CAS Shared Services Update

1/12/2022
Purpose of Today’s Presentation

• Review main objectives
• Committee Overview
• Review the purpose of the Academic Service Unit (ASU) and its connections to the department/unit and the Shared Service Center (SSC).
• Review the opportunities/challenges of the ASU.
• Present the proposed structure/organization of the Academic Service Units (ASUs) and their departmental groupings.
  • The SSC will be discussed at the next DH/Manager Meeting.
• Receive initial feedback and answer general questions.
Main Objectives

• Everyone has a position
  • Available training
  • Professional growth opportunities
  • Solid, supportive structure for employees to succeed

• Increased services
  • Cross training and back-up

• Efficiency
  • University best business practices
  • Reduce risk

• Value-added services
  • More space for student services and strategic management in a department/unit
Committee Overview

**Process**
What the work is

**HR**
Who does the work

**ASU/SSC**
How the work is done

**Change Management**
How it is all communicated
The Relationship

**Department/Unit**
Focus is on student instruction, research and service as it ties to the strategic vision of the unit, college, and university. Department heads and faculty drive academic decisions such as curriculum, faculty hires, sabbatical decisions, scheduling, and overall oversight of the department/unit.

**Academic Service Unit (ASU)**
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. Will serve multiple departments/units. The associate director for the ASU is the lead client for the SSC to ensure work is being completed.

**Shared Service Center**
Focus is on operational work that is common in a shared service environment.
Sample work (list in not all inclusive)

- Academic Service Unit
  - Strategic partnership with the department/unit head
  - Promotion/Tenure/Reviews
  - General faculty support
  - Budget management
  - Undergraduate program support
  - Graduate program support
  - GE Management

- Shared Service Center
  - Financial Tasks
    - Invoice Payments
    - Contracting
    - Purchasing
    - Reimbursements
    - Report generation
  - Human Resources
    - General HR Paperwork
    - MyTrack Actions
    - Onboarding
  - Grants
    - General administration
## Sample Process

<table>
<thead>
<tr>
<th>Process Name</th>
<th>ASU Resp.</th>
<th>SSC Resp.</th>
<th>CAS</th>
<th>Reasoning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Payments</td>
<td>• Receive invoices</td>
<td>• Vendor setup</td>
<td>N/A</td>
<td>ASU has budget authority and understands unit needs, yet invoice payment is transactional and having separation of duties reduces risk.</td>
</tr>
<tr>
<td>(Stateside and UOF)</td>
<td>• Verify receipt of goods/services</td>
<td>• Determine commodity/account codes</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Approve for payment (allowable expense, etc..)</td>
<td>• Input into Banner for payment</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Identify funding source (index, activity, UOF second reference code, etc...)</td>
<td>• Issue credit memos; documentation/records retention</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Identify business purpose</td>
<td>• Tracking payments, lost checks, payment issues resolution, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Send to SSC</td>
<td></td>
<td></td>
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</tbody>
</table>
## ASU Opportunities/Challenges

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>Removes performance management of managers/staff from rotating faculty/department heads.</td>
<td>Risk of lack of role clarity between central shared service center and academic service units.</td>
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<tr>
<td>Professional training and development for staff will be streamlined and more equitably delivered.</td>
<td>Staff concerns about classification and workload (for example, being asked to serve more units in a combined ASU that is multi-program or department).</td>
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<tr>
<td>Allows staff to maintain academic areas of expertise as they relate to their function and maintain relationships with specified units/divisions.</td>
<td>Disruption of familiar “home” and community.</td>
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<td>Ensures faculty that business needs are not taking precedence over academic needs.</td>
<td>Complexities of the transition.</td>
</tr>
<tr>
<td>Creates time for strategic planning and enhanced student services.</td>
<td></td>
</tr>
</tbody>
</table>
Academic Service Unit Structure

Development Guidelines

- Focus on disciplinary and geographic proximity
- Distinct characteristics of units considered
  - GECR support
  - Size of graduate program(s)
  - Size of student population being served
  - Unique offerings
  - Programs (majors, minors, certificates)
- Other Considerations
  - Student to Staff ratio
  - Staff to Faculty ratio
What has not been determined yet?

- Location of ASUs
- Total FTE needs for each ASU
- Mechanisms for placing staff within the structure
- Position descriptions
- Process changes/updates
- Completion of all tasks touched/handled within ASUs vs. Shared Service areas (HR, finance, grants, etc)
Draft Conceptual High-Level Administrative Diagram:
Draft Conceptual Single
ASU Administrative Diagram:
Draft Conceptual ASU Administrative Diagram:

*This reflects changes to administrative support provided to departments/programs only. It does not represent any change to faculty home in an academic department.

ASU UNIT RANGES
TTF: 45-77
Career: 5-81
ProTem: 2-43
SCH: 31,007-94,927
GE: 42-77
Draft Conceptual ASU Administrative Diagram:

*This only impacts administrative alignment to faculty and students and not the departments themselves
Questions?
Next Steps

• Bruce will send an email to the heads and managers with talking points and link to the slides in preparation for the distribution of the all-staff newsletter.

• Weekly newsletters will come out on Fridays with information on the ASUs, FAQs, additional meeting announcements, etc. beginning January 14th.

• First round of open houses for each individual ASU inviting all faculty and staff is being scheduled.

• The PowerPoint presentation will be available on the website.

• The structure for the SSC will be discussed at the next DH/Manager meeting.