



**SHARED SERVICES
PROJECT UPDATE**

OCTOBER 2018

WHAT WE WILL DO TODAY

- / How Today Will Work
- / Background: What is Shared Services?
- / WVU Shared Services Project
- / WVU Shared Services Delivery Model
- / Next Steps

HOW TODAY WILL WORK

- / Hear from Rob and Lisa
- / Open question-and-answer session

BACKGROUND: WHAT IS SHARED SERVICES?

- / Shared services is a service-delivery model that involves the integration of certain operations that support multiple parts of the same organization.
- / A shared services model seeks to **create greater efficiencies** and **reduce duplication of efforts** through the **standardization** and **optimization** of certain **operational and transactional tasks**.
- / Organizations that leverage a shared services model typically have a dedicated service center, which serves as a single point of contact for services and support.

WVU SHARED SERVICES PROJECT

/ The WVU Shared Services Project developed out of the spring 2016 Transformation Through Innovative Business Practices initiative, which sought to:

- / Simplify and standardize business functions**
- / Reduce the cost of procuring goods and services**
- / Curtail spending without impacting services and quality**

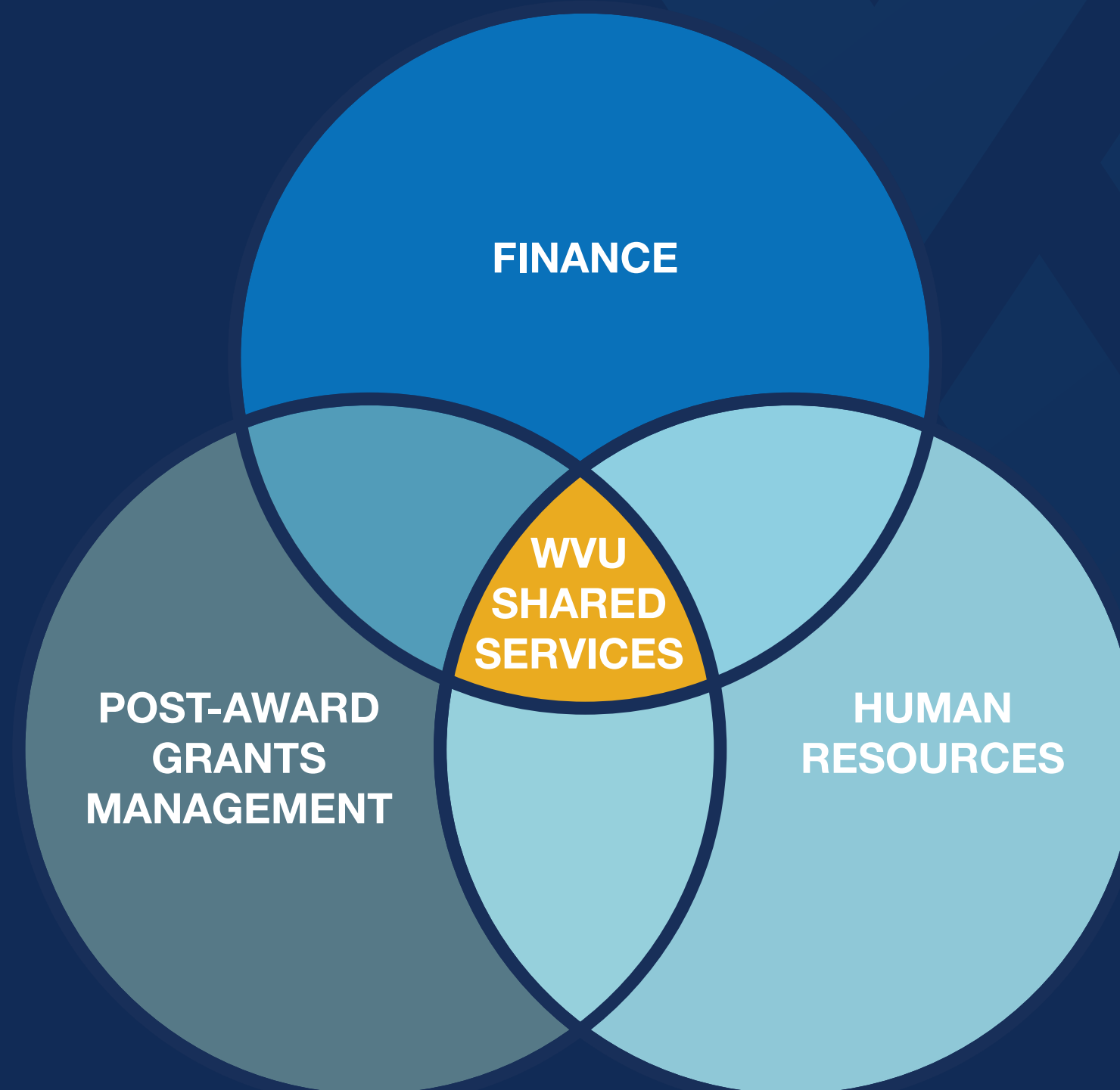
WVU SHARED SERVICES PROJECT

/ An initial work-activities assessment was conducted by the University in FY2017. Findings included:

- / **Service and support** currently are **not standardized** and are **fragmented**.
- / **Employees** are performing **transactional work** instead of functional and strategic activities.
- / **Transactional work** currently is between **30-65%** of total work completed in focus areas.
- / Some units **duplicate administrative services** already provided.

WVU SHARED SERVICES ORGANIZATION

/ The WVU Shared Services Project is designed to simplify and standardize academic support activities in the areas of **finance**, **human resources** and **post-award grants management**.



- / IMPROVE SUPPORT WITH MINIMAL DISRUPTION TO TEACHING, RESEARCH AND SERVICE.
- / FREE UP ADDITIONAL FACULTY TIME TO SPEND ON TEACHING, RESEARCH AND SERVICE.
- / CREATE CAREER DEVELOPMENT PATHS FOR OUR ADMINISTRATIVE STAFF.
- / ELIMINATE DUPLICATION OF EFFORT AND STANDARDIZE PROCESSES TO IMPROVE EFFICIENCY.

WVU SHARED SERVICES PROJECT GOALS

- / Improve **customer service** to faculty and academic staff – allowing them to focus on teaching and research.
- / Create **efficiencies** in **systems** and **processes** and allow employees to become experts in specific areas instead of partially supporting various functions.
- / Eliminate **duplication of services**.
- / Provide **one digital location** (knowledge base) for all guidance on processes relating to **human resources**, **finance** and **post-award grants management**.

PROJECT EFFORTS TO DATE

/ The project primarily has focused on planning and pre-implementation activities:

- / Evaluation of work-activities assessment results
- / Policy standardization
- / Process redesign
- / Technology evaluation and requirements development

SERVICE DELIVERY: SHARED SERVICE CENTER

- / The **service center** will handle **basic Q&A** and **transactional support** for faculty and staff.
- / Customers will be able to contact the **service center** via **telephone**, an **online portal** or **in-person** through a **storefront**.
- / When a customer reaches out for support, an **incident/service request** will be logged via a **case-management system**.

SERVICE DELIVERY: SHARED SERVICE CENTER

/ Activities will include:

- / Answering basic questions
- / Performing transactions
- / Providing administrative support
- / Running and distributing reports
- / Analyzing routine data

SERVICE DELIVERY: SBAs AND GRANTS MANAGERS

- / **SBAs** and **grants managers** will be strategic resources embedded in the colleges/schools and other non-central units.
- / This team will work closely with the **central units** and provide **escalated support** for the **service center**.

SERVICE DELIVERY: SBAs AND GRANTS MANAGERS

/ Activities will include:

- / Advising/consulting with planning unit administrators
- / Identifying/addressing planning unit opportunities and issues
- / Serving as strategic resources for college/unit leaders
- / Providing budgeting/forecasting support
- / Liaising with functional central offices
- / Assisting with the deployment of functional central office programs
- / Managing post-award grants

SERVICE DELIVERY: CENTRAL UNITS

- / **Central units** will remain functional resources that provide University-wide programmatic services.
- / This team will work closely with the **SBA**s and **grants managers** and provide **escalated support** for the **service center**.

SERVICE DELIVERY: CENTRAL UNITS

/ Activities will include:

- / Developing strategy and conducting institutional planning
- / Designing programs
- / Developing and governing policies
- / Delivering specialty services
- / Ensuring compliance
- / Managing, assessing and generating functional data

NEXT STEPS

/ The planning and implementation phase will continue through fiscal year 2020 and culminate in the creation of the service center.

/ Organization:

/ Working with divisions/units to identify positions that may transition into the shared services organization. This process likely will take several months.

/ Operations:

/ Compiling desktop procedures and identifying/deploying case-management system.

/ Creating knowledge base articles for the service center.

/ Setting up and testing the service center call system.

/ Training employees.

/ All of these efforts are designed to move us closer to our goal of improving customer service.

/ We will continue to provide frequent updates as the WVU Shared Services Project progresses.

QUESTIONS?

CONTACT INFORMATION

- / Visit shareservices.wvu.edu for more information on the WVU Shared Services Project.
- / Contact Lisa Sharpe at Lisa.Sharpe@mail.wvu.edu or 304-293-2029 with any questions.
- / An archived version of this Campus Conversation will be available at bureaucracybusters.wvu.edu/campus-conversation.
- / You may continue to submit questions to campusconversations@mail.wvu.edu.
- / Stay tuned for upcoming Campus Conversations.