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.
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
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.
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**.

- **Finance**
- **Post-Award Grants Management**
- **Human Resources**

**WVU Shared Services Organization**

- 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**.
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
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
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
Central units will remain functional resources that provide University-wide programmatic services.

This team will work closely with the SBAs 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
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?
Visit sharedservices.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.