Shifting to a shared services model is a way for participating groups to streamline processes for the faculty, staff and students who use common services. Groups can share resources and expertise across units by forming a team or teams to improve service to all units. The shared services model has the potential to enable the College to increase consistency of information, increase functionality and service to customers, facilitate the management and control of risk. The most tangible benefits will be around processes, people, and technology.

Members:
Connie Brady, Co-Chair
Sherri Nelson, Co-Chair
Melissa Bowers
Sophie Bybee
Danielle McCarville
Bruce McGough
Srithip Prime
Rebeca Silva Rivera
Brian Peterson
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Background
In May 2020 a task force was announced to explore the creation of shared administrative services in the College of Arts and Sciences at the Dean’s direction (see Appendix 1). Following that announcement, a team of nine was put together made up of a combination of CAS faculty, OA staff, classified staff and two members from the Lundquist College of Business. This team proceeded to develop a mission statement, guiding principles and complete needed work leading up to this recommendation.

Mission Statement/Charge
The overall charge for this task force was to provide principles and recommended organizational structures for shared administrative services based on information gathered through listening sessions, research on best practices for shared services, and administrative needs throughout all departments/programs in the College.

Guiding Principles
This process was guided by the following principles:

- Explore multiple points of view
- Maintain a dialogue that is open, honest and respectful
- Be informed by history (including past recommendations, vacancies, lessons learned from currently combined services, economies of scale)
- Create meaningful recommendations grounded in research and evidence that result in actionable steps
- Create and preserve clarity from expectations, roles, and authority
- Create and preserve confidence in processes and systems; achieve outstanding processes; achieve knowledge base and cross training
- Have a lasting impact
- Achieve continuous loop communication between the dean’s office and department/programs in the College.

Work Completed

- Review of best practices and case studies.
  - UBER Making the Case for Shared Services
  - EAB Shared-Services Compendium
  - BAF Shared-Services Primer
  - University Shared Services Case Studies (Prepared by the University of Washington)
  - WACUBO Shared Services presentation by Jon Marchetta (UO) and Megan Glide Villasensor (UC Davis)
- Review of past recommendations/reports.
  - 2017 CAS Task Force Executive Summary
• Collected initial transactional information (more data collection will be done in next phase).
• Reviewed/analysed all position descriptions to inform possible shared service areas.
  ✓ Task Analysis included:
    ▪ Over 175 Position Descriptions Analyzed
    ▪ 3,257 Tasks broken down into main categories and then subcategories
    ▪ Committee members then analyzed two main categories (HR and finance) to determine if task completion is viable under a shared service model
    ▪ Human Resources was broken down into four subcategories and each subcategory was then broken down into tasks
      • Personnel Contracts (43 tasks)
      • Payroll (77 tasks)
      • Wage Reports (32 tasks)
      • Hiring (55 tasks)
      ▪ Out of 207 tasks categorized under Human Resources, the committee determined that only 16% were not envisioned as compatible with shared-services
    ▪ Fiscal was broken down into six subcategories and each subcategory was then broken down into tasks
      • Accounting (33 tasks)
      • Payroll (18 tasks)
      • Travel (58 tasks)
      • Budget (179 tasks)
      • Purchasing (54 tasks)
      • PCard (32 tasks)
      ▪ Out of the 374 tasks categorized under Fiscal, the committee determined that less than 5% were not envisioned as compatible with shared-services
• Developed survey to engage staff and learn what they see as opportunities, challenges in their positions, tasks that are suited for shared services, future engagement in the process (see Appendix 3 for a summary).
• Developed a faculty survey (see Appendix 4 for a summary).
• Launched a website (https://blogs.uoregon.edu/casharedservices/) to keep people informed on the progress and to allow sharing of thoughts/ideas/questions.
• Held six listening sessions. Three with unit managers and three open to all OA and classified staff (see Appendix 2 for a summary).
• Held an additional four town halls to discuss draft recommendations before submitting to the Dean (see Appendix 5 for a summary).
• Held one final meeting with unit managers that included the Dean (see Appendix 6 for a summary).
• Collected anonymous feedback regarding the proposed structure (see Appendix 7 for a summary of these comments).

Feedback
As shown above, the task force used different tools to collect feedback: surveys, comment boxes, and 11 separate meetings. In general, the feedback received was not tied to the structure of shared services as much as it was to the underlying reasons for such an initiative. Overall, staff had good ideas around what work could be a part of a shared-services environment and seemed open to the idea, although several negative themes clouded the discussions and must be taken into consideration immediately upon project launch. Messaging around the final decision made by the dean, the selection process around the steering committee to lead an implementation team, the buildout of the subgroups of the implementation team, and an estimated timeline should be put into place. While it may be difficult to publish a full timeline, the first 120-180 days should be possible.

Change management is going to be a critical function of the implementation team and it is important that the team understand some of the themes that came out of the feedback in terms of culture/climate within CAS as follows.

1. The inherent lack of trust within the College of Arts and Sciences in terms of staff and the leadership team.
2. The fear that “transparency” is just a buzz word and that a decision was already made prior to the task force being put together.
3. The fear this is really about reducing the employment force within CAS.
4. CAS leadership doesn’t fully understand the work being done in the unit and taking managers/staff out of the unit, will result in severe loss of service to the departments rather than a gain.
5. An overall theme of “if it’s not broke, don’t fix it” attitude.
6. Changes to the current culture and restructuring of units, whether at the Academic/Administrative Service Unit (ASU) or Shared Service Center (SSC) level, are difficult.

Conclusion
In conclusion, even with the concerns expressed above, moving to a shared-service structure within CAS, is viable and would reduce risk and increase efficiency around standard work that should be completed in consistent ways. It would also create space to complete mission critical work at the unit levels and provide the college with opportunities to align workflows, and staff roles, to strengthen support for students and the student experience.

There are common themes throughout all the information collected that point to fiscal services and human resources being the two areas to start with. Support within the departments/
programs, in particular student-facing activities, is critical and must be maintained at a department/unit level.

**Recommended Structure**

The task force is recommending a combined structure which includes a centralized shared service center (Exhibit 1) and academic/administrative service units (Exhibit 2). Further recommendations are also made under the **Implementation** section of this document. These two structures were built with the following goals in mind:

- **Build a structure to ensure that consistent application of business processes/practices are in place for the following services:**
  - Fiscal (including but not limited to procurement, payables, travel, operations)
  - Human Resources (including but not limited to payroll, hiring, onboarding, visas)
  - Research Support

- **Create Administrative Support Units (hubs) for connection to departments/programs and main Shared Service Center.**
  - The ASU supports unit specific work that cannot be supported at the shared service level
  - ASUs will be organized by division and there may be more than one per division. Examples of current ASUs are: Econ/Soc; Humanities Consortium, OCIAS/English
  - The Department/Unit, the ASU and the SSC must work in partnership
  - The ASU is led by a manager with a team of support staff
  - The manager of each ASU is the main client for shared services and reports to the Administrative Services Director
  - Decision-making authority remains with the department/unit
  - Number and roles of FTE to be determined through careful analysis

- **Maintain a level of connection to departments/programs providing more unit specific support.**

- **Build a structure that allows professional growth and training opportunities for staff.**

**Advantages and disadvantages/risks**

There are advantages and disadvantages to the overall plan, as well as the two specific structural recommendations. These are broken down on the following tables.

**RECOMMENDED: Central Shared Service Center (SSC) for fiscal, human resources, and research support.** As shown on Exhibit 1, the SSC would report into the Dean’s Office and is based on a common structure found at other universities. The FTE and number of positions are yet to be determined and would be part of the role of the implementation team.
Advantages | Disadvantages/Risks
---|---
Potential for significant efficiency savings due to economies of scale and ability to implement consistent business practices. | Even with central shared services model, shadow structures may emerge in departments in order to initiate transactions; this could lead to inefficiencies.

Allows shared services teams to be staffed with professionals focused on particular functions and ensures that teams are managed by subject matter experts in each area. | If budgeting/HR is all done from a central service center, central services staff physically left in particular units may be perceived as “department staff” rather than shared service staff (creates tension for staff).

Provides more opportunities for advancement for professional staff within their respective fields. | Faculty perception and/or scrutiny that service is diminished, cumbersome, or delayed when there is a change in how much is performed at the department level.

Will lead to more consistently enforced policies and procedures as staff feel less “local” pressure to push through potentially inappropriate transactions. | Lack of well-defined key performance indicators may create accountability/responsibility issues between the ASU and SSC.

Provide efficiency to the University and the College through reducing risk and lessening operational burden on the units. | Creates space to support mission critical work at the unit levels.

RECOMMENDED: Creation of academic/administrative service units (by division) to support unit specific work and to be the lead client for shared services. Academic Support Unit managers would report into Administrative Director(s) that report to the Dean’s Office. These ASUs, similar to those already in place in Economics/Sociology and OCIAS/English and the Humanities Consortium would be designed to maintain unit specific work at the department/program level. As shown on Exhibit 2, ASUs can be designed to fit department/unit level needs and can look different due to size/complexity. This would need to be fully analyzed during the implementation stage, however, there are opportunities to move quickly into some ASUs in the College (the new school or possible expansion of one or both of the existing ASUs and begin testing some general concepts around workflow).

Advantages | Disadvantages/Risks
---|---
Removes performance management of managers/staff from rotating faculty/department heads. | Risk of lack of role clarity between central shared service center and administrative service units.
### Advantages

- Professional training and development for staff could be streamlined and better delivered.
- Allows staff to maintain academic areas of expertise as they relate to their function and maintain relationships with specified units/divisions and mitigate cultural/communication/political risk.
- Ensures faculty that business needs are not taking precedence over academic needs.
- Creates space for mission critical work.

### Disadvantages/Risks

- Removing department/unit head from the evaluation process for managers/staff.
- Staff concerns around classification and workload about being asked to serve more units in a combined ASU that is multi-program or department.

### OVERALL PLAN

The overall plan presents many advantages but the key to success will be the implementation as discussed in the next section. A strong implementation team (steering committee and subcommittees) will need dedicated time and space to complete their work. Many of the disadvantages/risks associated with moving forward are tied to communication and ensuring that effective change management is put into place.

The following illustrates the flow of work done at each level – the department/unit, the ASU and the SSC.

- **Focus is on student instruction, research and service as it ties to the strategic vision of the unit, college and university. Department heads, along with faculty, drive academic decisions such as curriculum, faculty hires, sabbatical decisions, scheduling and overall oversight of the department/unit.**
- **Focus is on work that is not completed within the SSC. Includes tasks to support the department head, faculty and the overall department/unit, college and university’s strategic vision including but not limited to student experience. Depending on size and complexity could serve one or multiple departments/units. The manager for the ASU is the lead client for the SSC to ensure work is being completed.**
- **Focus in on operational work that is common in a shared service environment. The two areas for this proposal are fiscal and human resources.**

---

<table>
<thead>
<tr>
<th>Department/Unit</th>
<th>Academic/Administrative Service Unit (ASU)</th>
<th>Shared Service Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advantages</td>
<td>Disadvantages/Risks</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Potential for greatest efficiency savings due to economies of scale and ability to implement consistent business practices.</td>
<td>Implementation requires time, financial resources and change to current organizational structures, budgets, practices and procedures.</td>
<td></td>
</tr>
<tr>
<td>Would provide departments/programs with more flexibility to respond to major issues and initiatives.</td>
<td>There may be space challenges if staff need to be pulled together in one location due to any space savings likely being dispersed and hard to utilize effectively.</td>
<td></td>
</tr>
<tr>
<td>Provides opportunities for advancement for professional staff.</td>
<td>Some employees may prefer to be in a job with more diverse job duties, serving a single unit, instead of specializing; the transition to this model could lead to decreased job satisfaction and staffing turnover.</td>
<td></td>
</tr>
<tr>
<td>Could lead to increased job satisfaction for staff of being part of a team of people with similar job duties and experience who can easily collaborate on tough issues. Also, would allow for additional opportunities for flexible work and/or telecommuting positions.</td>
<td>Risk of transactional work being moved too far away from departments, causing communications and business risk (e.g., lack of local knowledge specific to an academic unit could create unintended negative consequences in a business transaction).</td>
<td></td>
</tr>
<tr>
<td>With clearly defined roles, there could be improved communication between academic/administrative service units and SSC.</td>
<td>Risk of negative impact on operations if we do not assign the right staff to manage the ASU(s). Currently individual personnel issues or even individual mediocre performance have a more limited impact due to the decentralized nature of operations.</td>
<td></td>
</tr>
<tr>
<td>Preserves college’s ability to be nimble when organizational change occurs (i.e., SSC and ASUs easier to manage through change than functions in dispersed departments/programs).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Re-structuring provides opportunity for addressing current institutional inequities and problematic culture.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ASU Managers would report to Administrative Services Director(s) and be lead clients for the SSC.

Exhibit 1: Proposed Shared Service Structure for the College of Arts and Sciences
**Exhibit 2: Proposed Academic/Administrative Service Units**

Depending on size and complexity an ASU could be designed in several ways. Two examples would be:

**Single Department/Program ASU**

- **Head, Faculty, GEs & Students in Department/Program A**
- **ASU Manager**
- **Staff**

**Multi Department/Program ASU**

- **Head, Faculty, GEs & Students in Department/Program B**
- **ASU Manager**
- **Staff**
- **Head, Faculty, GEs & Students in Department/Program C**

**Key:**
- **Blue line** Reporting line/Formal supervisor
- **Gray line** Relationship line/Not supervisory
Implementation

The task force has developed a comprehensive set of actionable recommendations for how the College of Arts and Sciences can better acknowledge administrative needs in a way that is forthcoming, accurate and beneficial for the entire College. It will be important to ramp up leadership around implementation and set guiding principles to support employees and culture throughout. The following information is also the beginning of a communication plan around what and how things would happen and setting the stage for the work to be completed. This document should be shared with all members of the implementation team once it is formed.

It is very clear from the research that shared service center (SSC) projects involve many functional areas and often take several years to complete. Following are the recommendations of the task force in priority order:

1) Develop a Director of Shared Services position description and request exception to hire immediately.
2) Define the reporting structure for the Shared Service Center.
3) Create a project team structure (see Exhibit 3).
   a. The Steering Committee, once selected, should meet with the task force members to go through the work completed and to share thoughts for moving forward, including input on the structure of the implementation team subgroups.
4) Break implementation down into five phases.

Director of Shared Services

It is critical that this person be on the team for implementation as close to the beginning as possible. The benefits to moving quickly on this hire are:

- Personnel who know they will be living with the consequences of the process and organization design will be even more motivated to anticipate future problems and consider implementation issues.
- The SSC director will manage the SSC on a daily basis and greatly influence its values, culture and service orientation.
- Based on research, the recommended characteristics to look for in an SSC director include:
  o Knowledge of how to manage vision and purpose.
  o Big picture perspective.
  o Strategic agility.
  o Commitment to customer service and total quality management.
  o Ability to handle an environment of constant change.
  o Managerial courage.
  o Good decision maker.
  o Political adeptness and entrepreneurial qualities.
- Excellent interpersonal skills.
- Experience with shared services implementation.
- A commitment to promoting and enhancing diversity, equity and inclusion.

**Reporting Structure for the SSC**

As shown on Exhibit 1, currently the SSC is reporting into Executive Management and that role has not been identified by the task force. It would make sense for the SSC to be reporting into the Dean’s area, however, this is a Dean decision and not in the purview of this committee.

**Project Team**

Getting the right quantity and quality of people to work on the project is likely to be the biggest challenge due to many different workstreams that need to be managed concurrently. The first step would be developing the charge for the steering committee and selecting the members. This committee oversees the project and bears ultimate responsibility for its success. General guidance for the steering committee would be that it has 3-5 members and those members have expertise in the areas of the subgroups (process, change management, shared-services, HR, and the management/operations of an ASU).

Each subgroup should have a mix of CAS community members and the lead of each committee should also have expertise in the area the team will be focused on (the newly hired Director of Shared Services would lead the SSC team; others would need to be selected). The steering committee should determine a selection process for the members of the subgroups. For some subgroups, it may make sense to have an outside member, for example, the HR/Position Team could have a member from central HR and/or SEIU, or the Change Management Team could have a member from the Division of Equity and Inclusion. Subgroups should have 3-5 members.

Project management and support will also be critical. For all roles, it will be important to dedicate FTE which means that balancing membership on one of these groups with other duties will need to be analyzed and, in some cases, work may need to be shifted or reassigned to ensure enough time can be dedicated to this work.

Steering committee responsibilities include:

1) Bears ultimate responsibility for the implementation of the Shared Service Center.
2) Specific responsibilities include but are not limited to:
   a. Providing overall project direction and guidelines by ensuring alignment with objectives and strategy.
   b. Act as a focal point for issues concerning the project and areas of responsibility and influence and ensure that these are dealt with effectively by the project team.
   c. Support and lead the project actively and visibly within the college.
   d. Providing a system for the resolution of issues.
e. Managing critical relationships with stakeholders  
f. Making scope, timescale and resource decisions to support the effective implementation of the Shared Service Center.  
g. Define processes and structures that will actively promote a positive work culture in the new Shared Service Unit and ASUs that uphold university commitments to diversity, equity, and inclusion.  
h. Develop transparent decision-making process and robust system to communicate progress to wider CAS community.  

**Exhibit 3 – Project Team Structure**

![Project Team Structure Diagram]

**Project Phases**

To begin implementation, the project should be broken down into five phases as stated below. Steps that are recommended to be included in each phase (not limited to) follow. Once the team structure is set, things may be revised or added.

1) Phase I – Define a clear framework  
2) Phase II – Develop a comprehensive plan (includes initiating change)  
3) Phase III – Build and test  
4) Phase IV – Implement and roll out  
5) Phase V – Optimization

**Phase I – Define a clear framework**

- With the steering committee selected, complete the buildout of the project structure and team, ensuring that responsibilities are clearly defined.
- Now that the recommendation has been made to move fiscal and human resource functions to a more centralized center, complete careful analysis of what functions need
to remain close to departments/programs and which ones can be standardized and provided through the service center (see Appendix 9 for samples from the University of Kansas).

- Analyze new organizational structure based on structures and functions, not skill sets of current people, related to training, policies, practices and workflow. Developing clear accountability systems will be critical to changing behavior.
- Develop clear accountability structure between shared services operations and client departments/programs (e.g., steering committee, quarterly meetings, other structure)
- Develop a clear engagement plan for input throughout the process/stages.

Phase II – Develop a comprehensive plan

- Define key milestones, activities and interdependencies first then progress to detailed activities, timings and resources. In the early stages, it is most important to have a high-level view which is easily communicated; from there, you can progress to a detailed project plan.
  - Clear accountability will be critical
- Manage risk:
  - Identify the relevant risks, clearly understanding impacts to end users
  - Assess the impact of the identified risks on the project
  - Monitor risk on an ongoing basis
  - Act to avoid or mitigate risk.
  - Develop a risk register (see Exhibit 4 for an example)
- Process design including preparing business continuity strategy and plan.
- Measure benefits. Key success factors should be designed for both quantitative and qualitative benefits (although the latter is harder to assess).
- Initiate Change. Develop a comprehensive plan to support staff throughout the changes and to ensure that the project retains a balanced emphasis on the people aspects alongside those of process. Key activities for the change team:
  - Focus on critical success factors
    - Articulation of a clear vision
    - Assessment of effectiveness at changing (current state)
    - Develop a plan with adequate resources and infrastructure
    - Implement a two-way approach to communication
    - Align performance management and HR
    - Prepare leaders for change
    - Understand, and be sensitive to, the culture (climate)
  - Identify and engage stakeholders and communicate change
  - Use change as a positive force
- Ensure constant messaging/updating around project is being completed.
- Location Analysis
✓ Develop Service level agreements (SLAs)/performance measures
✓ Develop governance structure (guidelines and/or principles)

**Exhibit 4 – Sample Risk Register**

<table>
<thead>
<tr>
<th>Risk</th>
<th>Likelihood</th>
<th>Impact</th>
<th>Mitigation</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational buy-in is not achieved</td>
<td>High</td>
<td>High</td>
<td>Coordinated change strategy to communicate, facilitate change and motivate staff.</td>
<td>Change team</td>
</tr>
<tr>
<td>SSC director is not on board soon enough</td>
<td>Low</td>
<td>High</td>
<td>Initiating recruitment ASAP.</td>
<td>Assistant Dean</td>
</tr>
</tbody>
</table>

**Phase III – Build and test**
✓ Create detailed process maps.
✓ Create opportunities for employees through surveys and expression of interest system (see Appendix 8 for a sample used by Ohio State University).
✓ Assess training needs and develop strategy for delivery.
✓ Select some pilot areas such as expanding the combined Economics/Sociology group to be a larger ASU, or the new school of Global Studies.
✓ Implement physical infrastructure.

**Phase IV – Implement and roll out**
✓ Develop a clear transition roadmap.
✓ Manage people and change.
✓ Knowledge transfer.
✓ Manage transition.
✓ Manage relationships with clients.

**Phase V – Optimization**
✓ Benchmark performance against original plan.
✓ Establish a continuous improvement process.
✓ Expand the SSC scope and footprint.
✓ Establish continuous communication strategy.
✓ Optimize resourcing model.
✓ Motivate and retain employees.
✓ Identify and develop skills of SSC employees.
✓ Update SLAs.
Appendix 1 – Dean’s Initial Announcement

To: 'cas-allemps@lists.uoregon.edu' <cas-allemps@lists.uoregon.edu>
Subject: [Cas-allemps] Shared Administrative Services Taskforce

Dear CAS faculty, staff, and GEs,

I am creating a taskforce to explore the creation of shared administrative services in the College of Arts and Sciences and soliciting nominations for individuals to serve on this taskforce. Our College is already thinly staffed by any measure, so this is not an exercise to downsize. To the contrary, I believe that we can employ our existing staff in ways and rebalance their work portfolios in ways that would provide more consistent services across our departments while leaving our staff feeling less harried and, we hope, more satisfied with their job duties.

Let me give an example. Grant administration (both pre- and post-award) support is infrequently needed by many of our humanities and social science departments. When a faculty member needs such support in these units, the staff often have to reacquaint themselves with the necessary steps to provide such support. This takes considerable time and effort, especially with a service where regulations and processes are often evolving and different from the last time the staff member provided such support. It is very difficult for anyone to provide timely and accurate work in these situations, leading to frustration by the department staff, faculty, and the staff in our central research office who support grant administration across the university. In the past few years, we have created a centralized grant administration service in our dean’s office and effectively handled a significant amount of grant administration for many departments in the humanities and social sciences. This, in turn, protected staff members in leanly staffed offices from spending their scarce time on grants administration.

I believe there are likely many more areas like this that may significantly benefit from a similar shared administrative model. This includes such varied things as travel, human resources, purchasing, international visa support, payables, reporting and reconciliation, event and programming services, and web page maintenance.

There are several reasons why I believe this is a good time to explore this. First, we have successfully piloted a number of small shared administrative services in the College. In addition to the grant administration example above, we also successfully combined administrative staff for Economics and Sociology and for English and the Oregon Consortium of International Area Studies (OCIAS). CASIT was an incredibly successful model of shared administrative services for over a decade in our College, and its model is being used as a primary anchor in the newly centralized IT service developing from the Transform IT process. Second, nearly all the other schools and colleges, as well as the administrative units under the Vice President for Finance and Administration, have successfully developed shared administrative services in recent years. Third, we are currently down about 8-10 staff across our College and are facing a hiring freeze for what I expect will be a significant amount of time. As a result, we are already cobbled together ad-hoc shared administrative services to help units who are down in staff, units that deserve more than a cobbled approach.

Whatever path we choose, it is important that our faculty and students do not feel there is any degradation of service – indeed, we want the opposite! I especially think it is important that the faculty
members and students in a department continue to have key staff who are their conduit to any of their administrative needs. And there are also administrative services that are specific and unique to departments that will obviously need to be administered by staff who understand those local needs.

While I don’t want to create a large taskforce, it will have representation from OAs, classified staff, GEs, and faculty in the College. Their charge will be to listen to various constituent groups in the College and provide principles and recommended organizational structures for shared administrative services in the College based on what they have heard and what experts consider best practices. I would like a final report of recommendations and implementation plans no later than the end of fall term 2020.

I am very pleased to report that Connie Brady, Associate Dean for Finance and Administration in the Lundquist College of Business, and Sherri Nelson, Assistant Dean for Budget in Finance in our College, will co-chair this taskforce. The LCB has long-standing shared administrative services, and Connie led a number of successful efforts to create shared administrative services at her prior institution, Eastern Washington University. Sherri has served the College in her role for many years at the highest level and helped create the successful pilots of shared administrative services in the College noted above.

I want to reiterate that this is not about downsizing staff in our College. With that said, it certainly may lead to rebalancing of tasks and duties for some of our staff members. My hope and intention are this will allow new opportunities for our staff and a chance to better match tasks with their skills and preferences.

Please send any nominations (including self-nominations) of OAs, classified staff, GEs, and faculty for the taskforce to casdean@uoregon.edu by Wednesday, May 20. Thanks for your help, and I look forward to your ideas as the task force gets to work.

Bruce

Bruce Blonigen
Tykeson Dean
Philip H. Knight Professor of Social Science
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Ph: 541-346-4680
Appendix 2 – Listening Session Summary

Four questions were asked:

1. What components of your work make you feel engaged in your position/unit?
2. What work in your academic unit do you feel would be best served by shared-services?
3. What work in your academic unit do you feel is unit-specific and cannot be service by shared-services?
4. What is something you believe has the potential to be overlooked or needs consideration in your unit?

<table>
<thead>
<tr>
<th>1) Engagement</th>
<th>2) Tasks for Shared Services</th>
<th>3) Unit Specific Tasks</th>
<th>4) Overlooked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with students</td>
<td>High risk components</td>
<td>Student facing tasks</td>
<td>Time-sensitive issues</td>
</tr>
<tr>
<td>Camaraderie with staff</td>
<td>Human Resources (hiring personnel, international hires, pay/payroll)</td>
<td>Admissions</td>
<td>Unit culture</td>
</tr>
<tr>
<td>Faculty support</td>
<td>Labor certification</td>
<td>Faculty services</td>
<td>Accountability</td>
</tr>
<tr>
<td>Variety</td>
<td>RFP for contracts</td>
<td>Promotion and Tenure</td>
<td>Burdensome bureaucracy</td>
</tr>
<tr>
<td>Big picture work - not small tasks</td>
<td>Sabbatical/promotion</td>
<td>Scheduling</td>
<td>Loss of connection with faculty, students, mission</td>
</tr>
<tr>
<td>Life-cycle of project</td>
<td>High volume transactions</td>
<td>Advising</td>
<td>Move forward incrementally</td>
</tr>
<tr>
<td>Business analysis</td>
<td>Advertising</td>
<td>Fund/index selection</td>
<td>Consequences for non-compliance</td>
</tr>
<tr>
<td>Travel</td>
<td>Donor relations</td>
<td>Class scheduling</td>
<td>Training</td>
</tr>
<tr>
<td>Individualized support</td>
<td>Onboarding</td>
<td>Curriculum development</td>
<td>Emergency planning</td>
</tr>
<tr>
<td>Committees outside the unit</td>
<td>Travel</td>
<td>Grant coordination</td>
<td></td>
</tr>
<tr>
<td>Culture</td>
<td>Events</td>
<td>Travel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NTTFs, joint appointments</td>
<td>Academic Program support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Employee training</td>
<td>Lab prep</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Facilities cleaning and maintenance</td>
<td>Employee supervision</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contracting</td>
<td>GE administration</td>
<td></td>
</tr>
<tr>
<td>1) Engagement</td>
<td>2) Tasks for Shared Services</td>
<td>3) Unit Specific Tasks</td>
<td>4) Overlooked</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------</td>
<td>------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Marketing and communications</td>
<td>Culture</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiscal tasks (A/P, A/R, reimbursements, scholarship distribution, reconciliations, budget changes)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time entry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchasing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peer reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant coordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduate Student Fellowships</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 3 – Staff Survey Summary

Six questions were asked:

1) What do you see as opportunities in your position?
2) What do you see as challenges in your position?
3) What tasks that you currently perform do you believe are best suited for shared services?
4) Please provide your thoughts around practices that would contribute to shared services and/or task standardization.
5) How would you like to engage in this process in the future?
6) Other comments for the Task Force.

<table>
<thead>
<tr>
<th>1) Opportunities</th>
<th>2) Challenges</th>
<th>3) Current Tasks suited for SS</th>
<th>4) Practices that would contribute to SS</th>
<th>5) Future Engagement</th>
<th>6) Other Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to take on additional tasks outside of PD</td>
<td>Re-learning tasks that are not completed frequently.</td>
<td>Concur/Travel</td>
<td>Shared Service Pod locations/centralized locations</td>
<td>Information sharing, listening sessions, surveys</td>
<td>Curriculum matters should stay within the unit</td>
</tr>
<tr>
<td>Combining multiple similar tasks that are currently separated into two PDs (ex. pre and post award activities)</td>
<td>Disconnect between written policies and the implementation of them. No consequences when broken.</td>
<td>Communications/Website</td>
<td>Transition focused on employee interests, not just CAS needs</td>
<td>Willing to help in any way</td>
<td>Research admin, department admin, and department head need to stay in place.</td>
</tr>
<tr>
<td>Infrequent tasks should be moved to shared services.</td>
<td>Large tasks broken up across departments. (ex. Grants)</td>
<td>Student Supervision</td>
<td>CAS-wide processes and procedures</td>
<td></td>
<td>Direct supervisor is important.</td>
</tr>
<tr>
<td>More in depth work on narrower topics.</td>
<td>Communication of Shared Services changes and how positions and responsibilities are impacted.</td>
<td>Department-level fiscal duties</td>
<td>Focused training and development of community / in-house certification of skills</td>
<td></td>
<td>Focus on value added services and service to support units that have limited staffing</td>
</tr>
<tr>
<td>1) Opportunities</td>
<td>2) Challenges</td>
<td>3) Current Tasks suited for SS</td>
<td>4) Practices that would contribute to SS</td>
<td>5) Future Engagement</td>
<td>6) Other Comments</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------</td>
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<td>------------------</td>
</tr>
<tr>
<td>Customer support for faculty and students. Building relationships.</td>
<td>Administrative reporting to faculty.</td>
<td>Appointments/Calendar management</td>
<td>Task standardization</td>
<td></td>
<td>Accountability standards in shared services need to be the same as in the unit</td>
</tr>
<tr>
<td>Unit specific focus, strategic planning, and continuity.</td>
<td>Workload and the fear that Shared Services will increase, rather than decrease for personnel in units.</td>
<td>International appointments/hiring</td>
<td>Vertically integrated planning tools</td>
<td></td>
<td>Retain culture in units</td>
</tr>
<tr>
<td>Increased specialization and access to processes and data that go beyond the department.</td>
<td>Non-uniformity of positions. Positions with same titles do not do the same work from unit to unit (ex. Office Specialist)</td>
<td>Grant Administration</td>
<td>Department’s to have option of opting in or out of shared services</td>
<td></td>
<td>Communication between SS and units (ex. When tasks are closed in SS, make confirmation notices to unit)</td>
</tr>
</tbody>
</table>

- Lack of training
- Payroll
- Clear expectations
- Onboarding faculty
- Trackable
- Time tracking and entry
- Supply ordering
- Faculty review
- Student Advising
- COGNOS report writing
- Event coordination
Appendix 4 – Faculty Survey Summary

Two questions were asked:

1) Which administrative services require extensive program-specific knowledge. For each service listed, please include a sentence explaining the reason for the listing.
2) Which administrative services require material reliance on live/real-time interactive communications?

<table>
<thead>
<tr>
<th>1. Extensive Program Knowledge</th>
<th>2. Material Reliance on live/real-time interactive comms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Student-facing services</td>
</tr>
<tr>
<td>Student-facing program materials/comms/services</td>
<td>Meeting with Program Head/Director</td>
</tr>
<tr>
<td>Student advising</td>
<td>Attending meetings with program faculty, advising staff, and students</td>
</tr>
<tr>
<td>Program administration (ex. Event planning)</td>
<td>All administrative services</td>
</tr>
<tr>
<td>Admin of UG and G programs</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Scheduling</td>
<td>Mentorship</td>
</tr>
<tr>
<td>Budget actions and planning</td>
<td>Graduate program management</td>
</tr>
<tr>
<td>Promotion and Tenure</td>
<td>Supervising employees</td>
</tr>
<tr>
<td>Admissions</td>
<td>Instructional lab oversight</td>
</tr>
<tr>
<td>Scholarships</td>
<td>Strategic Planning</td>
</tr>
<tr>
<td>CRWR Reading Series</td>
<td>Travel</td>
</tr>
<tr>
<td>Office Reception</td>
<td>HR hiring</td>
</tr>
<tr>
<td>Payroll</td>
<td>Grants</td>
</tr>
<tr>
<td>Multilingual computer programming</td>
<td>Accounts payable</td>
</tr>
<tr>
<td></td>
<td>Time entry</td>
</tr>
<tr>
<td></td>
<td>Course scheduling</td>
</tr>
<tr>
<td></td>
<td>Financial review</td>
</tr>
<tr>
<td></td>
<td>Promotion and Tenure</td>
</tr>
</tbody>
</table>
## Appendix 5 – Town Hall Summary

### Listening Sessions

<table>
<thead>
<tr>
<th>Questions</th>
<th>Negative Comments</th>
<th>Positive Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>How does the current management structure translate to ASU structure?</td>
<td>Difficult to assess plan without having a bigger picture</td>
<td>Appreciate the consideration of staff</td>
</tr>
<tr>
<td>How has student experiences been addressed?</td>
<td>Faculty do not trust the move to Shared Services.</td>
<td>AEl is an example of successful shared service</td>
</tr>
<tr>
<td>Is it a possibility that shared services does not happen?</td>
<td>Staff are unsure about their future, being demoted or fired.</td>
<td></td>
</tr>
<tr>
<td>Will staff be physically relocated?</td>
<td>Accountability and quality of work completed in a shared service center are major concerns.</td>
<td></td>
</tr>
<tr>
<td>What checks will be in place to ensure Shared Services is working?</td>
<td>Afraid of losing family feel of units</td>
<td></td>
</tr>
<tr>
<td>Have department heads said they are willing to no longer be direct supervisors of the dept managers and staff?</td>
<td>Do not understand why this is happening during time of pandemic</td>
<td></td>
</tr>
<tr>
<td>Since the proposal begins with HR and Fiscal services, how will graduate and undergraduate coordinators be addressed?</td>
<td>Shared Services is just data entry</td>
<td></td>
</tr>
<tr>
<td>What is the risk Shared Services is trying to address?</td>
<td>Layout looks like a business</td>
<td></td>
</tr>
<tr>
<td>When budget cuts come will personnel in SS be more vulnerable to layoffs?</td>
<td>No positive case studies on Shared Services</td>
<td></td>
</tr>
<tr>
<td>When will implementation phase begin?</td>
<td>Do not want to share work with other staff</td>
<td></td>
</tr>
<tr>
<td>Will Dean Blonigen approve the plan before implementation?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 6 – Notes from Unit Managers Meeting

Shared Services Meeting with Bruce 3/12/2021

- Folks will keep classification (OA, classified, etc.,)
- Need to think through work duties, job duties may change
- Not meant to lead to cutting of staff
- Long transition period
- SK: Classified staff are concerned about location, extraction from department and their desire to do that; hoping process will be transparent to classified staff. How is union being brought into conversations? Need to talk to details about implementation. Will absolutely involve the union, have to follow their CBA
- MB: As manager talking with classified staff, they don’t want a new supervisor, element of uncertainty with change; strategic about choosing what dept to work with, invested a lot of energy and time in building relationships. How do we shift and not feel like all investments are being abandoned? It’s hard to reconcile. Is this the position I want for the future when it’s not the one I applied for? How do we support employees through this moment of uncertainty?
  - Change always leads to uncertainty and most folks don’t like change
  - Opportunities
  - Possible promotions
  - No magic bullet on how to help people
  - Continuing giving as much information as we can
- A new message is that it’s not ‘if’ it’s how, need to be leaders in this. Hearing this first here.
- Will be announced in April, everyone is being asked to have these conversations and we’ve already had them
- If people need to move on, it’s part of the process and it’s unfortunate
- The more this is stretched out, the more there is uncertainty
- CS: A lot more top down decision making than there previously was. How much autonomy does CAS have? Will Jamie issue guidelines?
  - Jamie will be issuing guidelines
  - We have autonomy, but not enough to ignore campus wide red flags
- MG: Economics – F TEs will not decrease, salaries will not decrease. Current pay will remain the same? Yes
- SK: Breaks of morale in unit due to lack of transparency. Hoping we can learn from past mistakes. Will there be a communications person assigned to this project who is sharing plan info before decisions are made?
- MG: Intentionally applying for the places where they want to be, those units culturally play to strengths. Concern about joining dept that doesn’t accept underrepresented groups of people
  - Areas where dept culture is not the best
  - For some folks, there may not be a change
- Is CAS Dean’s staff part of this process? Yes
- MB: This year has been exhausting, asked so much of staff, asked so much of myself. Very little room to do more. Being asked to do more. When is it ever enough?
  - Need to start asking for hiring freeze exceptions
  - Maybe start building things out during summer
  - Will have to deal with openings, letting those new hires start with shared services
• Have great experts on this. Connie has been through this multiple times. Transform IT was successful, can learn from them.
• Training people
• Fall will be a period of transition, not a great time for introducing new structure. Can’t take it too slow
• Hiring a specific project manager with limited duration would be beneficial and support the managers.
• SS: The way the recommendation is being presented, it feels like unit managers are being cut from the department while still serving them
  o Reporting structures will be considered strongly
Appendix 7 – Summary of Comments regarding Proposed Recommendations collected on website

Three questions were asked:

1) What advantages do you see?
2) What disadvantages do you see?
3) Additional comments/questions?

<table>
<thead>
<tr>
<th>1) Advantages</th>
<th>2) Disadvantages</th>
<th>3) Other Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning for unusual items (i.e. conference planning)</td>
<td>Potential loss of department culture</td>
<td>Confusion on the make-up of ASU</td>
</tr>
<tr>
<td>Outsource bureaucratic processes (i.e. Hiring, purchasing, reimbursements, and travel)</td>
<td>Undermining of faculty governance</td>
<td>Strategic planning and student coordination belong in the unit (i.e. budgeting, curriculum and course scheduling)</td>
</tr>
<tr>
<td>More efficient use of resources</td>
<td>Monotonous workload</td>
<td>Significant turnover due to burnout</td>
</tr>
<tr>
<td>Standardized best practices</td>
<td>Loss of morale</td>
<td>There is no trust with CAS administration</td>
</tr>
<tr>
<td>More employee control (i.e. individual duty scope and career progression)</td>
<td>Reduction of staff</td>
<td>Current shared services (grant support, Tykeson, CASIT) are not effective and requires significant more faculty time and energy</td>
</tr>
<tr>
<td>Help smaller departments with fewer staff</td>
<td>Changes to current team and manager would require staff adaption.</td>
<td>Staff participation is a &quot;waste of everyone's time&quot; as CAS Admin will not listen.</td>
</tr>
<tr>
<td>Provide a buffer against staff turnover, wider exposure in professional relationships, and intentional alignment with the job functions that employees find the most rewarding.</td>
<td>Loss of freedom to figure things out.</td>
<td>Not having any answers for questions on specifics causes anxiety and distrust.</td>
</tr>
<tr>
<td>Removing OA supervision from department heads</td>
<td>Bad timing due to Covid</td>
<td>Will current special arrangements be allowed under Shared Services?</td>
</tr>
<tr>
<td>1) Advantages</td>
<td>2) Disadvantages</td>
<td>3) Other Comments</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Increased focus on unit priorities.</td>
<td>No good reason for change.</td>
<td>Will CAS Admin guarantee no FTE reductions?</td>
</tr>
<tr>
<td></td>
<td>No longer able to have staff complete tasks outside of their job description.</td>
<td>Will there be physical relocation of staff?</td>
</tr>
<tr>
<td></td>
<td>Fear of change.</td>
<td>How will size and complexity be defined and measured when determining ASUs and staffing levels?</td>
</tr>
<tr>
<td></td>
<td>Too many unknowns in the proposal. General lack of details surrounding ASUs and future structure.</td>
<td>What are the business processes/practices that are inconsistent currently, and how much of that inconsistency is based in unit-specific needs?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>What work is considered unit-specific and mission critical?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Can departments opt out of participating in Shared Services? If so, what is the criteria to do so?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Will this project address fix current shared services that are not functioning well? (i.e. GE payroll and IT Service)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Many questions/comments seek details of the implementation plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How will diversity be prioritized in this process?</td>
</tr>
</tbody>
</table>
Appendix 8 – Sample Expression of Interest – Ohio State University
HR SERVICE DELIVERY
Expression of Interest Survey

PAGE 1: INTRODUCTION
As an individual who has been identified as performing HR and Payroll duties, you are invited to indicate your personal career preferences based on Ohio State’s future HR and Payroll model. All employees in a position with an HR or Payroll job code, as well as any that perform at least 25% HR or Payroll duties today, regardless of job code, have been invited to participate.

Please read the information available on the HR Transformation website, Expression of Interest FAQs and HRSD Job Descriptions prior to submitting your form. Consider both your past and current experiences, as well as your interests and skills, as you identify jobs for which you may be interested. The Expression of Interest process is not mandatory and there is an option to decline to participate in the first section of the survey. The Expression of Interest deadline is November 15, 2019. For questions, contact HR-ExpressionOfInterest@osu.edu.

Guidelines for Survey Completion:
- Ensure all completed fields are correct prior to submission, as this unique link can only be submitted once; if you submit and need to make changes, please reach out to HR-ExpressionOfInterest@osu.edu
- Ensure you are familiar with the process by reviewing resources on the HR Transformation website and attending open office hours, offered daily Tuesday, November 12th through Friday, November 15th, prior to submission
- Express interest in jobs based on skills, experience, qualifications and growth interest; you are strongly encouraged to express interest in three jobs
- Provide complete responses that will help to confirm your qualifications and experience as they relate to the requirements for each future state job for which you express interest
- Consider uploading a resume and/or relevant documentation to provide additional context (optional)

PAGE 2: DEMOGRAPHIC INFORMATION
1. First Name (Required)
   a. Single line text entry field
2. Last Name (Required)
   a. Single line text entry field
3. Ohio State Email Address (Required)
   a. Single line text entry field
4. Employee ID (Required)
   a. Single line text entry field
5. Current Ohio State Job Title (Required)
   a. Single line text entry field
6. Current Supervisor Name (First and Last) (Required)
   a. Single line text entry field
7. Current Unit (Required)
   a. Dropdown list:
      i. Athletics
      ii. College of Arts and Sciences
      iii. College of Dentistry
      iv. College of Education and Human Ecology
v. College of Engineering
vi. College of Food, Agricultural, and Environmental Sciences
vii. College of Medicine
viii. College of Nursing
ix. College of Optometry
x. College of Pharmacy
xi. College of Public Health
xii. College of Social Work
xiii. College of Veterinary Medicine
xiv. Comprehensive Cancer Center
xv. Fisher College of Business
xvi. Health Sciences FGP
xvii. Lima Campus
xviii. Mansfield Campus
xix. Marion Campus
xx. Moritz College of Law
xxi. Newark Campus
xxii. Office of Academic Affairs - Administration
xxiii. Office of Academic Affairs - Graduate School
xxiv. Office of Academic Affairs - Office of Diversity and Inclusion
xxv. Office of Academic Affairs - Office of International Affairs
xxvi. Office of Academic Affairs - Office of OCIO
xxvii. Office of Academic Affairs - Office of Research
xxviii. Office of Academic Affairs - Office of Student Academic Success
xxix. Office of Academic Affairs - University Libraries
xxx. Office of Academic Affairs - Wexner Center for the Arts
xxxi. Office of Business and Finance
xxxii. Office of Human Resources
xxxiii. Office of Legal Affairs
xxxiv. Office of Student Life
xxxv. Office of the President
xxxvi. Senior VP Admin & Planning
xxxvii. The John Glenn College of Public Affairs
xxxviii. University Advancement
xxxix. Wexner Medical Center
xl. Other (Please Specify):

8. Do you wish to participate in the Expression of Interest process? (Required)
   a. Yes, I wish to participate.
   b. No, I decline to express interest. By declining to express interest, I acknowledge that I will not be eligible for a future state HR or Payroll job and will be directed to the end of the survey. Before selecting this option, you are highly encouraged to discuss your preference with your supervisor and/or Senior HR Professional.

PAGE 3: EXPERIENCE

1. I have experience in providing HR and/or Payroll services or consultation to: (Select all that apply) (Required)
   a. Core Services (e.g. Administrative Support, Food Service, Custodial)
   b. Executive (e.g. Senior Vice Presidents, Deans)
   c. Faculty (e.g. Researchers, Academic Positions)
   d. Healthcare (e.g. Physicians, Nurses)
e. Professional Staff (e.g. IT, HR, Finance)

2. I have interest in providing HR and/or Payroll services or consultation to: (Select all that apply) (Required)
   a. Core Services (e.g. Administrative Support, Food Service, Custodial)
   b. Executive (e.g. Senior Vice Presidents, Deans)
   c. Faculty (e.g. Researchers, Academic Positions)
   d. Healthcare (e.g. Physicians, Nurses)
   e. Professional Staff (e.g. IT, HR, Finance)

3. I have experience providing HR services in the following functional areas: (Select all that apply) (Required)
   a. Absence Management
   b. Change Management
   c. Compensation
   d. Compliance / Risk Management
   e. Diversity and Inclusion
   f. Employee and Labor Relations
   g. Employee Benefits
   h. Employee Health, Safety and Security
   i. HR Communication
   j. Organizational Culture
   k. Organizational Development
   l. Payroll
   m. Service Support
   n. Talent Acquisition
   o. Talent Management

4. How many years of HR, Payroll or relevant experience do you have? (Required)
   a. Less than one year
   b. 1 year
   c. 2 years
   d. 3 years
   e. 4 years
   f. 5 years
   g. 6 years
   h. 7 years
   i. 8 years
   j. 9 years
   k. 10 years
   l. 11 years
   m. 12 years
   n. Over 12 years

5. What is the highest degree you have received/level of school you have completed? (Required)
   a. High school diploma or equivalent (e.g. GED)
   b. Certification or vocational training
   c. Associate degree
   d. Bachelor’s degree
   e. Advanced degree (e.g. master’s, doctorate)

6. What HR and/or Payroll certifications do you hold? (Required)
   a. Certified Professional in Learning and Performance (CPLP)
   b. Professional in Human Resources (PHR)
   c. Senior Professional in Human Resources (SPHR)
d. SHRM Certified Professional (SHRM-CP)
e. SHRM Senior Certified Professional (SHRM-SCP)
f. Other (Please Specify):
g. Not Applicable

PAGE 4: EXPRESSION OF INTEREST

In the section below, you will indicate your top three career preferences. Please select **three different** roles. If you wish to stay in your same job or in a similar role, you should select that job as your first choice. If you were previously selected for a job and declined the role to express interest, list the job you were offered as your second or third choice. There are free form text fields at the end of each job choice that give you the opportunity to provide additional information and explain your choices. You can also use this as a platform to further explain your overall preferences, such as wanting to continue the same type of work or preferring to stay in your unit. Please read over all the information available on the [HR Transformation website](#) and the [Expression of Interest FAQs](#) prior to submitting your completed form.

1. **Select your first-choice job:** (Required)
   a. Dropdown list of all jobs available for EoI
2. **Why are you interested in and qualified for the first-choice job for which you expressed interest?** (Required)
   a. Essay text box field
3. **Select your second-choice job:** (Optional)
   a. Dropdown list of all jobs available for EoI
4. **Why are you interested in and qualified for the second-choice job for which you expressed interest?** (Optional)
   a. Essay text box field
5. **Select your third-choice job:** (Optional)
   a. Dropdown list of all jobs available for EoI
6. **Why are you interested in and qualified for the third-choice job for which you expressed interest?** (Optional)
   a. Essay text box field
7. **Please indicate additional preferences by selecting one or more of the options below:** (Optional)
   a. I intend to participate in the Future Enterprise Support Team (FEST) expression of interest process. The Future Enterprise Support Team (FEST) will deliver multiple services to the organization related to Workday support. The team will reside as a central support organization in the OCIO and will support the core system functions of Human Resources, Payroll, Finance and Supply Chain across the campus and medical center.
   b. I am interested in continuing non-HR work in my unit. Some individuals may have the opportunity to stay in their current unit with modified duties at the unit’s discretion. However, individuals will not know whether this opportunity exists prior to expressing interest and are still encouraged to express interest in three jobs.
   c. N/A
8. **If expressing interest in a HR Business Partner, HR Consultant and/or Talent Acquisition job, what is your unit preference?** If you have more than one preference, you can list multiple units separated by a semicolon (;). If you do not have a preference, write “N/A.” (Optional)
   a. Single line text entry field
9. **Use the free form text field below to provide any additional context about your choices:** (Optional)
   a. Essay text box field

PAGE 5: ADDITIONAL INFORMATION
1. Upload your resume or additional relevant documentation in PDF format with the following naming convention: “Last Name_First Name”. Note: you will only be able to upload a document in PDF form. (Optional)
   a. Document upload (limited to one document)
2. What are your career goals and aspirations as it relates to your future at Ohio State University and the new HR and Payroll model? (Optional)
   a. Essay text box field
3. You have reached the end of the survey. If you are ready to submit, please select the box below. Otherwise, click the back button to continue working on the survey. (Required)
   a. By selecting this box, I acknowledge that I am submitting my responses and will not be able to make changes.

PAGE 6: END
Thank you for your participation in the Expression of Interest process! For questions, contact HR-ExpressionOfInterest@osu.edu.
Appendix 9 – Sample of Task Breakdown – University of Kansas
# University of Kansas

## Shared Service Centers

### Scope of Services: Human Resources

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Department Responsibility</th>
<th>SSC Responsibility</th>
<th>Human Resources Responsibility</th>
</tr>
</thead>
</table>
| **Recruitment** | • Communicate need to SSC  
• Provide justification for search or recruitment exception  
• Obtain and provide evidence of approval(s) from hierarchy  
• Provide current CV of candidate (recruitment exceptions only)  
• Convene search committee and review applicants  
• Conduct interviews  
• Make initial verbal offer to qualified candidate  
• Notify SSC of the details of the offer  
• Complete certain portions of visa application (international hires) | • Assist with writing position description  
• Facilitate the gathering of information for job  
• Confirm funding with SSC Finance/Research staff  
• Route bundle to HR or IOA  
• Write and post advertisements (if requested)  
• Submit job posting in recruitment system  
• Assist in coordinating interviews (if requested)  
• Submit request for official offer in recruitment system  
• Facilitate visa application (if requested)  
• Provide guidance to department at all points in process | • Final review position description and ad copy, index bundle  
• Designate FLSA  
• Review and approve final posting in recruitment system  
• Notify department and SSC of work authorization needs (visa)  
• Review and post official offer in recruitment system  
• Order background checks  
• Provide guidance to department and SSC at all points in process |
| **Onboarding** | • Check that new hire has completed onboarding process on first day of work  
• Provide workspace set-up, supplies, departmental orientation, and training  
• Watch for payroll notifications in departmental HR inbox | • Send welcome and onboarding instructions to new hire (cc dept)  
• Ensure proper completion of all required new hire docs  
• Initial orientation to campus benefits and services  
• Take photo for ID and provide temp parking pass (if applicable)  
• Route completed onboarding packet to HR for keying | • Finalize hire in recruitment system  
• Notify department of background check outcome  
• Key appointment into HR/Pay system |
<table>
<thead>
<tr>
<th>Process Name</th>
<th>Department Responsibility</th>
<th>SSC Responsibility</th>
<th>Human Resources Responsibility</th>
</tr>
</thead>
</table>
| **Time Review**                  | • Employees key time using appropriate time collection method  
• Managers approve keyed time at the end of each week  
• Notify SSC of missed punches or other issues  
• Delegation                                                                 | • Key missed punches as needed  
• Escalate issues to HR/Pay team when needed  
• Run appropriate reporting each pay period and review for missing or unapproved time  
• Follow up with employees and managers as needed                                                                 | • Run Time Administration  
• Send payroll to State  
• Work with departments and SSC to resolve conflicts and errors                                               |
| **Appointment Maintenance**      | • Notify SSC of renewals, funding changes, FTE changes, resignations, etc.  
• Obtain appropriate approval(s) from hierarchy                                                                                                                   | • Confirm funding with SSC Finance/Research staff  
• Route PAF to effect the changes  
• Key pure funding changes for non-grant funds                                                                                                                | • Key appointment changes into HR/Pay system                                                                 |
| **GTA/GRA/GA Appointments**     | • Complete departmental section of 3G ImageNow form and route forward  
• Provide duties/expectations, workspace set-up, supplies, departmental orientation, and training to new hire                                                                 | • Complete SSC HR sections of 3G ImageNow forms and route forward  
• Prepare contracts/letters and obtain student signatures  
• Provide onboarding (see above) for new and gone longer than 1 year  
• Route completed onboarding packet to HR for keying                                                                 | • Order background checks  
• Notify department of background check outcome  
• Key appointment into HR/Pay system                                                                                                                                  |
| **Collection of USS Performance Management Forms** | • Managers conduct timely evaluations for all employees                                                                                                           | • Notify departments of pending evaluation deadline  
• Review departmental lists to ensure an evaluation has been submitted for each employee  
• Follow up with supervisors as needed                                                                                                                               | • Overall administration and dissemination of the evaluation process  
• Central online collection of USS evaluations                                                                                                                            |
### Travel and Expense

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Department Responsibility</th>
<th>SSC Responsibility</th>
<th>Central Office Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Authorization</td>
<td>• Traveler secures approval and/or funding</td>
<td>• Verify funding source</td>
<td>• Audit Expense Report</td>
</tr>
<tr>
<td></td>
<td>• Traveler provides documentation of approval/funding and travel details</td>
<td>• Setup new Vendor/Proxy as required</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Chair approves Travel Authorization</td>
<td>• Create Travel Authorization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Traveler secures travel bookings</td>
<td>• Assist with travel bookings/purchases (optional)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Traveler provides itemized receipts for reimbursement through currier to scanning and email</td>
<td>• Create travel Expense Report/KUEA Travel Check Request and submit with supporting documentation</td>
<td></td>
</tr>
</tbody>
</table>

### Deposits

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Department Responsibility</th>
<th>SSC Responsibility</th>
<th>Central Office Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted Use funds</td>
<td>• Administrative staff receives cash &amp; prepares deposit slip for 700 funds</td>
<td>• Courier takes deposit to Bursar’s Office</td>
<td>• Bursar’s Office takes deposit to bank.</td>
</tr>
<tr>
<td>KUEA funds</td>
<td>• Administrative staff endorses checks for KUEA with account number</td>
<td>• Keys deposit information into PeopleSoft</td>
<td></td>
</tr>
<tr>
<td>Recovery of expenditure</td>
<td>• Administrative staff prepares KUEA Deposit Form and takes check to KUEA (optional)</td>
<td>• Prepares KUEA Deposit Form and takes deposit to KUEA (optional)</td>
<td>Note: KUCR receives and posts all deposits related to sponsored projects.</td>
</tr>
<tr>
<td>(credit back to original purchase)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Name</td>
<td>Department Responsibility</td>
<td>SSC Responsibility</td>
<td>Central Office Responsibility</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Candidate Support/Honorarium Processing** | • Arrange travel and accommodations (optional)  
• Have candidate/guest complete forms (W-9, Contractual Services Form)  
• Send documentation to SSC (completed forms, itemized receipts & itinerary or announcement) | • Assist with travel arrangements and accommodations (optional)  
• Verify funding source and completeness of documentation  
• Process KUPPS check request and submit for guest  
• Forward complete documentation to CLAS Budget Office for candidate | • CLAS Budget Office will complete reimbursement for Candidate |
| **Tuition and Scholarship Support** | • Determine awards  
• Provide awardee information to SSC (awardee name, amount, account, term of award)  
• Send award notifications (optional) | • Provide department with KUEA funding projections  
• Complete scholarship forms  
• Send award notifications (optional) | • Admissions & Scholarships will post awards to student accounts |
| **Procurement** | • Initiate order directly or complete purchase (optional)  
• Determine funding source for purchase (optional)  
• Receive purchased items  
• Send invoice and/or receipt to SSC for payment | • Receive notification from department for purchase and finalize funding source  
• Complete purchase (optional)  
• Initiate payment and submit supporting documentation  
• Conduct initial audit for allowability | • Conduct an audit using random sampling or established thresholds according to university, state, federal, and/or sponsor guidelines |

- KUPPS Catalog orders
- KUPPS Non-Catalog orders
- KUPPS Check Requests
- P-Card
- Bids
- FO
- KUEA
<table>
<thead>
<tr>
<th>Process Name</th>
<th>Department Responsibility</th>
<th>SSC Responsibility</th>
<th>Central Office Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing and Receivables</td>
<td>To be determined after review with needs of departments in Social &amp; Behavioral Science departments</td>
<td>• Generate invoices (optional)</td>
<td>• Generate invoices (optional)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Collect revenue and mark invoices as received (optional)</td>
<td>• Collect revenue and prepare deposit slips (optional)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Monitor outstanding receivables</td>
<td>• Monitor outstanding receivables</td>
</tr>
<tr>
<td>Financial Reporting</td>
<td>• Determine the financial information needed and frequency desired</td>
<td>• Provide Financial reports as requested by department</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>