WHAT WE WILL DO TODAY

/ How Today Will Work
/ Background
/ WVU Shared Services Center
/ Current Activities and Next Steps
HOW TODAY WILL WORK

/ Hear from Paula and Lisa
/ Open question-and-answer session
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 designated single point of contact (i.e., front door) typically is defined for clear communication between a Shared Services organization and its customers.

/ Shared Services organizations exist at many other higher education institutions; however, no two models are exactly the same.

/ Some Shared Services organizations in higher education focus on service delivery for a specific function (e.g., payroll or human resources), while others are designated for certain areas of an institution (e.g., a particular college, school or program).
The WVU Shared Services project developed in spring 2016 out of the Transformation Through Innovative Business Practices initiative.

An assessment of work activities across WVU was completed in fall 2016, which reported:

- Service and support often are fragmented and not standardized.
- There was duplication of work between units.
- Transactional work was highly distributed among positions — even those positions with a more strategic focus.
Since the assessment, a small team has worked with individuals across the institution to review policies and procedures and develop an implementation plan to reduce duplication of work and improve customer service.

The plan became the WVU Shared Services Project, which focused on the areas of human resources, finance and sponsored-project financial management.
VISION AND GOALS

VISION STATEMENT

Redesign business support activities with the infusion of technology and data accuracy to empower our workforce, resulting in trusted and timely customer service.
VISION AND GOALS

GOALS
/ Improve customer service to faculty and 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 tools — such as a digital location (knowledge base) and online community — for all guidance on activities related to human resources, finance and sponsored-project financial management.
SERVICE-DELIVERY MODEL

// WVU Shared Services will:

// Offer faculty and staff a **clearly defined means** to **access support** for the areas of **human resources**, **finance** and **sponsored-project financial management**.

// Enhance and extend support — faculty and staff will be able to access **live assistance Monday through Friday**, from 7 a.m. to 7 p.m. via **phone**, **email**, **online chat** and **walk-up support** (i.e., **Shared Services storefronts**).

// Provide an **online community** available **24/7** to submit **service requests**, access **frequently asked questions** and share information through a **digital library** and **chat groups**.
The WVU Shared Services-Delivery Model comprises:

- **Centers of Expertise**, which will provide University-wide strategic, programmatic, planning and governance activities.

- **HR Partners, Strategic Business Partners** and **Grants Managers**, who will serve as resources embedded in units to provide advisement to planning unit administrators and principal investigators in the areas of human resources, financial planning, forecasting, budgeting and post-award activities.

- The **WVU Shared Services Center**, which will focus on customer care and transactional support in the areas of human resources, finance and sponsored-project financial management.

- Each of these groups will partner with the others to form an overall **system of support**.
The areas of the WVU Shared Services-Delivery Model include:

- Customer Care.
- Workforce Administration.
- Financial Management.
- Sponsored-Project Financial Management.
- Operational Excellence.
The **Customer Care** team will assist with employment and business-support activities, including:

- Answering general questions about **payroll**, **benefits**, **externally funded awards**, **employment**, **funding information**, **changes to employee accounts**, **I-9 employee processing**, etc.

- Assistance in **making purchases** or **reconciling PCard transactions**.

- Connecting functional experts with customer requests when a request or resolution is outside the scope of the **Customer Care** team.

**Jameeta Lewis**
Director of Customer Care
The Workforce Administration team will manage transactional activities related to the full-employee lifecycle, including:

- Creating requisitions in Taleo, drafting offer letters, pre-screening candidates and overseeing onboarding processes for new employees.
- Administering benefit-enrollment processes.
- Keying information in MAP, such as new positions set-up, assignment changes, supervisor changes and benefits deductions.
- Maintaining employee personnel files.
The Financial Management team will support the review, approval and processing of various financial activities, including:

- Reviewing and approving transactions submitted through Mountaineer Marketplace and MyExpenses.
- Reconciling funds and distributing financial reports.
- Reporting unrecorded assets/liabilities on a quarterly basis.
- Overseeing timecard submissions and working with supervisors to ensure time is submitted and approved.
The Sponsored-Projects Financial Management team will manage post-award transactional financial activities, including:

- Reviewing and approving purchases on externally funded awards.
- Reconciling externally funded awards and distributing monthly reports to principal investigators.
- Processing financial data related to grants (e.g., billing and invoicing of sponsors), reconciling award expenses and initiating cost transfers.
The **Operational Excellence** team will provide accountability to our customers by:

- Monitoring **case submissions** and **resolutions**.
- Reporting **case statistics** to units.
- Reviewing **processes**, **procedures** and **knowledge base** articles on a consistent basis.

*Rich Cortellini*

Director of Operational Excellence
The primary location of the WVU Shared Services Center will be the third floor of One Waterfront Place.

At this location, customers can receive assistance via phone, email, online chat and walk-up support.
WVU SHARED SERVICES CENTER: FACILITIES
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The Shared Services Center storefronets will be located on:

- The ground floor of the Mountainlair.
- The first floor of the National Research Center for Coal and Energy building.
- The ground floor of Health Sciences South.

Initially, faculty and staff located outside of our Morgantown campus will be able to contact the Shared Services Center via phone, email or online chat.

In late spring 2020, WVU Institute of Technology and WVU Potomac State College will operate storefronets out of existing locations that handle business-support functions.
The WVU Shared Services Customer Care Community is a 24/7 online resource with robust search capabilities.

This system is built upon the Salesforce platform and will be used by faculty and staff to submit and track requests (and reference requests after they are resolved).

The Customer Care Community will be accessed via portal.wvu.edu or the WVU Shared Services website (SharedServices.wvu.edu).

For technical support of WVU systems and services, faculty and staff should continue to contact the WVU ITS Service Desk or the HSC ITS Help Desk.
CURRENT ACTIVITIES AND NEXT STEPS

// WVU Shared Services currently is:

// Working with our partner groups to define step-by-step procedures for activities supported by the WVU Shared Services Center.

// Drafting and refining knowledge base articles and testing workflows in the case-management system.

// Completing training activities for internal staff.

Note: Training sessions for the broader WVU community will begin in January and include customer training on using the case-management system and knowledge base.

QUESTIONS?
Visit sharedservices.wvu.edu for more information.

Contact the Shared Services team at sharedservices@mail.wvu.edu 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.