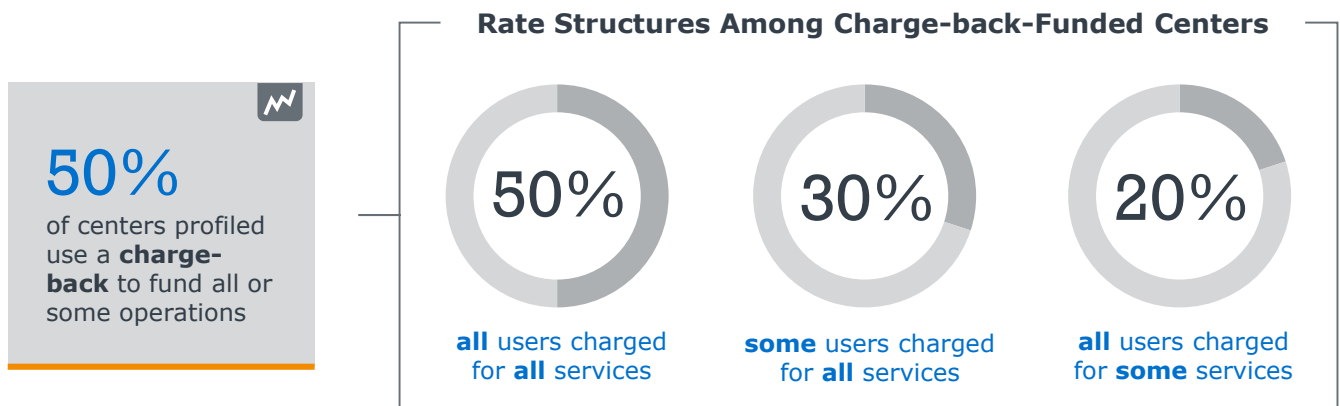
2x

Average time spent on implementation for consultant-supported shared services centers compared to those without external implementation support

Key Trends (cont.)

Funding Methods

Only half of the shared services centers profiled in this compendium charge customer units for their services. Those that do not levy charge-backs frequently moved staff budget lines from client units to the shared services center upon its creation. Otherwise, charge-back methods vary based on center structure and service offerings. Some centers charge all customers fixed rates for all or some services. For others, only units that did not contribute to the original funding of the shared services center are charged. These units are usually either opt-in customers that are not part of a center’s core constituency or revenue centers that do not receive central funding.



Sample Rate-Based Charge-back Structures



per FTE hours used



per devices serviced



per transaction completed



1 | Key Trends from Shared Services Profiles

2 | **Shared Services Model
Comparison Matrix**

3 | Detailed Profiles of Shared Services Organizations

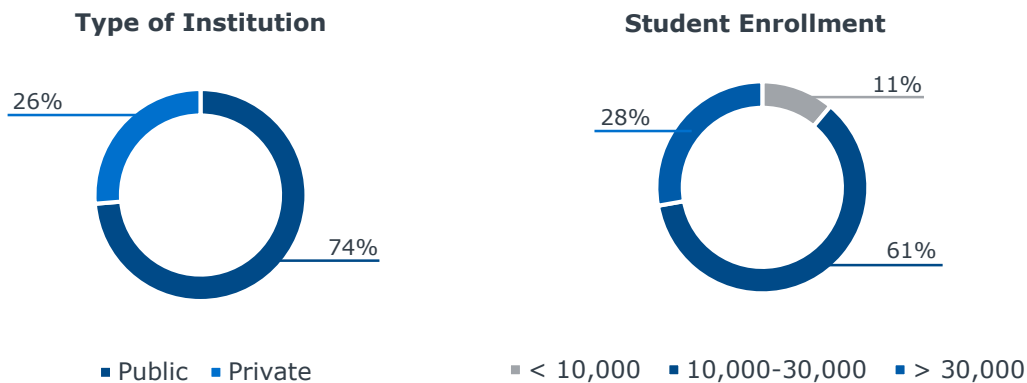
Research Methodology

Source of Data

The profiles and analysis in this compendium began with interviews with over 100 finance and administrative leaders at institutions across the United States and Canada, which formed the basis for a questionnaire distributed by EAB. Questionnaires were first sent to higher education institutions known to have shared services centers based on previous research, with additional subjects sourced from secondary research. The profiles in this publication draw primarily from self-reported data submitted by leaders of shared services centers who responded to the questionnaire. Most questionnaires were completed by either shared services center directors or university executives overseeing the centers.

Participant Cohort

Twenty-four centers from 19 universities in the United States are profiled in this compendium. More information about the response cohort is below.



Questionnaire Content and Format

Respondents were asked to describe the service areas consolidated into their shared services center from a list of eight possible functional areas—finance, strategic budgeting, procurement and purchasing, information technology, research administration, marketing and communications, human resources, and other—and then provide open-ended responses elaborating on the core services and activities performed in each.

For organizational model, respondents could select from one of three choices: single, centrally managed hub; multiple, centrally managed hubs; or single, unit-managed center. Respondents also provided information about the history and implementation process of their center, staffing levels, physical location of the center, reporting structure, charge-back methods, supporting technology, and metrics or feedback demonstrating the center's strengths and successes.

Although self-reporting largely guided the content of the profiles in this book, differences in terminology or organizational structure have been adjusted where necessary to allow for comparison across profiles. Additional detail has also been incorporated from institutional websites.

Present-Day Snapshot

No shared services model should remain static, as changes in budgets, technologies, and service expectations will present opportunities to expand and contract these organizations. For the purposes of this compendium, participants were asked to provide a snapshot of their shared services structure and services in the summer of 2019, regardless of any forthcoming plans to change. All hyperlinks are also valid as of summer 2019.

Shared Services Model Comparison Matrix

Functional Areas Supported by Shared Services

University and Shared Services Organization Name	Finance	Strategic Budgeting	Procurement/Purchasing	Information Technology	Research Administration	Marketing/Communications	Human Resources	Other
Brown University — Academic Finance and Admin.	✓	✓	✓		✓		✓	
Georgetown University — Central Business Office	✓	✓	✓				✓	
Michigan Technological University — Shared Services							✓	✓
Southern Methodist University — Shared Services	✓			✓				✓
Tufts University — Tufts Support Services	✓		✓				✓	
University of California, Berkeley — Regional Services			✓					✓
University of California, Riverside — R'Shared Services	✓						✓	
University of Denver — Shared Services	✓		✓				✓	✓
University of Florida — CFO Shared Services	✓		✓				✓	
University of Florida — College of Medicine Shared Services	✓	✓	✓		✓		✓	
University of Florida — IFAS Shared Services	✓	✓	✓		✓		✓	
University of Illinois — Engineering IT Shared Services				✓				
University of Illinois — Facilities Shared Administrative Services	✓	✓	✓	✓	✓	✓	✓	✓
University of Kansas — Shared Services Centers	✓				✓		✓	
University of Louisville — Operations Support Services	✓	✓	✓				✓	✓
U. of Louisville — School of Engineering Business Center	✓		✓		✓		✓	
U. of Maryland, Baltimore County — Shared Services	✓	✓	✓	✓	✓		✓	
University of Memphis — Shared Services Center	✓						✓	

Source: EAB research and analysis.

Shared Services Model Comparison Matrix (cont.)

Functional Areas Supported by Shared Services

University and Shared Services Organization Name	Finance	Strategic Budgeting	Procurement/Purchasing	Information Technology	Research Administration	Marketing/Communications	Human Resources	Other
University of Michigan — Shared Services Center	✓		✓				✓	
UNC at Chapel Hill — Service Center of Excellence	✓	✓	✓	✓		✓	✓	✓
University of Texas at Dallas — Central Business Office	✓	✓	✓		✓		✓	✓
U. of Washington — CAS Shared Services	✓		✓				✓	
U. of Washington — Health Sciences Administrative Center	✓		✓	✓			✓	
Utah State University — Shared Services	✓	✓					✓	

Source: EAB research and analysis.



1 | Key Takeaways from Shared Services Profiles

2 | Comparison Matrix of Shared Services Models

**3 | Detailed Profiles of
Shared Services Organizations**

Brown University

Academic Finance and Administration

Type of Institution: Private, Doctoral University: Very High Research Activity

Location: Providence, RI

Enrollment: 6,988 undergraduate; 3,107 graduate (2018)

Employees: 1,258 full-time faculty; 171 part-time faculty; 4,612 non-faculty staff (2018)

Operating Expenditures: \$1.07B (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2015 • Current customer base: Approximately 50% of all academic and administrative units • Current FTEs in the shared services organization: 19 • Physical location of shared services staff: Colocated in a single office on campus; analysts also provide on-demand services at customer locations across campus. • Reporting structure: The director of Brown's shared services center reports to the CFO, who in turn reports jointly to the provost and the executive vice president of finance and administration. 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting	X	Research Administration		
X	Procurement/Purchasing		Marketing/Communications		

Brown University (cont.)

Academic Finance and Administration

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">• Expense reports
Strategic Budgeting	<ul style="list-style-type: none">• Financial analysis and planning for units across campus
Procurement and Purchasing	<ul style="list-style-type: none">• Supplier invoices; purchase orders; customer invoices (billing); internal billing
Human Resources	<ul style="list-style-type: none">• Student workers and grant recipients: student payroll processing; graduate student worker payroll processing; student fellowship payments• Hiring: hiring transactions in HR systems; merit coordination• Other: job change transactions in the system
Research Administration	<ul style="list-style-type: none">• Pre- and post-award services for select units on campus

▶ Staff Distribution

- Finance: 3 FTEs
- Strategic Budgeting: 7 FTEs
- Procurement and Purchasing: 7 FTEs
- Human Resources: 3 FTEs
- Research Administration: 1 FTE

▶ Funding Model

- If a participating unit is endowment- or revenue-based, the service center levies a charge-back. If a unit receives general university funds, the budget allocation for the services is reassigned to the shared services center.

▶ Efficiency and Service Quality Indicators


- The center is exploring the use of Zendesk, a customer support platform and ticketing system, to help track service metrics for transactions.
- Center administrators estimate they have saved salary lines equivalent to about 12 FTEs since the shared services initiative launched in 2009, based on reducing, repurposing, or not backfilling positions.

▶ Additional Information

- The first shared services initiative at Brown began in 2009, when two small shared services groups were created: an academic service center and an administrative service center. Both centers carried out mostly the same activities but served different client bases. Eventually, the two offices merged and in 2015 were officially renamed Academic Finance and Administration.

Georgetown University

Central Business Office and Shared Service Center

<p>Type of Institution: Private, Doctoral University: Very High Research Activity</p> <p>Location: Washington, DC</p> <p>Enrollment: 7,463 undergraduate; 11,542 graduate (2018)</p> <p>Employees: 1,547 full-time faculty; 1,202 part-time faculty; 3,595 non-faculty staff (2018)</p> <p>Operating Expenditures: \$1.27B (2018)</p>	 <p>Georgetown University</p>
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► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2013 • Current customer base: 24 of the 30 administrative units on campus use the center for all support services. The remaining units have their own business offices, but the Central Business Office still reviews all staffing and compensation requests and large-dollar procurement requests. • Current FTEs in the shared services organization: 9 total, distributed as follows: <ul style="list-style-type: none"> ○ 5 business administrators ○ 1 HR specialist ○ 1 director ○ 1 finance officer ○ 1 financial analyst • Physical location of shared services staff: Colocated in a single office on campus • Reporting structure: The Central Business Office’s director and finance officer both report to the CFO. 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting		Research Administration		
X	Procurement/Purchasing		Marketing/Communications		

Georgetown University (cont.)

Central Business Office and Shared Services Center

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Budget-to-actuals reviews: monitor expenditures, revenue, and contributions for client departments; determine trends and notify leadership of any areas in need of attention; ensure all expenditures conform to university policy • Accruals and amortizations: ensure that expenses are recognized when they are incurred in accordance with GAAP • Verification of funding sources: verify for all transactions; review staffing and procurement requests to ensure that business units have sufficient funding allocated to satisfy the request • Financial guidance: provide guidance to business units on accounting, financial policy, performance, etc. • Chart of accounts: maintain and update the chart of accounts; field and evaluate requests from campus personnel • Security: review and process user requests for access to financial systems and data • General: serve as subject matter experts for financial policy, processes, and the financial system; provide guidance to business units as needed • Ad hoc reporting: research historical financial activity and provide analysis to departmental or campus leadership
Strategic Budgeting	<ul style="list-style-type: none"> • Financial plan development: in coordination with university financial leadership, develop a five-year projection of revenue and expenses, reflecting key priorities over the interval • Departmental budget development: in coordination with department heads, develop operating and capital budgets that are in line with the overall financial plan of the university • Budgetary projections: on a monthly basis, develop year-end projections based on the financial activity for the fiscal year to date; report on this to the CFO and university controller; develop action plans as needed
Procurement and Purchasing	<ul style="list-style-type: none"> • Creation of requisitions/purchase orders: upon receipt of a procurement request from business units, create requisition and monitor it as it routes for financial approval; ensure that vendors provide W-9 information and register in the university's supplier database; following financial approval, generate purchase orders, create receipts for goods and services as appropriate; ensure prompt payment by Accounts Payable for all expenses • Contract generation: for high-dollar services, ensure that a competitive bidding process has occurred or provide reasons for an exception to this requirement; incorporate statements of work into the university's standard terms; ensure that other required documentation is completed by the vendor • Contract approval tracking: ensure that the relevant parties review and approve contracts in a timely manner; serve as a conduit of information between vendors, departments, the Contracts team, and the tax office • Expense reports and p-card activity review: review employee reimbursement requests and procurement spend using a university-provided p-card; ensure that a legitimate business purpose exists for each request and that request is in accordance with university policy; report violations to leadership for appropriate action

Georgetown University (cont.)

Central Business Office and Shared Services Center

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Human Resources	<ul style="list-style-type: none">• Budgetary approval of staffing and compensation requests: compare payroll actuals, departmental rosters, and budgets upon receiving requests for new positions, compensation adjustments, promotions, and other actions that have an impact on the salary ledger account; identify those that can be accommodated within the department's budget and flag those that cannot• Position description creation: work with departments to develop job descriptions conforming to the requirements of central Human Resources
Human Resources	<ul style="list-style-type: none">• Create/edit positions: upon receipt of financial approval of a staffing/compensation request, initiate relevant transaction within human capital management (HCM) system (includes position creation, position editing, creation of job requisitions compensation changes, one-time payments, transfers, promotions, demotions, and terminations)• General: serve as subject matter experts for HR policy, processes, and the HCM system• Onboarding: verify I-9 documentation and ensure completion of I-9 forms for staff and student employees

▶ Supporting Technology

- Finance: Workday Financials
- Procurement and Purchasing: Workday Financials
- Human Resources: Workday HCM

▶ Funding Model

- High-volume services are funded using internal charge-backs that do not require approvals; low-volume services are funded using a standard accounting journal, which is sent for approval to the cost center managers on either side of the transaction.

▶ Efficiency and Service Quality Indicators

- Although only six individual contributor FTEs staff the center, they process about 18,000 transactions a year, a significantly higher ratio of employees-to-transactions than any other independent business unit on campus. The team also consistently receives high scores in customer satisfaction and competence in annual service-quality surveys and unsolicited feedback.

Michigan Technological University

Shared Services

<p>Type of Institution: Public, Doctoral University: High Research Activity</p> <p>Location: Houghton, MI</p> <p>Enrollment: 5,890 undergraduate; 1,402 graduate (2018)</p> <p>Employees: 534 full-time faculty; 92 part-time faculty (2018)</p> <p>Operating Expenditures: \$202.5M (2019)</p>	 <p>Michigan Tech</p>
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► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2018 • Current customer base: Approximately 7% of all campus units; currently, all participants are administrative units (Dining Services, Environmental Health and Safety, Facilities Operations, etc.). • Current FTEs in the shared services organization: 8 • Physical location of shared services staff: Colocated in a single office on campus • Reporting structure: The center's general manager reports to the associate vice president for administration. • Website: https://www.mtu.edu/shared-services/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting		Research Administration	X	Administrative Support
X	Procurement/Purchasing	X	Marketing/Communications		

Michigan Technological University (cont.)

Shared Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">• Make travel arrangements and process claims• Check requests
Strategic Budgeting	<ul style="list-style-type: none">• Budget development for departments
Procurement and Purchasing	<ul style="list-style-type: none">• P-card reallocations• Assist with requests for bids and proposals• Oversee Facilities Management and vehicle purchases• Provide central receiving of shipments
Human Resources	<ul style="list-style-type: none">• Create Electronic Personnel Action Forms (EPAFs)• Collect student employee paperwork• Support search committees
Marketing and Communications	<ul style="list-style-type: none">• Manage website content in collaboration with University Marketing and Communications• Draft informational, operational, and promotional communications adhering to the university's Identity Standards• Develop strategic communication plans, tools, and resources• Act as an editor and writer for department communications pieces• Assist with the collection, analysis, and presentation of performance metrics• Assist with survey projects, including the development of research goals, creation of questions, response gathering, and data analysis
Administrative Support	<ul style="list-style-type: none">• Meeting and event planning• Document creation• PureSafety safety training assignments and tracking

Michigan Technological University (cont.)

Shared Services

▶ Staff Distribution

- Finance and Strategic Budgeting: 3 FTEs¹
- Procurement and Purchasing: 2 FTEs
- Human Resources, Marketing and Communications, and Administrative Support: 3²

▶ Efficiency and Service Quality Indicators

- Since opening in 2018, the center has fulfilled over 1,000 purchase requests.
- Center staff have helped to facilitate university-wide discussions about data-informed decision-making through analytic support.
- Shared Services also identified a gap in the student hiring process in Dining Services and collaborated with leaders in that unit to implement a new process, including a revamp of payroll paperwork processing.
- In a recent customer satisfaction survey, 74 out of 76 respondents indicated they were very satisfied with services provided by the Shared Services center. In particular, customers singled out the short response time, quick turnaround, and quality of customer interactions as highly valued features.

▶ Additional Information


- A single email account is used to intake requests and generate tickets in the Request Tracker ticketing system. The center's administrative team reviews each ticket as it comes in and assigns it to the appropriate staff member to resolve.
- In designing the model for the center, the general manager met with each unit leader to discuss what services the center could provide, leading to a list of service offerings reflecting the areas of greatest need for the customer base.

1) Staff are cross-trained for finance and strategic budgeting tasks.

2) Staff are cross-trained for human resources, marketing/communications, and administrative support tasks.

Southern Methodist University

Shared Services

<p>Type of Institution: Private, Doctoral University: High Research Activity</p> <p>Location: Dallas, TX</p> <p>Enrollment: 6,452 undergraduate; 5,337 graduate (2018)</p> <p>Employees: 806 full-time faculty; 398 part-time faculty; 1,577 non-faculty staff (2018)</p> <p>Operating Expenditures: \$561M (2018)</p>	
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► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2016 • Current customer base: All academic and administrative units • Current FTEs in the shared services organization: 275 • Physical location of shared services staff: Colocated in single office on campus and in facilities adjacent to the main campus • Reporting structure: The Finance and Facilities divisions report to the vice president for business and finance; the IT division reports to the president. • Website: https://blog.smu.edu/opex/shared-services/ 		

► Consolidated Service Areas

X	Finance	X	Information Technology		Human Resources
	Strategic Budgeting		Research Administration	X	Facilities
	Procurement/Purchasing		Marketing/Communications		

Southern Methodist University (cont.)

Shared Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">• General: accounting; financial transactions such as accounts payable; payroll; tax; post-award accounting; Concur system support; purchasing; verify funding; budgeting functions; system access management; strategic financial planning and analysis; position management
IT	<ul style="list-style-type: none">• General: desktop support; hardware and software purchases; software support and maintenance; security; technology infrastructure; IT strategic planning for both academic and administrative needs
Facilities	<ul style="list-style-type: none">• General: custodial; trades support; event support; grounds; project management; real estate; deferred and preventive maintenance

▶ Staff Distribution

- Finance: 90 FTEs
- IT: 85 FTEs
- Facilities: 100 FTEs

▶ Supporting Technology

- Finance: PeopleSoft, Concur

▶ Funding Model

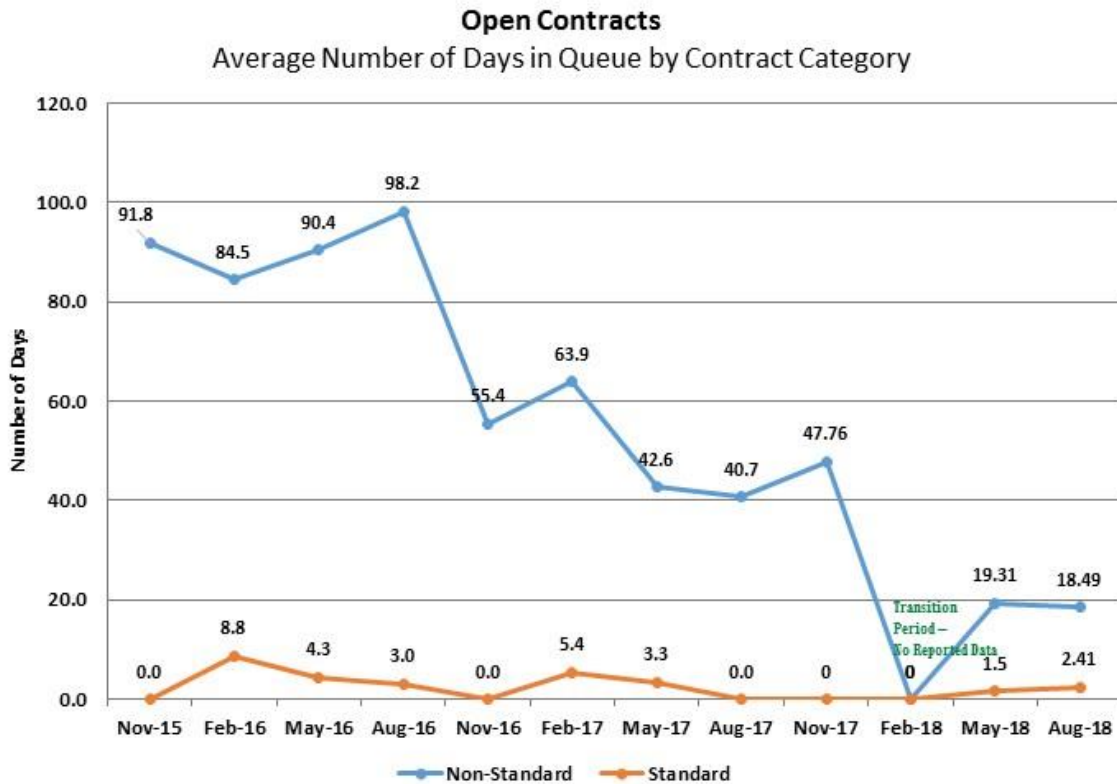
- No charge-backs are used; unit budgets corresponding to staff salaries were swept to the shared services divisions upon creation.

Southern Methodist University (cont.)

Shared Services

► Efficiency and Service Quality Indicators

- SMU’s Office of Finance and Budget maintains a robust database of service metrics and visualizations that is updated on a quarterly basis.
- Most visualizations include a description of any circumstances that could impact the data, such as a reassignment of duties from one staff group to another, as well as the goal the university hopes to achieve (e.g., a decrease in the number of manual journal entries). Many of these visualizations include helpful visual aids, such as target areas or spaces marking the transition period in which the shared services model was implemented.
- For example, the graph below shows that following the implementation of the new contract administration process in early 2018, the number of open contracts and the average number of days spent in the queue dropped dramatically.



- Open Contracts reflect the total number of open contracts in the new contract administration process.

Tufts Support Services

Type of Institution: Private, Doctoral University: Very High Research Activity

Location: Medford, MA

Enrollment: 5,541 undergraduate; 5,908 graduate (Fall 2017)

Employees: 1,345 full-time faculty; 592 part-time faculty; 3,426 non-faculty staff (2018)

Operating Expenditures: \$904M (FY 2018)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2014 • Current customer base: <ul style="list-style-type: none"> ○ 100% of academic and administrative units for accounts payable, payroll, and benefits administration services ○ Approximately 40% of units for travel services ○ Approximately 10% of units for procurement services • Current FTEs in the shared services organization: 43 • Physical location of shared services staff: In addition to a central shared services office on the main campus, there are two local offices on the satellite campuses in Boston and Grafton. • Reporting structure: The head of Tufts Support Services reports to the executive vice president/chief administrative officer. • Website: https://tuftstss.force.com/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration		
X	Procurement/Purchasing		Marketing/Communications		

Tufts University (cont.)

Tufts Support Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • General: answer basic questions on policies and procedures; provide access and guidance on how to use forms, tip sheets, and guides for finance activities • Accounts payable: process payments to vendors; create and update vendor profiles in systems; respond to questions from vendors or faculty and staff regarding payment status • Travel and expense: answer policy questions; assist faculty and staff in booking travel; assist faculty and staff in completing travel and expense reports • Accounting: answer questions on policies and procedures; conduct data entry and upload of journal entries
Procurement and Purchasing	<ul style="list-style-type: none"> • Procurement: prepare bid documents for high-volume, low-dollar purchases; work with departments to determine appropriate channel, vendor, and pricing; process purchase orders and requisitions; administer access and maintain user profiles for credit cards and online financial systems
Human Resources	<ul style="list-style-type: none"> • General: answer basic questions on policies and procedures; provide access and guidance on how to use forms, tip sheets, and guides for HR activities • Employee information: process updates to employee information such as initial hiring, promotion, transfers, working hours change, etc. • Payroll: maintain employee pay and deduction information; provide paycheck services such as direct deposit, payroll deductions, and other types of pay adjustments, W-2s, etc.; publish and maintain payday calendars for weekly and semimonthly payroll; provide documentation and guidance for users to complete and submit online time entry and time-off tracking • Compensation tax: generate federal, state, and foreign withholding; submit and report to government agencies • Benefits administration: respond to general questions regarding all employee benefits programs; process annual benefit open enrollment changes; receive and process changes to employee benefits, including qualified status changes • Onboarding: verify I-9 documentation and process I-9 forms for faculty, staff, and student employees

► Supporting Technology

- Finance: PeopleSoft Financials
- Human Resources: PeopleSoft HCM
- Procurement and Purchasing: PeopleSoft Financials
- Customer Relationship Management: Salesforce

► Efficiency and Service Quality Indicators

- The volume of work completed by the shared services center has increased significantly since going live in December 2014, with service-level agreements (SLAs) and survey data collected to support successes.

► Additional Information

- When created, the shared services organization sourced half of its staff from central units and half from external hires.

University of California, Berkeley

Berkeley Regional Services

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Berkeley, CA

Enrollment: 30,574 undergraduate; 11,317 graduate (2018)

Employees: 3,012 full-time faculty; 1,090 part-time faculty; 8,369 non-faculty staff

Operating Expenditures: \$2.8B (FY2018)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: First central unit was established in 2013; restructured to current Regional Services model in 2018. • Current customer base: The center is split into six hubs, each serving a portion of campus. The hubs are divided into four groups of related academic units (e.g., physical sciences), as well as one hub that serves administrative departments and auxiliaries and another that serves professional schools. In total, the hubs serve roughly 90% of campus. • Current FTEs in the shared services organization: 350 • Physical location of shared services staff: Colocated in multiple on- and off-campus offices • Reporting structure: The Regional Services director reports to the vice chancellor for administration. • Website: https://regionalservices.berkeley.edu/ 		

► Consolidated Service Areas

X	Finance	X	Information Technology	X	Human Resources
	Strategic Budgeting	X	Research Administration	X	Shipping and Receiving
X	Procurement/Purchasing		Marketing/Communications		

University of California, Berkeley (cont.)

Berkeley Regional Services

► Menu of Shared Services Offerings¹

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Travel and expense: travel planning and booking assistance; travel advance request processing; insurance for business-related travel; process general supply reimbursements; process reimbursements for university travel; problem resolution; policy interpretation; other services associated with travel, entertainment, exceptional approvals, and travel advances; payments to vendors and reimbursements to individuals for entertainment events, such as business meetings, conferences and retreats, and other occasions where meals and/or light refreshments are served • Event planning: food purchasing for meetings and entertainment events; alcohol permit processing; reimbursement for entertainment expenses; event insurance assistance; general guidance on entertainment policy
Procurement and Purchasing	<ul style="list-style-type: none"> • Cell phones and portable electronic device purchasing guidance; guidance on and processing of insurance polices for purchased items • Honoraria processing • Source selection and price reasonableness justification form processing • California partial sales tax exemption processing • Foreign bank authorization processing • Shipping and receiving services for purchases
Human Resources	<ul style="list-style-type: none"> • Hiring and recruitment: job description template design; request to hire and request to recruit processing; student assistant hiring oversight • Onboarding: coordinate preemployment screenings and background checks; send welcome emails and first-day packages; conduct in-person onboarding sessions to complete necessary hiring paperwork and provide counseling regarding benefits • Records management: employment verification requests; service award processing; seniority points calculation; subpoena requests; personnel file management; I-9 audits; unemployment insurance claims; union deductions; W4 updates • Visa support: prepare and coordinate (with central international department) employment-based visas for supported units, including H-1B and J-1 • Benefits and leave: benefit enrollment assistance; processing of annual open enrollment changes; retirement plan administration; reciprocity verification of previous employment • Performance management: employee development assistance, including individual plan development; performance management administration • Payroll and compensation: general payroll processing and submission; payroll expense transfer requests; time sheet completion and submission support; sponsored funding processing; leave reporting; late or adjusted payment request processing; one-time payment request processing; employee earnings distribution change processing; employee action change form processing; employee separation management; new hire management • Academic appointments: process paperwork related to academic appointments or promotions; academic removal expenses; exceptional principal investigator (PI) requests; faculty research appointment support; non-faculty senate academic recruitment process support; postdoc management, including offers, performance management, annual evaluations, and time sheet management; project-related recruitment and appointments; research recall appointments; summer salary management; visiting researcher and scholar appointments; visiting researcher and scholar payments; visiting student researcher management; graduate student researcher management • Campus programs: Employee Initiated Reduction in Time (ERIT) program management; Faculty Salary Research Exchange Program (FSREP) management; Glacier support (tax process for foreign employees)

1) Although the exact offerings of each regional center vary slightly, most provide the services listed here.

University of California, Berkeley (cont.)

Berkeley Regional Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Research Administration	<ul style="list-style-type: none"> • Post-award and grants management: review and understand award document terms and conditions and compliance issues, and alert PI to any unusual requirements; review the initial award budget as set up by EFA and revise as necessary; evaluate allowability of costs to ensure compliance with regulations related to sponsored projects; maintain understanding, and keep PI informed, of regulatory changes or issues; prepare accurate and timely financial analysis and reports on each award (includes forecasting and managing liens); monitor cost-sharing during the award; provide comprehensive personnel services (i.e. HCM data management, recruitment, benefits counseling, and classification review, etc.), and payroll services; assist with research-related procurement and accounting; sub-recipient monitoring and reporting; provide property and equipment inventory tracking services; support and provide information for billing, invoicing, and collections; plan and perform timely closeout process, including extensions and completion of all final reports • Nonroutine research enhancement: support for organizing seminars, workshops, travel, and conference or other research events; clerical and administrative support to PIs, graduate student researchers, visitors, and the like; manuscript typing; library operations • Pre-award process: accurate and timely proposal and sub-award submission; ensure that proposals and sub-awards meet all regulatory requirements; provide nontechnical contract proposal development support; develop draft proposal and final budget, including cost sharing; advise PI¹ regarding budget justifications and adherence to program special requirements; coordinate or participate in proposal preparation groups at other institutions in collaborative proposals

▶ Supporting Technology

- Ticketing system: ServiceNow

▶ Efficiency and Service Quality Indicators

- Customers have reported greater satisfaction levels after transitioning from a single central shared services center to six regional centers in 2018.

University of California, Riverside

R'Shared Service Center (R'SSC)

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Riverside, CA

Enrollment: 20,581 undergraduate; 3,341 graduate (2018)

Employees: 611 full-time faculty; 358 part-time faculty; 5,105 non-faculty staff (2018)

Operating Expenditures: \$1B (FY 2018)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2010 • Current customer base: The R'SSC is one of four shared service centers at UCR, each of which serves a segment of campus. The R'SSC serves most of the administrative departments on campus, including the Office of Financial Planning and Analysis, the Office of the Chancellor/Provost, University Advancement, Office of Academic Personnel, Office of Undergraduate Education, Enrollment Services, Information Technology Solutions (ITS), and Planning, Budget, and Administration units. It also serves the School of Medicine, Department of Athletics, and Department of International Affairs. While payroll, time reporting, onboarding and offboarding services are mandatory for participating units, not all units are required to use R'SSC for leave administration activities. Due to the composition of its customer base, R'SSC processes roughly 40% of UCR's total financial transactions and 100% of its onboarding and LiveScan¹ services, as no other center is authorized to conduct LiveScans. • Current FTEs in the shared services organization: 10 permanent FTEs, plus 10 temporary FTEs to handle summer volume and other temporary spikes • Physical location of shared services staff: Onboarding is handled on the main campus; the rest of the staff are located off-campus in a leased office. • Reporting structure: The R'SSC is headed by the associate vice chancellor of planning, budget, and administration, who in turn reports to the vice chancellor of planning, budget, and administration. Daily operations, workforce planning, and budgeting are managed by the director of the center, who reports to the associate vice chancellor. • Website: https://ucpath.ucr.edu/rshared 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration		
	Procurement/Purchasing		Marketing/Communications		

1) LiveScan is a background check required for state-issued licenses, employment, or volunteer work, which includes the collection of fingerprints.

Source: University of California Riverside, Riverside, CA.

University of California, Riverside (cont.)

R'Shared Service Center (R'SSC)

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">Payroll: update employee payroll and personnel records; enter merit/wage increases; change account distributions; process salary cost transfers; audit and process time reports (only those time reports that do not meet certain business rules—most time reports automatically route into the UCPath system)
Human Resources	<ul style="list-style-type: none">Leave administration: evaluate leave eligibility and prepare leave paperwork; monitor leave utilization; audit and report on leave processEmployee onboarding (including faculty): schedule Day 1 onboarding meetings; process new hire paperwork; complete background checks (R'SCC staff are certified to roll fingerprints for Department of Justice LiveScans)Employee offboarding: collect final time reports; prepare final pay paperwork; coordinate final payments

▶ Staff Distribution

- Finance: 17 FTEs
- Human Resources: 3 FTEs

▶ Supporting Technology

- Finance: PeopleSoft
- Human Resources: PeopleSoft
- Scheduling: Simply Book Me (for onboarding and LiveScans)
- Ticketing System: ServiceNow

▶ Funding Model

- The R'SSC utilizes a time-driven, activity-based formula to distribute costs to the individual units served based upon the volume of work attributed to them.

▶ Efficiency and Service Quality Indicators

- The R'SSC implemented Lean processes, along with time-driven activity-based costing methods, to increase efficiencies and lower costs. For three years, the cost of service per minute remained flat, even though the center experienced fixed cost increases and took on additional work.

▶ Additional Information

- The center uses a service-level agreement to govern service expectations for customers and staff.
- Time reporting and payroll processing were the first two functional areas to go live.

University of Denver

Shared Services Center

Type of Institution: Private, Doctoral University: High Research Activity

Location: Denver, CO

Enrollment: 5,765 undergraduate; 5,669 graduate (2018)

Employees: 749 full-time faculty; 562 part-time faculty; 1,800 non-faculty staff (2018)

Operating Expenditures: \$477M (FY 2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2015 • Current customer base: All academic and administrative units use the center at various levels (100% for payments, payroll, and HR; less than 25% for procurement; travel recently implemented). • Current FTEs in the shared services organization: 34 • Physical location of shared services staff: Colocated in a single location on campus • Reporting structure: The director of the shared services center reports to the senior vice chancellor for finance, with a dotted reporting line to the vice chancellor of HR. • Website: https://www.du.edu/sharedservices/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration	X	SSC ¹ Operations
X	Procurement/Purchasing		Marketing/Communications		

1) Shared Services Center.

Source: University of Denver, Denver, CO.

University of Denver (cont.)

Shared Services Center

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Payment services (accounts payable): create, update, and manage vendor records; process all payments to vendors via purchase orders and direct check requests; manage the administration of university's p-card distribution programs; process all expense reports through Concur; serve as Concur system administrator; answer policy and procedure questions • Payroll: maintain employee pay and deduction information; provide paycheck services, such as direct deposit, payroll deductions, and other types of pay adjustments, W-2s, etc.; publish and maintain payday calendars for bi-weekly and monthly payroll; provide documentation and guidance for users to complete and submit time and attendance records in Kronos; manage Kronos system administration; generate federal, state, and foreign tax withholding; submit and report to government agencies; manage grant payroll; redistribution process and effort certification
Procurement and Purchasing	<ul style="list-style-type: none"> • Process requisitions and purchase orders; review contracts for business terms; manage the performance of certain university-wide suppliers; prepare RFX documents for certain sourcing events when solicited by departments
Human Resources	<ul style="list-style-type: none"> • Recruiting: gather information to create recruiting plan; review ad copy; submit job posting; assist with recruitment when solicited; process official offers in system; answer process questions • Onboarding: manage preemployment background screening process; verify I-9 documentation; process I-9 forms for faculty, staff, and student employees • Benefits administration: respond to all questions regarding all employee benefits programs; process annual benefit open enrollment changes; receive and process changes to employee benefits, including qualified status changes; manage leave program for university • Employment actions: process all employment actions in system, including new hires, job changes, and separations
Operations	<ul style="list-style-type: none"> • Team of business officers within the center, which works closely with 14 smaller campus divisions to assist with their strategic budgeting and finance activities at a level beyond what is offered to other center users

University of Denver (cont.)

Shared Services Center

▶ **Staff Distribution**

- Finance: 11 FTEs
- Procurement and Purchasing: 6 FTEs
- Human Resources: 8 FTEs
- Operations: 8 FTEs

▶ **Supporting Technology**

- Finance: Banner, Concur, Kronos
- Human Resources: ATR
- Ticketing system: FreshDesk
- Since its debut in 2015, the Shared Services Center has led the implementation of two major university-wide enterprise software systems, one for time/attendance tracking and another for expense processing. A new e-procurement will be implemented in 2020.

▶ **Efficiency and Service Quality Indicators**

- In the three years since the center was implemented, customer feedback has indicated increased satisfaction and improved customer experiences. Customers and staff alike have also expressed greater satisfaction with streamlined and centralized core university processes under the shared services center, which has standardized the customer service process and reduced the number of steps and staff members involved in many tasks.

▶ **Additional Information**

- The three-person Shared Services Center Operations team provides direct support to a cluster of units on campus that are too small to have their own dedicated budget staff. The team is staffed by business officers who are experts in the areas they assist. Units supported by the Operations team receive support on budgeting and related issues (e.g., finance and HR) that go beyond the center's standard offerings.

University of Florida

CFO Shared Services Center

<p>Type of Institution: Public, Doctoral University: Very High Research Activity</p> <p>Location: Gainesville, FL</p> <p>Enrollment: 35,247 undergraduate; 20,422 graduate (2018)</p> <p>Employees: 4,676 full-time faculty; 903 part-time faculty; 54,000+ non-faculty staff (2018)</p> <p>Operating Expenditures: \$30.6B (2018)</p>	
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► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2010 • Current customer base: Various academic and administrative units • Current FTEs in the shared services organization: 4 • Physical location of shared services staff: Colocated in a single on-campus office • Reporting structure: <ul style="list-style-type: none"> ○ The CFO Shared Services Center is managed by the assistant vice president/chief procurement officer. ○ 8+ shared services centers of various sizes provide services to their respective constituents across the University of Florida. While each center is managed separately, their respective leaders assemble periodically to share lessons learned and best practices. • Website: https://cfo.ufl.edu/administrative-units/shared-services-center/ 		

► Consolidated Service Areas

X	Finance	X	Human Resources
	Strategic Budgeting		
X	Procurement/Purchasing		

University of Florida (cont.)

CFO Shared Services Center

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	• Approve invoices; send statements to customers; reconcile ledgers; file taxes
Procurement and Purchasing	• Process and approve p-card transactions; upload documentation backup; enter appropriate accounting information; enter requisitions or shop electronic catalogs to purchase; route contracts for review by Procurement
Human Resources	• Post positions; send candidate pool to hiring manager; enter hiring information for new staff; onboard new staff paperwork; process terminations, raises, special pay increases, payroll distributions, and cash-outs for sick leave and vacation after employee terminates; process position reclassification

▶ Staff Distribution

- All functions: 4 FTEs¹

▶ Supporting Technology

- All functions: PeopleSoft, Jaggaer eProcurement, Jaggaer Accounts Payable, OnBase

▶ Funding Model

- Core university administrative offices receive services without charge.
- Participating academic units are billed based on staff time taken on by the CFO Shared Services Center.

▶ Efficiency and Service Quality Indicators

- As the CFO Shared Services Center has grown, additional units on campus have contacted the center to use the offered services, propelling further growth and demonstrating the campus demand for the efficiency and convenience of the center's offerings.

1) Center staff are cross-trained in various functional areas.

University of Florida

Institute of Food and Agricultural Sciences (IFAS) Shared Services

<p>Type of Institution: Public, Doctoral University: Very High Research Activity</p> <p>Location: Gainesville, FL</p> <p>Enrollment: 35,247 undergraduate; 20,422 graduate (2018)</p> <p>Employees: 4,676 full-time faculty; 903 part-time faculty; 54,000+ non-faculty staff (2018)</p> <p>Operating Expenditures: \$30.6B (2018)</p>	
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► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2013 • Current customer base: 17 academic departments within IFAS (roughly 40% of the entire division) • Current FTEs in the shared services organization: 35 • Physical location of shared services staff: Colocated in a single on-campus office • Reporting structure: <ul style="list-style-type: none"> ○ The IFAS Shared Services director reports to the senior vice president of agriculture and natural resources. ○ 8+ shared services centers of various sizes provide services to their respective constituents across the University of Florida. While each center is managed separately, their respective leaders assemble periodically to share lessons learned and best practices. • Website: https://sharedservices.ifas.ufl.edu/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting	X	Research Administration		
X	Procurement/Purchasing		Marketing/Communications		

University of Florida (cont.)

Institute of Food and Agricultural Sciences (IFAS) Shared Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Collaborate with participating departments on policies and procedures; serve as spending authority; ensure use of the correct account for purchases and monthly expenses • Advise faculty on appropriate use of fund sources and related policies • Assist faculty with forms, templates, and correct processes • Provide guidance on major purchases and travel issues
Strategic Budgeting	<ul style="list-style-type: none"> • Reconciliations • Cost transfers and year-end analysis • Account review
Procurement and Purchasing	<ul style="list-style-type: none"> • Purchase requisitions • Submit new vendor ID paperwork
Human Resources	<ul style="list-style-type: none"> • Electronic Personnel Action Form (EPAF) processing for all categories of employees including graduate assistants, postdoc and predoc fellowships, temporary employees (OPS¹), student assistants, and faculty • Recruitment: posting positions; managing applicant pools • FMLA² guidance and paperwork processing • Onboarding: verify I-9 documentation and process forms for faculty, staff, and student employees • Recruitment: collaborate with departments on staffing needs and faculty recruitment searches; answer questions and provide guidance on process • Employment status: job changes; terminations (including retirement and resignations); cash-out processing • Immigration: visa processing for students, visitors, and employees (excluding J-1 and F-1 visas); assist with foreign degree academic credential (ACE) evaluations; periodic review of employment authorizations • Payroll: new payroll distributions • General HR Guidance: provide guidance and answer questions on basic HR issues and policies; meet with participating departments to discuss new procedures or policy
Research Administration	<ul style="list-style-type: none"> • Pre-award/pre-agreement: initial review of proposal, budget assistance, and routing for approval • Research budgeting: overview, summary updates, and expense projections • Award modifications: budget realignment, no-cost extensions, cost accounting standards (CAS) exemptions • Award monitoring and compliance • Effort reporting • Payroll distributions • Grant closeout

1) Other personnel services.
2) Family and Medical Leave Act.

University of Florida (cont.)

Institute of Food and Agricultural Sciences (IFAS) Shared Services

▶ **Staff Distribution**

- Finance: 16 FTEs
- Strategic Budgeting: 1 FTE
- Procurement and Purchasing: 2 FTEs
- Human Resources: 5 FTEs
- Research Administration: 11 FTEs

▶ **Supporting Technology**

- Finance: PeopleSoft
- Research Administration: UFIRST

▶ **Efficiency and Service Quality Indicators**

- In FY2013, the first year of operations, the IFAS shared services center served seven academic departments and processed approximately 26,000 transactions. In FY2018, the center served 17 departments, including two off-campus sites, and processed over 85,000 transactions.

University of Florida

Department of Medicine Shared Services

Type of Institution: Public, Doctoral University: Very High Research Activity



Location: Gainesville, FL

Enrollment: 35,247 undergraduate; 20,422 graduate (2018)

Employees: 4,676 full-time faculty; 903 part-time faculty; 54,000+ non-faculty staff (2018)

Operating Expenditures: \$30.6B (2018)

► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2014 • Current customer base: All faculty and staff in Department of Medicine (excluding residents, fellows, and courtesy faculty), roughly 720 individuals • Current FTEs in the shared services organization: 22 • Physical location of shared services staff: Colocated in a single on-campus office • Reporting structure: <ul style="list-style-type: none"> ○ The head of the Department of Medicine Shared Services reports to the director of the Department of Medicine. ○ 8+ shared services centers of various sizes provide services to their respective constituents across the University of Florida. While each center is managed separately, their respective leaders assemble periodically to share lessons learned and best practices. 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting	X	Research Administration		
X	Procurement/Purchasing		Marketing/Communications		

University of Florida (cont.)

Department of Medicine Shared Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Create monthly financial reports for sub-division staff and chiefs • Support completion of annual institutional reports for nonclinical funds (such as the UF Foundation, Gatorade royalties, auxiliaries, etc.) • Manage central billing for clinical and non-research contracts
Strategic Budgeting	<ul style="list-style-type: none"> • Support 11 divisions with development of annual budget and strategic initiatives
Procurement and Purchasing	<ul style="list-style-type: none"> • Complete central processing of invoices, purchase orders, journal entries, and p-cards • Outline process with required information and approval from fund administrator • Process travel and expense reimbursements; however, pre-travel authorization and bookings are handled by division staff or faculty
Human Resources	<ul style="list-style-type: none"> • Serve as central record keeper for all required documents; initiate and manage institutional paperwork when division has received required approval for recruitment • Post positions to requested sites • Enter initial salary distribution and request IT access based on role • Communicate terminations and retirements to College of Medicine and central UFL HR
Research Administration	<ul style="list-style-type: none"> • Handle pre- and post-award processes for divisions who utilize central team; serve as delegate of Chair in approving submissions and accepting awards • Assist with clinical trial budgets and negotiations

▶ Staff Distribution

- Finance and Strategic Budgeting: 5 FTEs¹
- Procurement and Purchasing: 4 FTEs
- Human Resources: 5 FTEs
- Research Administration: 8 FTEs

▶ Supporting Technology

- Finance: PeopleSoft, OneStream, Hyperion
- Strategic Budgeting: PeopleSoft
- Procurement and Purchasing: PeopleSoft
- Human Resources: PeopleSoft
- Research Administration: PeopleSoft
- Internal website: Sharepoint

▶ Funding Model

- There are no charge-backs for Department of Medicine customers; instead, expenses are charged at the administrative level, then allocated out to divisions on a zero-net-cost basis based on predetermined metrics.

▶ Efficiency and Service Quality Indicators

- Since implementing the center, customers have benefited from streamlined, simplified, and standardized business processes as well as having more direct access to documents instead of requesting them through the central institutional systems. On the staff side, role duplication has been reduced, and staff can now measure productivity by tracking document touches as they move through the center.

1) Strategic budgeting tasks are completed by the finance shared services team.

Source: University of Florida, Gainesville, FL.

University of Illinois at Urbana-Champaign

Engineering IT Shared Services

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Champaign, IL

Enrollment: 33,955 undergraduate; 14,261 graduate (2018)

Employees: 2,367 full-time faculty; 822 part-time faculty; 5,193 non-faculty staff (2018)

Operating Expenditures: \$6.8B (2019)



► Organizational Model

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2010 • Current customer base: Grainger College of Engineering; the application development service is used campus-wide. • Current FTEs in the shared services organization: 78 • Physical location of shared services staff: Spread across seven buildings on campus, but generally located close to the respective user communities • Reporting structure: The director of the shared services center reports to the associate dean for IT. • Website: http://it.engineering.illinois.edu/ 		

► Consolidated Service Areas

Finance	X	Information Technology	Human Resources
Strategic Budgeting		Research Administration	Other
Procurement/Purchasing		Marketing/Communications	

University of Illinois at Urbana-Champaign (cont.)

Engineering IT Shared Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Information Technology	<ul style="list-style-type: none"> • Accounts and security: e-lock; guest accounts; information security; unit security contact; telecom unit coordinator; malware protection passwords; Identity and Access Management System; two-factor authentication; Illini-Alert system • Communication and collaboration: calendaring; collaboration tools; email; voice (Lync/Skype for Business); SharePoint Shared Service; campus mailing lists; Engineering Wiki; Google Apps; Office 365 • Engineering WorkStation lab maintenance: provide high-performance, highly reliable instructional computing resources for the students and faculty • General file and data storage services • Hardware and software: desktop replacement program; hardware purchase consultation; IT equipment decommissioning; laptop loan program; software licensing; software purchase consultation; version control; WebStore; Amazon Web Services (AWS) provisioning • Information services: create custom reports to fulfill ad hoc requests covering the full range of administrative data from external and internal sources; develop policy studies relating directly to student performance, instructional load, and other metrics; harvest and analyze information from the institutional data sources to facilitate various processes and activities, (e.g. end-of-semester processing); develop and run standard cyclical reports from various university data sources; perform business process analysis and design new processes to improve operational efficiency; manage the development and maintenance of data standards for college systems • Instructional services: Engineering WorkStations operations; learning management systems; presentation and lecture capture; remote connections via Citrix; departmental instructional labs; campus computer lab maintenance • Multimedia support: classroom and conference room technology support; digital signage; video conferencing; maintenance of A/V media rooms • Network connectivity: serve as first point of contact or liaise with central IT division in the event of network connectivity failure; patch network jacks in College facilities; serve as point of contact for expansion and maintenance of wireless network in College facilities; provide wireless accounts for guests of departments and units; add, delete, and maintain IP addresses for College networks; create, delete, and maintain DNS host records for domains used by College units • Engineering Portal applications: maintain, expand, and provide training on the Engineering Portal Framework, which hosts a variety of homegrown web applications used to support an array of business processes in the College and other units • Printer services: provide general assistance with printing and connecting to printers • General user support: provide IT support for university computers and devices at three levels (basic, standard, and research) • Server and HPC services: support servers and individual systems used by research groups, including backup, data center management, and hosting • Website services: design and maintain web presence for College of Engineering and departments

University of Illinois at Urbana-Champaign (cont.)

Engineering IT Shared Services

▶ **Supporting Technology**

- Ticketing system: RequestTracker

▶ **Funding Model**

- Engineering IT operates on a cost-recovery funding model. Units pay for services on behalf of their faculty, students, and staff, with the College subsidizing some common and widely used services. Central funding covers about half the cost of running the center. Individual faculty and research groups may contract with Engineering IT for services not covered by their home unit. Departments and research groups receive annual bills for their IT services.

▶ **Efficiency and Service Quality Indicators**

- Engineering IT's service portfolio has grown as the College's faculty-led governance has steadily requested and approved more IT services to be delivered from the organization. The center survived several rounds of severe central budget shortfalls without taking involuntary budget cuts in Engineering IT. Center leadership now describes the center as "a respected provider and IT partner to the academic side, with a seat at the table in College leadership and strategic planning."
- The center conducts an extensive customer service survey each year and uses response data to track trends related to IT satisfaction across the College of Engineering.

▶ **Additional Information**

- Engineering IT began as a merger of 10 smaller IT shops within the College of Engineering.

University of Illinois at Urbana-Champaign

Facilities & Services (F&S) Shared Administrative Services

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Champaign, IL

Enrollment: 33,955 undergraduate; 14,261 graduate (2018)

Employees: 2,367 full-time faculty; 822 part-time faculty; 7,800 non-faculty staff (2018)

Operating Expenditures: \$6.8B (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2003 • Current customer base: All Facilities & Services staff • Current FTEs in the shared services organization: 65 • Physical location of shared services staff: Colocated in a single office on the main campus • Reporting structure: The director of F&S Shared Administrative Services reports to the executive director of Facilities & Services. • Website: http://www.fs.illinois.edu/divisions/shared-administrative-services 		

► Consolidated Service Areas

X	Finance	X	Information Technology		Human Resources
X	Strategic Budgeting		Research Administration	X	Central Stores/Receiving
X	Procurement/Purchasing		Marketing/Communications	X	Service Office

University of Illinois at Urbana-Champaign (cont.)

Facilities & Services (F&S) Shared Administrative Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> General: financial reporting and analysis; management of major capital construction funds; development of rate structures; financial transaction processing
Strategic Budgeting	<ul style="list-style-type: none"> Facilities & Services unit budget development and management
Procurement and Purchasing	<ul style="list-style-type: none"> Accounts payable: process and submit invoices from external vendors for payment; contact vendors to obtain outstanding invoice credits owed to F&S and resolve pricing and other invoice issues P-Cards: oversee p-card use for nonrestricted purchases less than \$5,000 when a Standing Purchase Order (SPO) does not exist; match receipts from cardholders to the transaction report from the bank; resolve discrepancies by informing cardholder of discrepancies and asking for their help to resolve Purchasing: process and submit purchase requests to external vendors; process purchase order changes for order add-ons, substitutions, and deletions; co-establish and manage annual SPO limits for material, equipment, or services purchased on a regular basis from external vendors; assist in the development of specifications for Request for Proposals (RFP) and purchases with competitive bid processes; facilitate problem resolution with vendors Property accounting: oversee documenting of equipment that is <ul style="list-style-type: none"> not permanently attached to university buildings or grounds as fixed equipment or land improvement not consumable has a life expectancy greater than one year costs \$500 or more
Information Technology	<ul style="list-style-type: none"> Enterprise: AiM application and support; business intelligence; software development; Oracle database development; report development; data manipulation; special data requests; error tracking and resolution; Tier 2 and 3 support Support desk: Single point of contact Service Desk (phone, email, or service ticket); user accounts; computer consultations and repairs; design and deployment of Windows standardized systems; IT security response and mitigation (e.g., security patching); computer procurement and replacement; special equipment purchases (e.g., audio visual); network printer support; email and tools consulting; application and installation support; mobile device support; special project consulting; IT asset management; Tier 1 and 2 support Maintenance of infrastructure and systems: energy production systems; energy building control system; building access system; space management system; integrated workplace management system; general IT infrastructure
Central Stores and Receiving	<ul style="list-style-type: none"> Source and sell copy paper, janitorial supplies, maintenance/repair supplies, and restaurant supplies to Urbana campus units
Service Office	<ul style="list-style-type: none"> Process Facilities service requests, outages, and utility locates for the campus

University of Illinois at Urbana-Champaign (cont.)

Facilities & Services (F&S) Shared Administrative Services

▶ **Staff Distribution**

- Finance: 15 FTEs
- Strategic Budgeting: 1 FTE
- Procurement and Purchasing: 9 FTEs
- Information Technology: 19 FTEs
- Central Stores and Receiving: 17 FTEs
- Service Office: 4 FTEs

▶ **Supporting Technology**

- Finance: Banner
- Service Office: AiM (facilities management platform)

▶ **Funding Model**

- Each end-user is charged based on services used.

▶ **Efficiency and Service Quality Indicators**

- Center leadership cites the higher level of expertise gained from pooling resources as the greatest benefit of the center.

University of Louisville

Operations Support Services

Type of Institution: Public, Doctoral University:
Very High Research Activity



Location: Louisville, KY

Enrollment: 15,546 undergraduate; 5,856 graduate (2018)

Employees: 1,814 full-time faculty; 556 part-time faculty; 4,315 non-faculty full-time staff (2017)

Operating Expenditures: \$1.2B (2019)

► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2016 • Current customer base: About 50% of Health Sciences faculty and staff, as well as core administrative offices (e.g., President’s Office; Provost’s Office; Office of the Vice President for Audits, Risk, and Compliance; Office of the Chief Business Officer; Office of the Chief Operating Officer) • Current FTEs in the shared services organization: 41 • Physical location of shared services staff: Colocated in two offices, a main hub on the Belknap campus and a Health Sciences division office. Staff serving the Health Sciences location rotate on a weekly basis. Center staff also provide on-site services upon request. • Reporting structure: The executive director of Operations Support Services reports to the senior associate vice president for operations, who reports to the CFO. • Website: https://louisville.edu/businessoperations 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting		Research Administration	X	Customer Service and QI ¹
X	Procurement/Purchasing		Marketing/Communications		

1) Quality improvement.

University of Louisville (cont.)

Operations Support Services

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • General: billing and accounts receivable • Deposits: Health Sciences Office serves as an on-site deposit acceptance location for the university; accept deposits, scan checks, and verify deposits • Funding changes: process approved actions in PeopleSoft, including related payroll expense transfers; validate changes and confirm allowability of funding sources • Program reconciliations: reconcile financial and human resource/payroll activities and provide reports to key financial personnel for supported departments • Sponsored program support: reconcile sponsored programs for supported departments; affirm expense allowability; verify research incentive funds; confirm cost share calculations; work with central Sponsored Programs Office and departments to resolve issues • Travel requests and expense reports: intake travel request information; transfer request to PeopleSoft Financial travel authorization request; send the traveler a pre-trip email with links and information one week before travel; send post-travel email with reimbursement instructions within one week of return; receive receipts as incurred through mobile applications; follow up weekly with travelers to ensure all receipts are received prior to expense report submission • Finance process redesign and tool development: work with line staff and central offices to redesign processes and develop tools to improve workflow, transparency, and controls for processes
Strategic Budgeting	<ul style="list-style-type: none"> • Budget development: enter final budgets into management system and provide reports to senior personnel • Budget transfers: process budget transfers and revisions • Strategic planning: work with senior staff and department heads to strategically assess resources (financial and human) • Financial reporting and analytics: developing capacity in this area based on input from senior staff about desired data
Procurement and Purchasing	<ul style="list-style-type: none"> • Contracts: assist departments with contract processes and ensure that central purchasing processes are followed • Ordering: intake and process requested orders; place appropriate orders on the shared services p-card and allocate to the appropriate funding source; enter purchase orders and track on behalf of departments; process other types of payment requests that do not require a purchase order and cannot be placed using the p-card • P-cards: work with departments to ensure the appropriate business purpose aligns with funding source for transactions; review high-risk transactions, such as those by federally funded programs; work with central offices to resolve policy or allowability issues; support the OnBase workflow system that manages all p-card transactions and monthly activity reports
Human Resources	<ul style="list-style-type: none"> • Transactions: process approved HR actions related to recruitment, salary changes, position changes, and job changes • Strategic: work with supported departments and central HR to plan for reorganizations, salary equity, job postings, etc. • Onboarding: process onboarding requests for non-regular employees¹ from departments; conduct I-9 process; manage intake portal and associated automated communications; follow up on prospective hires; enter information on new hires into PeopleSoft; coordinate with central payroll to manage the hiring of nonresident aliens • Payroll: enter hourly time worked and monthly leave taken into PeopleSoft HR for supported departments
Customer Service and Quality Improvement	<ul style="list-style-type: none"> • Customer service support: address inquiries or route to subject matter expert; provide outreach to support processes, such as calls, reminder emails, weekly status reports, etc.

1) Non-regular employees include students, temporary workers, graduate assistants, house staff, and lecturers.

University of Louisville (cont.)

Operations Support Services

▶ **Staff Distribution**

- Finance: 13 FTEs
- Strategic Budgeting: 9 FTEs
- Procurement and Purchasing: 5 FTEs
- Human Resources: 8 FTEs
- Customer Service and Quality Improvement: 5 FTEs

▶ **Supporting Technology**

- Finance: Zendesk (customer support and ticket system), PeopleSoft, OnBase (enterprise information platform)
- Procurement and Purchasing: OnBase
- Human Resources: PeopleSoft
- Customer Service and Quality Improvement: Zendesk, Happy or Not (customer feedback tool)

▶ **Funding Model**

- No charge-backs are used; however, OSS contracts annually with the Health Sciences School of Medicine to provide services for revenue-based programs supported by the center.

▶ **Efficiency and Service Quality Indicators**

- The percentage of non-regular employees onboarded in full compliance has increased from 74% to 86%.
- According to customer data, 98% of transaction support customers are satisfied.
- Over one million sheets of paper have been saved by digitizing paper time sheets, onboarding packets, and p-card reallocation/reconciliation processes.
- Travel expense reports are now completed six times faster on average, and expense reports over 60 days old have decreased by 8%.

University of Louisville

Speed School of Engineering Business Center

Type of Institution: Public, Doctoral University:
Very High Research Activity



Location: Louisville, KY

Enrollment: 15,546 undergraduate; 5,856 graduate (2018)

Employees: 1,814 full-time faculty; 556 part-time faculty; 4,315 non-faculty full-time staff (2017)

Operating Expenditures: \$1.2B (2019)

► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2014 • Current customer base: All 8 departments within the Speed School of Engineering • Current FTEs in the shared services organization: 9 • Physical location of shared services staff: Colocated in a single on-campus office • Reporting structure: The director of the Engineering Business Center reports to dean of the School of Engineering. The school's lead fiscal officer is also closely involved with creating policies for the center. The lead fiscal officer attends meetings alongside deans, vice presidents, and other senior administrators about the financial processes within the university and then passes along this information as appropriate to the Business Center via email communications. • Website: http://www.louisville.edu/speed/businesscenter 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting	X	Research Administration		Other
X	Procurement/Purchasing		Marketing/Communications		

University of Louisville (cont.)

Speed School of Engineering Business Center

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Create travel and expense reports; verify funding sources; request proxy accounts; initiate travel authorizations • Reconcile accounts and provide monthly spreadsheets listing balances, expenses, and projections; process university transfers/journal vouchers as needed to correct charges
Procurement and Purchasing	<ul style="list-style-type: none"> • Reallocate p-card charges and approve purchase requisitions
Human Resources	<ul style="list-style-type: none"> • Submit job postings in the recruitment system; provide candidate resumes; submit request for official offer in recruitment system; finalize accepted offer in recruitment system • Submit HR information to central business operations and HR for hires, transfers, and terminations; input work time for biweekly employees; request Blackboard accounts for temporary lecturers; supervise work-study students • Submit tuition awards for students receiving a tuition benefit as part of their graduate teaching or research position
Research Administration	<ul style="list-style-type: none"> • Provide support to Speed School faculty with preparation and submission of grants, including budget preparation, compliance certifications, and cost share plans • Initiate funding changes, update calculation sheets, and process additional pay for faculty in relation to the Speed School's summer salary policy and the dean's research funding incentive policy

▶ Staff Distribution

- Finance and Procurement and Processing: 3 FTEs¹
- Human Resources: 2 FTEs
- Research Administration: 4 FTEs

▶ Supporting Technology

- Customers send questions or requests for services to a central email account that all Business Center staff can access.

▶ Efficiency and Service Quality Indicators

- Since implementation, the service has improved staff communication with customers through standardizing channels. Monthly expenditures and budgets are now scrutinized more closely as a result of the dedicated, specialized staff. Customers have reported that they appreciate being able to receive "one-stop shop" service for their requests.

1) Finance staff are cross-trained in procurement and purchasing tasks.

University of Kansas

Shared Service Centers

Type of Institution: Public, Doctoral University; Very High Research Activity



Location: Lawrence, KS

Enrollment: 19,338 undergraduate; 8,287 graduate (2018)

Employees: 3,288 full-time faculty; 604 part-time faculty; 3,271 full-time non-faculty staff (2018)

Operating Expenditures: \$698.2M (FY 2018)

► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2013 • Current customer base: Every campus unit (both academic and administrative) is required to use the center for all offered services. • Current FTEs in the shared services organization: 168.5 • Physical location of shared services staff: Four hubs each serve a segment of campus. • Reporting structure: The director of each hub reports to the Shared Service Centers' lead director, who reports to the senior associate vice provost of finance. Directors also have a dotted-line reporting relationship to the heads of the units in their customer base. • Website: http://ssc.ku.edu 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting	X	Research Administration		Other
	Procurement/Purchasing		Marketing/Communications		

University of Kansas (cont.)

Shared Service Centers

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Travel and expenses: verify funding sources; set up new proxies; create travel requests; assist with travel bookings; create and process travel expense reports • Procurement: finalize funding sources; assist with p-card purchasing; reconcile all p-card transactions; conduct initial audits for allowability; complete purchases and resolve outstanding purchase orders • Candidates and honorariums: assist with travel and accommodations; verify funding source and completeness of documentation; process procurement system check requests and submit; forward candidate documentation to the Budget Office • Tuition and scholarship: provide departments with endowment funding projections; complete scholarship forms; send award notifications • Deposits: organize courier delivery of deposits to the Bursar's Office; enter deposit information into PeopleSoft; prepare endowment deposit form and send to endowment account management • Accounting: create invoices and deposit funds; prepare accounts receivables aging reports • Budgeting: assist with budgeting and reporting as requested (strategic budgeting remains with individual departments)
Research Administration	<ul style="list-style-type: none"> • Award setup and modifications: facilitate chair approval of provisional accounts; submit request for provisional account to research administration; inform principal investigator (PI) of nonstandard terms and conditions; recommend budget adjustments to PI; facilitate creation of budget adjustment forms • Allowability review and expenditures: initial accountability review for all transaction types; serve as approval delegate on behalf of PI; complete appropriate form to process transactions • Award monitoring: generate and review monthly financial reports; monitor award balances and cost share; notify PI of project end; facilitate no-cost extensions; assist with subcontract plan implementation; distribute and track effort certifications • PI changes: complete payroll forms; pay final bills; prepare agency notification letters for approval and submission by research administration • Project closeout: review expenses for allowability; prepare cost transfers; submit payroll changes; send final closeout notifications • Other: initiate summer pay for faculty; process salary funding changes and funding adjustments; verify salary and sponsorship funding for graduate teaching assistants and graduate research assistants
Human Resources	<ul style="list-style-type: none"> • Recruitment: assist with creating position descriptions; facilitate information-gathering; review ad copy; route completed position bundle to HR; post advertisements; submit posting to recruitment system; coordinate interviews; request official offer via recruitment system; facilitate visa application; provide general guidance to hiring department • Onboarding: send onboarding documents to new hire; ensure completion of all required new hire documents; conduct initial orientation; take photo for ID and provide temporary parking pass; route completed onboarding packet to HR • Appointment maintenance: route personnel action form to effect changes • Time review: enter missed time card punches; escalate issues to HR/Payroll team as appropriate; send notifications about pending pay calculations; run reporting each pay period and review for missing or unapproved time; provide coaching for supervisors approving time and leave • Appointments: process position and funding changes; process appointments for graduate teaching assistants and graduate research assistants; prepare contracts and intent forms

University of Kansas (cont.)

Shared Service Centers

▶ Staff Distribution

- Finance: 88 employee FTEs, 8.5 manager FTEs
- Research Administration: 29 employee FTEs, 3.5 manager FTEs
- Human Resources: 31 employee FTEs, 4 manager FTEs

▶ Supporting Technology

- Finance: Oracle Cloud, Concur
- Human Resources: PeopleSoft
- Workflow: Perceptive Content (document management system, for access when moving documents outside of the university's financial or HR systems)

▶ Funding Model

- For most units, there is no charge-back. Units that are funded through tuition or state funds contributed to the initial SSC budget by transferring the base budgeted salary and fringe benefits of staff to the shared services unit.
- A few units on campus receive only fee revenue and did not have any base funds to transfer. These units are now billed annually for their usage based on an "averaged" shared services center salary and fringe benefits.

▶ Efficiency and Service Quality Indicators

- The shared services organization now employs roughly 20% fewer employees than when it began through economies of scale and attrition, resulting in estimated savings of approximately \$2M.

▶ Additional Information

- The first shared services center at the University of Kansas went live in 2013, supporting finance, HR, and research administration functions in the College of Liberal Arts and Sciences. Four others followed, each taking nine to twelve months to fully implement. Staff moved into the shared services centers in three to five waves, with nine to fifteen staff members in each wave. All five shared services centers were fully implemented in July of 2017.
- In January 2019, the shared services organization reorganized from five hubs to four, realizing even greater cost savings.

University of Maryland, Baltimore County

Shared Services Collective

Type of Institution: Public, Doctoral University: High Research Activity

Location: Baltimore, MD

Enrollment: 11,234 undergraduate; 2,428 graduate (2018)

Employees: 679 full-time faculty; 322 part-time faculty; 1,631 non-faculty staff (2018)

Operating Expenditures: \$457M (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2015 • Current customer base: Roughly 70% of faculty and staff utilize one or more of the seven shared service hubs, which serve Academic Affairs, the College of Engineering and Information Technology, the College of Natural and Mathematical Sciences, Student Affairs, the Office of Center Awards and Management, the Division of Professional Studies, and Enrollment Management. At least one additional hub is planned to open in the 2019–2020 academic year, which will serve the College of Arts, Humanities, and Social Sciences. • Current FTEs in the shared services organization: 46 • Physical location of shared services staff: Staff are based in multiple buildings across campus; they are co-located by hub, often in proximity to customers. • Reporting structure: Each hub reports to the dean or vice president of the division it serves. The campus-wide shared services initiative has two co-chairs, one of whom reports to the provost and the other to the vice president for administration and finance. • Website: https://sharedservices.umbc.edu/ 		

► Consolidated Service Areas

X	Finance	X	Information Technology	X	Human Resources
X	Strategic Budgeting	X	Research Administration		Other
X	Procurement/Purchasing		Marketing/Communications		

University of Maryland, Baltimore County (cont.)

Shared Services Collective

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Provide financial analysis, reporting, and reconciliation support • Process journal entries • Review funding sources for accuracy • Prepare and process cash deposits
Strategic Budgeting	<ul style="list-style-type: none"> • Provide quarterly forecasting and budget preparation and budget allocations • Produce financial and statistical reporting support • Lead monthly/quarterly budget meetings to review budget status
Procurement and Purchasing	<ul style="list-style-type: none"> • Process payment requests for vendors, employee reimbursements, travel, stipends, honorariums, and working fund payments • Create requisitions to pay vendors • Enter receipts when merchandise is received • Send requests to close purchase orders • Process procurement card purchases and perform reconciliation of procurement card activity
Human Resources	<ul style="list-style-type: none"> • Process payroll • Process onboarding paperwork • Manage position management and process pay changes • Provide training on time reporting, hiring/onboarding, payroll calendars, and assistance requests in ticketing system • Administer faculty contracts
Information Technology	<ul style="list-style-type: none"> • Desktop support • Report development and maintenance • Server and database administration and support
Research Administration	<ul style="list-style-type: none"> • Perform pre-award assistance with proposal creation and routing for institutional review and approval • Perform post-award financial accounting analysis and operational duties

► Supporting Technology

- Finance: PeopleSoft
- Human Resources: PeopleSoft, PageUp (recruitment and employee engagement)
- Ticketing system: RequestTracker
- Data warehouse: custom solution built with Blackboard Analytics (used for reporting, financial analysis, and reconciliations)

► Additional Information

- Three years of planning preceded the first shared services centers at UMBC. An academic and nonacademic center opened as the first two centers in 2015. UMBC plans to eventually support the entire campus through shared services centers.
- A shared services stakeholder group is currently developing metrics that will evaluate the service levels, productivity, efficiency, and customer satisfaction provided by the centers. These metrics will also be used to target opportunities for improvement or expansion of services offered.

The University of Memphis

Shared Services Center

Type of Institution: Public, Doctoral University: High Research Activity

Location: Memphis, TN

Enrollment: 17,396 undergraduate; 4,125 graduate (2018)

Employees: 921 full-time faculty; 508 part-time faculty (2018)

Operating Expenditures: \$47.7M (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2013 • Current customer base: <ul style="list-style-type: none"> ○ All administrative and academic units must process their Electronic Pay Action Forms (EPAFs) through the Shared Services Center, or roughly 75% of all pay assignments. ○ Some traveler groups are required to use the center for travel arrangements, and others do so voluntarily, amounting to about 25% of all travel transactions in total. • Current FTEs in the shared services organization: 2 • Physical location of shared services staff: Colocated in a single building on campus • Reporting structure: The Shared Services Center director reports to the vice president of business and finance. • Website: https://www.memphis.edu/ssc/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration		Other
	Procurement/Purchasing		Marketing/Communications		

The University of Memphis (cont.)

Shared Services Center

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	• Travel and expense: verification of funding sources; travel authorization; creation of travel expense reports
Human Resources	• General: process Electronic Personnel Action Forms (EPAFs) for faculty, staff, and students

▶ Staff Distribution

- Finance: 1 FTE
- Human Resources: 1 FTE

▶ Supporting Technology

- Finance: Chrome River
- Human Resources: Ellucian Banner
- Ticketing System: Fusion

▶ Efficiency and Service Quality Indicators

- Since the shared services center was implemented, campus has seen a significant decrease in the percent of errors in Electronic Personnel Action Forms that resulted in underpayment, overpayment, or no pay. The total number of EPAFs processed has also increased.

▶ Additional Information

- The shared services center also supports the university's Process Management Group, which focuses on finding efficiencies and savings opportunities through business process reengineering.

University of Michigan

Shared Services Center

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Ann Arbor, MI, plus additional campuses in Dearborne, MI, and Flint, MI

Enrollment: 43,387 undergraduate; 19,781 graduate (2018, all campuses)

Employees: 7,215 full-time faculty; 1,961 part-time faculty; 46,325 non-faculty staff (2018, all campuses)

Operating Expenditures: \$9.31B (FY 2018-2019, all campuses)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2014 • Current customer base: <ul style="list-style-type: none"> ○ All units on all three Michigan campuses and the health system, including every employee and their covered dependents, retirees and their covered dependents, students involved in student organizations or traveling as part of a university program, and all suppliers to the university and university health system. However, not every unit uses all services. ○ For units that are not required to participate in the center or for services that are opt-in, service managers market the services as part of their relationship portfolio and help the SSC teams have deeper conversations with potential clients, eventually leading to a roll-on for the service. • Current FTEs in the shared services organization: 240 • Physical location of shared services staff: Colocated in multiple on-campus offices • Reporting structure: The Shared Services Center director reports to the executive vice president for business/chief financial officer. • Website: https://ssc.umich.edu/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration	X	Administrative Support
X	Procurement/Purchasing		Marketing/Communications		

University of Michigan (cont.)

Shared Services Center

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Accounts receivable: prepare billing for sponsored projects, general billing for other activities, and billing for clinical trials; post payments for those activities; handle collections for all billing types • Travel and expense: prepare expense reports in travel system on behalf of faculty and staff; route reports for traveler submission and approval; prepare documentation for payment of travel expenses incurred by students or guests not in the travel system (the audit team performs a first-level, pre-payment audit against university policy and regulation for expense reports, regardless of preparer, and all non-purchase order vouchers) • Account reconciliation statements: review accounting activity for appropriate authorization and supporting documentation; research and reconcile financial posting errors and mismatches • Accounting: provide call center support for general accounting questions; prepare journal entries in finance enterprise resource planning (ERP) software on behalf of units; open and close accounts within the finance ERP; maintain finance department structure within the ERP; participate in month-end and year-end closing activities; provide introductory training for university finance administrators • Student organization accounting: accounting and payment support for student organizations • Contact center: answer general finance-related questions via phone or email from units, suppliers, and customers related to accounts payable, accounts receivable, and travel expense processing
Procurement and Purchasing	<ul style="list-style-type: none"> • Accounts payable: match purchase order to invoice; research and resolve discrepancies; prepare vouchers for all matches and resolved discrepancies; prepare non-purchase order vouchers on behalf of units and routes for approvals; process all e-settlement and electronic data interchange transactions; handle credit memos, refunds, and returned checks • PeoplePay: prepare and submit documentation of payments to individuals, including honoraria, relocation assistance, prizes, and gifts • Supplier management: complete all additions, changes, and terminations of suppliers into finance ERP; validate all supplier adds and changes for appropriateness and legitimacy; collect W-8s and W-9s
Human Resources	<ul style="list-style-type: none"> • Employment: assist with posting job offers in the recruitment system and on external websites; submit official offers and hire transactions in human resource management system (HRMS); order background checks and complete I-9 processing; conduct new hire orientation for staff hires • Data management: enters and audits data changes related to personnel transactions in HRMS • Benefits: process employee benefit elections and changes in HRMS • Time and leave: set up payroll timekeeping groups; assist with time sheet compliance notifications and audits; maintain leave accruals • Verification of employment: complete all verification of employment requests • Unit hiring support: prepare job posting requests, screen resumes, schedule interviews, prepare personnel change requests • J1 visa coordination: work with potential visiting scholars and sponsoring units to prepare J1 Visa requests (DS2019); conduct English proficiency assessments • Contact center: answer general HR- and benefits-related questions received via phone or email from employees, dependents, and retirees
Administrative Support	<ul style="list-style-type: none"> • Document imaging: triage incoming accounts payable emails • Lean consulting: provide training, mentoring, and consulting services around process improvement methodologies • Survey support: provide development and support for the business and finance employee engagement survey; provide consulting, development, and support for customer satisfaction surveys used by service-providing units on campus (including the shared services center)

Source: University of Michigan, Ann Arbor, MI.

University of Michigan (cont.)

Shared Services Center

▶ Staff Distribution

- Finance: 95 FTEs
- Procurement and Purchasing: 50 FTEs
- Human Resources: 65 FTEs
- Administrative Support: 30 FTEs

▶ Supporting Technology

- Finance: PeopleSoft
- Procurement and Purchasing: PeopleSoft
- Human Resources: PeopleSoft
- Administrative Support: Perceptive Content (document management system)
- Ticketing: ServiceNow

▶ Funding Model

- Each service is charged differently, depending on the function and whether it is mandatory or opt-in.
 - Mandatory HR services: each major participating unit pays a percentage of the shared services center's cost for HR services, based on their percentage of the FTE count of all participating units as of November 1 of the calculation year. The charge is recalculated every three years and levied monthly.
 - Mandatory finance and procurement services: each major participating unit pays a percentage of the shared services center's cost for services equal to its percentage of the journal lines of all participating units for the fiscal calculation year. The charge is recalculated every three years and levied monthly.
 - All opt-in services: a unit is charged the fully loaded cost of the estimated FTE effort to complete the services provided. The estimate is charged monthly, and a true cost is calculated at the end of the fiscal year based on actual usage and FTE effort.

University of Michigan (cont.)

Shared Services Center

► Efficiency and Service Quality Indicators

- The center's service agreement specifies a turnaround of three days and 95% accuracy for the finance and procurement functions, a turnaround of five days and 95% accuracy for HR, and 80% of calls answered within 30 seconds for contact centers.
- When the shared services center opened in 2014, only 25% of units on campus held a favorable opinion about it. By 2018, that favorability rating had risen to 86%, due to a comprehensive customer service initiative dubbed the Ridiculously Awesome Customer Service (RACS). The center's RACS initiative orients all staff members to prioritize customer experience and service quality, as well as to implement Lean methods for continuous improvement and engagement within the center. All staff members are trained in Lean practices, and center staff credit Lean with allowing the center to expand from 10 service offerings to 23 in only four years, without raising costs. Many campus figures describe the center's utilization of Lean as a model for others on campus.
- Campus leaders, including the CFO, have praised the center for its ability to create substantial efficiencies while constantly providing high-quality, value-added services, particularly for key transactions such as reporting, hiring, visa processing, and payment to suppliers. School of Business staff praised the center team as being "proactive, flexible, and customer-focused in everything they do."

► Additional Information

- Although the shared services center does not use a conventional service-level agreement (SLA), it uses a similar document called a Partnership Agreement, which emphasizes the importance of all parties working together to provide timely and accurate transactions and information. The center also has Operating Agreements with its major partners in the business process (e.g., central HR and central Finance), which focus on the respective roles and responsibilities within the business process. The documents set agreed-upon targets for timeliness and accuracy, with monthly reporting of metrics. Many of the major units have developed their own smaller shared services groups that collectively perform additional business functions (both HR and Finance); these often serve as the primary contacts between the unit and the main shared services center (which is profiled here).

University of North Carolina at Chapel Hill

Service Center of Excellence

Type of Institution: Public, Doctoral University:
Very High Research Activity

Location: Chapel Hill, North Carolina

Enrollment: 18,862 undergraduate; 11,049 graduate (2018)

Employees: 4,381 full-time faculty; 781 part-time faculty (2018)

Operating Expenditures: \$257.9M (2018)



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2016 • Current customer base: All departments within the Finance and Operations division, as well as a small number of other departments that have opted in • Current FTEs in the shared services organization: 99 • Physical location of shared services staff: 84 FTEs work in an off-campus office, and an additional 15 FTEs are remote. • Reporting structure: The Service Center of Excellence director reports to the senior associate vice chancellor for finance and operations. • Website: https://fo.unc.edu/service-center-excellence/ 		

► Consolidated Service Areas

X	Finance	X	Information Technology	X	Human Resources
X	Strategic Budgeting		Research Administration	X	Continuous Improvement, Staff Development, and Engagement
X	Procurement/Purchasing	X	Marketing/Communications		

University of North Carolina at Chapel Hill (cont.)

Service Center of Excellence

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Travel expense authorization and reimbursement: pre-authorization; airfare booking; conference and workshop fee payment; reimbursement for other authorized travel-related expenses • Employee expense reimbursement: validate, verify, and process employee non-travel expenses for payment • Business and financial systems access: coordinate system access requests for departmental and campus-wide business and financial access; conduct semiannual audit of access • Customer billing: provide intradepartmental billing support with rate development, billing transactions, journal entries, reconciliation, deposits, and accounts receivable aging and collection; assist with external customer billing support for a few customers (e.g., property offices) • Capital project budgeting and costing: project setup; budget adjustments; payment processing; project closeout; reconciliation; cash flow analysis
Strategic Budgeting	<ul style="list-style-type: none"> • Strategic budgeting: support annual budget process; development of rates and fees; manage budget reporting, including budget-actual reporting, income statements, and balance sheets; perform ad hoc analysis and special studies
Procurement and Purchasing	<ul style="list-style-type: none"> • Invoice payment: validate, verify, and process vouchers and purchase order invoices for payment • Purchase requests: assist with the submission, verification, and processing of requests to purchase goods and services • Supplier management: facilitate creation of new suppliers and update existing suppliers in PeopleSoft
Human Resources	<ul style="list-style-type: none"> • Affiliate requests: facilitate individual requests for creating, reactivating, or terminating personal identification numbers of university affiliates • Position classification: guide and support supervisors through process for classifying positions; maintain the integrity of the State of North Carolina's career banding program and the Department of Labor's prescribed Fair Labor Standards Act regulations • Salary administration: guide supervisors through salary administration process based on university pay factors • Employee recruitment and onboarding: help departments with initiating and completing activities associated with recruiting and onboarding employees • Employee separation and exit: support both staff and supervisors in administering the separation and exit process for employees • Benefits and leave administration: assist employees and supervisors with questions and processes regarding leave and benefits; provide direction and support during the fall open enrollment period; support benefit change process when a qualifying status change occurs • Employee and management relations: provide resources to help navigate Employee and Management Relations processes, including performance management and the employee disciplinary process

University of North Carolina at Chapel Hill (cont.)

Service Center of Excellence

► Menu of Shared Services Offerings

Functional Area	Specific Services
Information Technology	<ul style="list-style-type: none"> • Application support: business-specific application support including initial planning and consultation with business units and vendors, initial configuration, testing, and installation, user account access and setup, backend server support, and response to production errors or emergencies • Business Device Support: provide support to various business devices across campus including point of sale, vending, door access, parking access, digital signage, and time information management (TIM) clocks. Desktop support: remote and on-site desktop support for help requests that have been escalated from the IT department, including system configuration, troubleshooting, problem resolution, patching, security remediation, and training • Other services and support: equipment installation, relocation, and removal of equipment; incident support and evaluation, repair and replacement, configuration, administration, and user training; and systems maintenance for charge-back, cost-recovery, or expense tracking • Account management services: support Office 365 groups, teams, and SharePoint access to financial reporting access, business unit account access needs; establish new accounts; maintain security groups; provide access and maintain permissions; account termination • Purchasing and lifecycle management: manage all workstation and business hardware purchasing and management needs, including pre-purchase consulting services; centralized procurement of standard workstation devices; receiving and asset management; coordination of device refresh program; secure disposal of assets • Security management: conduct information security vulnerability assessment, compliance tracking, and remediation to customers ensuring that all devices are up to date and secure, including workstation and data security management; policy and procedure definition; threat identification and remediation; monitoring and ensuring compliance; security awareness training to prevent risks • Project management: IT support and consultation on a variety of projects throughout Finance and Operations (F&O) divisions, including pre-project consultation; requirements definition and planning; project execution; performance monitoring and cost control; project review and closeout • Mobile device management: setup and maintenance of approved mobile communication devices, including pre-purchase consulting; development of common configuration; equipment deployment; incident and lifecycle support; secure disposal of assets • Web tool development: backend application integration with the F&O website; project management in web tool development; integration with F&O data sources and applications • Printing support: configure and manage file server-based queues and printer driver definitions; respond to requests for support; coordinate with vendors for multifunction printer device support; assist system owners to support specialty printers, plotters, and scanners • Training: develop, schedule, and deliver training on security awareness, network and resources orientation, Microsoft productivity tools, and specific business unit applications

University of North Carolina at Chapel Hill (cont.)

Service Center of Excellence

► Menu of Shared Services Offerings

Functional Area	Specific Services
Marketing and Communications	<ul style="list-style-type: none"> • Strategic communications and marketing planning: assist with projects or initiatives that communicate across departments, campus, or beyond; create comprehensive communication plans that share key messages to the right audiences across multiple platforms • Websites: custom design of websites or web pages, including site maps, wireframes, design, and coding; support complete sites via content updates and troubleshooting as well as training for management; custom application development; support using Google Analytics for tracking website metrics; provide detailed information and reports about visitors to websites • News and media relations: provide support to promote news, events, and initiatives; research, write, and conduct interviews for news story development; share news through multiple platforms including website, campus publications, and social media; respond to media queries and student project requests; serve as a liaison to the central communications division; coordinate responses to public records requests, particularly those with a media component • Print design and promotion: print materials including postcards, flyers, posters, brochures, and annual reports; provide unique design and message service for each job while ensuring consistency with greater F&O brand and communications strategy • Digital design and production: provide photography, video, script-writing, and post-production services for a variety of projects; create PowerPoint and other visual presentations, including display screen graphics; manage social media accounts; serve as liaison to campus design, video, and photography resources as well as to freelancers for projects that need outsourcing • Editorial: provide writing, editing, and proofreading services for projects, including executive communications and website content
Continuous Improvement, Staff Development, and Engagement	<ul style="list-style-type: none"> • Training courses and documentation: create or update training materials, including computer-based training, webinars, slide presentations, classroom manuals, quick reference cards, 360° virtual reality demos, and training delivery; provide PeopleSoft and other finance training for faculty and staff across campus • Training consultation: program evaluation and design; plan new training initiatives or improvements to existing programs; provide insight and tools to assist with needs assessment, training program evaluation, and evidence-based instructional design strategies; one-on-one consultations with training specialists • Business process transformation: support current-state process mapping; clarify and document existing processes to ensure consistency and customer service; Lean process improvement

University of North Carolina at Chapel Hill (cont.)

Service Center of Excellence

▶ **Staff Distribution**

- Finance, Strategic Budgeting, and Procurement and Purchasing: 44 FTEs¹
- Human Resources: 14 FTEs
- Information Technology: 22 FTEs
- Marketing and Communications: 11 FTEs
- Continuous Improvement, Staff Development, and Engagement: 8 FTEs

▶ **Supporting Technology**

- Ticketing: currently Remedy; the Service Center of Excellence plans to transition to ServiceNow in late 2019.

▶ **Funding Model**

- The Service Center of Excellence has historically been funded centrally through existing salaries budgeted from employees' original departments. Leaders are currently considering a charge-back model that utilizes a simple allocation based upon overall service benefit.

▶ **Additional Information**

- All five functional areas launched at the same time.

1) Staff are cross-trained in multiple functions.

The University of Texas at Dallas

Central Business Office

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Richardson, TX

Enrollment: 18,470 undergraduate; 9,172 graduate (2018)

Employees: 987 full-time faculty; 352 part-time faculty; 4,262 non-faculty staff FTEs (2018)

Operating Expenditures: \$668.3M (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2015 • Current customer base: Central Business Office serves 11% of campus across various administrative and academic units. • Current FTEs in the shared services organization: 6 • Physical location of shared services staff: Colocated in a single building on campus • Reporting structure: The Central Business Office director reports to the assistant vice president of finance/chief budget officer. • Website: https://www.utdallas.edu/finance/operations/index.html 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting	X	Research Administration	X	Training and Help Desk
X	Procurement/Purchasing		Marketing/Communications		

The University of Texas at Dallas (cont.)

Central Business Office

► Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Travel: submit, review, and approve travel reimbursements after confirming funding and appropriate documentation • Cost centers: create new cost centers for special projects, new faculty, or to change funding sources; identify cost centers to close, work with accounting to ensure all transactions have cleared, and submit close requests • Expenses: provide monthly financial reports and analysis of expenses; reconcile all charges monthly and save appropriate backup documentation
Strategic Budgeting	<ul style="list-style-type: none"> • Assist with annual budget preparation by ensuring all staff positions are funded and moving funds into specific accounts (travel, operating, etc.); review and monitor cost centers; enter budget journals to receive revenue or update funding amount; transfer funds as needed; process corrections for expense errors; review and process request for additional funds
Procurement and Purchasing	<ul style="list-style-type: none"> • Create purchase orders for standard and nonstandard requests; verify funding sources; assist with additional forms for high-dollar/special items as needed; review, submit, and approve requisition requests to workflow; create receipts; contact vendors to resolve issues; confirm payment approval/purchase order increases; enter requests for check and submit to procurement
Human Resources	<ul style="list-style-type: none"> • Recruitment: confirm available funding for positions; prepare job-posting paperwork and submit to HR for approvals; create job postings in recruitment system • Hiring: disposition applicants and submit hiring proposals in recruitment system; submit and approve new hire, transfer, termination, and supplement requests through PeopleSoft • Onboarding: schedule new employee onboarding; enter access requests and update directory
Research Administration	<ul style="list-style-type: none"> • Provide oversight and administration of the centrally funded faculty startup program, such as monitoring spending, reporting, budget adjustment, and auditing
Business Service Training	<ul style="list-style-type: none"> • Create training material and conduct hands-on classes for employees who have been at the university for at least three months in an administrative/business role, focusing on topics related to purchasing, electronic HR actions, budget analysis, and transactions to move funds or correct errors
Help Desk	<ul style="list-style-type: none"> • Respond to all questions relating to the Office of Budget and Finance via email or phone, transferring to specific department contacts if needed
Research Administration	<ul style="list-style-type: none"> • Provide oversight and administration of the centrally funded faculty startup program, such as monitoring spending, reporting, budget adjustment, and auditing
Business Service Training	<ul style="list-style-type: none"> • Create training material and conduct hands-on classes for employees who have been at the university for at least three months in an administrative/business role, focusing on topics related to purchasing, electronic HR actions, budget analysis, and transactions to move funds or correct errors
Help Desk	<ul style="list-style-type: none"> • Respond to all questions relating to the Office of Budget and Finance via email or phone, transferring to specific department contacts if needed

The University of Texas at Dallas (cont.)

Central Business Office

▶ Staff Distribution

- 6 cross-trained FTEs provide services in all functional areas.

▶ Supporting Technology

- Finance: Box, Jaggaer, PeopleSoft
- Strategic Budgeting: PeopleSoft
- Procurement and Purchasing: Jaggaer
- Human Resources: PeopleSoft, PeopleAdmin

▶ Efficiency and Service Quality Indicators

- The Central Business Office has received an average customer service score of 4.7/5 on satisfaction surveys between 2015 and 2018.
- Selected comments from the customer survey:
 - "The Central Budget Office is an exceptional team, and all members have provided great service; they are unusually capable of filling in for each other with no drop in service."
 - "Everyone I interact with on a regular basis is friendly, helpful, courteous, and knowledgeable. I feel that processes are streamlined and improving all of the time."
- The total budget managed by the Central Business Office has increased from \$9,000,000 to \$42,000,000, and the number of customers served has increased to more than 280 people.

University of Washington

College of Arts and Sciences (CAS) Center for Shared Services

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Seattle, WA

Enrollment: 38,473 undergraduate; 12,993 graduate (2019)

Employees: 6,857 full-time faculty; 1,883 part-time faculty; 22,912 non-faculty staff (2018)

Operating Expenditures: \$7.84B (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2011 • Current customer base: 32 of 49 units within the College of Arts and Sciences • Current FTEs in the shared services organization: 6 • Physical location of shared services staff: Colocated in a single office on the main campus • Reporting structure: The Center for Shared Services director reports to CAS's director of business and administration. • Website: https://ssc.artsci.washington.edu/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration		Other
X	Procurement/Purchasing		Marketing/Communications		

University of Washington (cont.)

College of Arts and Sciences (CAS) Center for Shared Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">• Travel and expense processing: travel advances, per diem policy, invoice management, blanket purchase orders, non-purchase order payment processing• Staffing: summer staffing and budget creation assistance• Honoraria and awards: general honoraria and awards processing, speaker invitation assistance, P2I completion and submission
Procurement and Purchasing	<ul style="list-style-type: none">• General purchasing• P-card purchasing and reconciliation• Blanket purchase order setup and processing• Requisition setup
Human Resources	<ul style="list-style-type: none">• Hiring: H1-B and J-1 visa applications and processing• Payroll processing: time/absence tracking, payroll submission, stipend processing

▶ Staff Distribution

- Finance: 2 FTEs
- Procurement and Purchasing: 2 FTEs
- Human Resources: 2 FTEs

▶ Supporting Technology

- Finance: Ariba
- Procurement and Purchasing: Ariba
- Human Resources: Workday
- Ticketing: RequestTracker

▶ Efficiency and Service Quality Indicators

- Ticket turnaround time has decreased to 1–4 business days, depending on the type of request.

▶ Additional Information

- The Center for Shared Services has expanded from serving 11 humanities departments in 2011 to 32 units representing every division of CAS in 2019.

University of Washington

Health Sciences Administration Center for Shared Services

Type of Institution: Public, Doctoral University: Very High Research Activity

Location: Seattle, WA

Enrollment: 38,473 undergraduate; 12,993 graduate (2019)

Employees: 6,857 full-time faculty; 1,883 part-time faculty; 22,912 non-faculty staff (2018)

Operating Expenditures: \$7.84B (2019)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2017 • Current customer base: Health Sciences Administration faculty and staff (approximately 15 units and 1,000 staff members) • Current FTEs in the shared services organization: 12 • Physical location of shared services staff: Colocated in a single office on the main campus • Reporting structure: The Health Sciences Administration Center for Shared Services director reports to the executive director of Health Sciences Administration. • Website: http://depts.washington.edu/hscss/ 		

► Consolidated Service Areas

X	Finance	X	Information Technology	X	Human Resources
	Strategic Budgeting		Research Administration		Other
X	Procurement/Purchasing		Marketing/Communications		

University of Washington (cont.)

Health Sciences Administration Center for Shared Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none"> • Travel and reimbursement: assist with travel purchases; process travel expense reports using CSS forms • Billing/accounts receivable: validate that goods/services were rendered; generate and send invoices on behalf of CSS customers for payment; process payments when received; follow up as appropriate for payment • Reconciliation: provide reconciliation services on a continuous basis for all supported customers; respond to audit requests; maintain records per UW policy • Pre-travel: work with traveler or customer setting up travel with assistance finding best flights, hotels, etc.; book if requested
Procurement and Purchasing	<ul style="list-style-type: none"> • Prepare bid documents for high-volume, low-dollar purchases; work with departments to determine appropriate channel, vendor, and pricing; process purchase orders and requisitions; administer access and maintain user profiles for credit cards and online financial systems
Human Resources	<ul style="list-style-type: none"> • Recruiting: assist with recruiting process; create job postings; coordinate interviews; assist with offer packages and communication; provide general navigation through various UW systems
Information Technology	<ul style="list-style-type: none"> • General: full-service desktop support; software updates and upgrades; lifecycle management; website support; server operations maintenance; assist with special projects

▶ Staff Distribution

- Finance and Procurement and Purchasing: 3 FTEs¹
- Human Resources: 1 FTE
- Information Technology: 7 FTEs

▶ Supporting Technology

- Finance and Procurement and Purchasing: Ariba, PurchasePath (internal web-based ordering system), Fastrans (supply chain management and logistics), QuickBooks
- Human Resources: Workday, UWHires (internal recruitment system)
- Ticketing: ServiceNow

▶ Funding Model

- The Health Sciences Administration Center for Shared Services utilizes a rate model with specific charges for services, governed by service-level agreements (SLAs). The rate varies based on the service provided (e.g., IT charges are organized by device, while finance-related charges are by transaction).

▶ Efficiency and Service Quality Indicators

- IT services utilization grew quickly during its first year, in terms of both the number of support requests and the number of units/departments requesting shared services support. The center's services are less expensive than those of central IT and include desktop support, which central IT does not offer.

1) Staff are cross-trained.

Utah State University

Business Services

Type of Institution: Public, Doctoral University: High Research Activity

Location: Logan, UT

Enrollment: 24,618 undergraduate; 3,061 graduate (2018)

Employees: 1,112 full-time faculty; 128 part-time faculty; 1,553 non-faculty staff (2018)

Operating Expenditures: \$733M (2018)



► Center Overview

Single, centrally managed center	Multiple, centrally managed hubs	Single, unit-managed center
<ul style="list-style-type: none"> • Year established: 2013 • Current customer base: 100% of academic and administrative units, including those on satellite campuses • Current FTEs in the shared services organization: 185 • Physical location of shared services staff: All Business Services staff remain embedded in the college they serve, either in a colocated space designated for the shared services teams or dispersed throughout departments, based on the availability of space. • Reporting structure: Each college's shared services team is lead by a financial officer who has a shared reporting line to both the vice president for business and finance and the head of the respective college. This arrangement is a product of initial negotiations surrounding the structure and oversight of shared services. • Website: https://www.usu.edu/business-services/ 		

► Consolidated Service Areas

X	Finance		Information Technology	X	Human Resources
X	Strategic Budgeting		Research Administration		Other
	Procurement/Purchasing		Marketing/Communications		

Utah State University (cont.)

Business Services

▶ Menu of Shared Services Offerings

Functional Area	Specific Services
Finance	<ul style="list-style-type: none">• Financial management: budget management; reconciliations; reporting; train unit staff in financial processes and terminology; support some units with grant applications and administration• Travel transactions: review all travel approvals and reimbursements for correct accounts and policy compliance; initiate these transactions in some units• Journal vouchers: initiate and review• Purchasing: manage p-cards; review transactions for policy compliance
Human Resources	<ul style="list-style-type: none">• Hiring: general support; track applicants; advertise open positions• Onboarding: file and manage I-9s• Employment management: initiate and review all employment forms related to hiring, termination, salary adjustments, and FTE changes
Strategic Budgeting	<ul style="list-style-type: none">• Prepare analysis for decision support; manage annual budgeting process; analyze performance of initiatives and strategic plans

▶ Supporting Technology

- All functional areas: Banner
- Workflow: ServiceNow

▶ Efficiency and Service Quality Indicators

- Previously, many employees administered the university's financial systems, including faculty and department heads. Most of these employees had little or no formal training and required significant support from central offices to complete their tasks. Since implementing the Business Services model, the professionalism and quality of work completed by staff has increased, and they require far less central support.
- The Business Services model aligned all finance staff under one reporting line, with a clearly organized team for each department, resulting in much quicker implementation time for new processes.
- Due to process standardization as a result of centralization, the university now has a much more robust compliance and quality control process. All transactions are now reviewed, and all reports are generated by a qualified professional.