



# Streamlining Business Operations Belknap Campus

Shared Services Proposal

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March 2016

# Belknap Campus Shared Services

## Overview

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- Existing State
- Future State Vision
- Development Process
- Shared Services Description & Workflow
- Phase I Processes (2016)
- Phase II Processes (2017)
- Staffing/Organizational Structure
- Communication Plan

## Belknap Campus Shared Services

### Existing State Challenges of Financial & HR Transactions

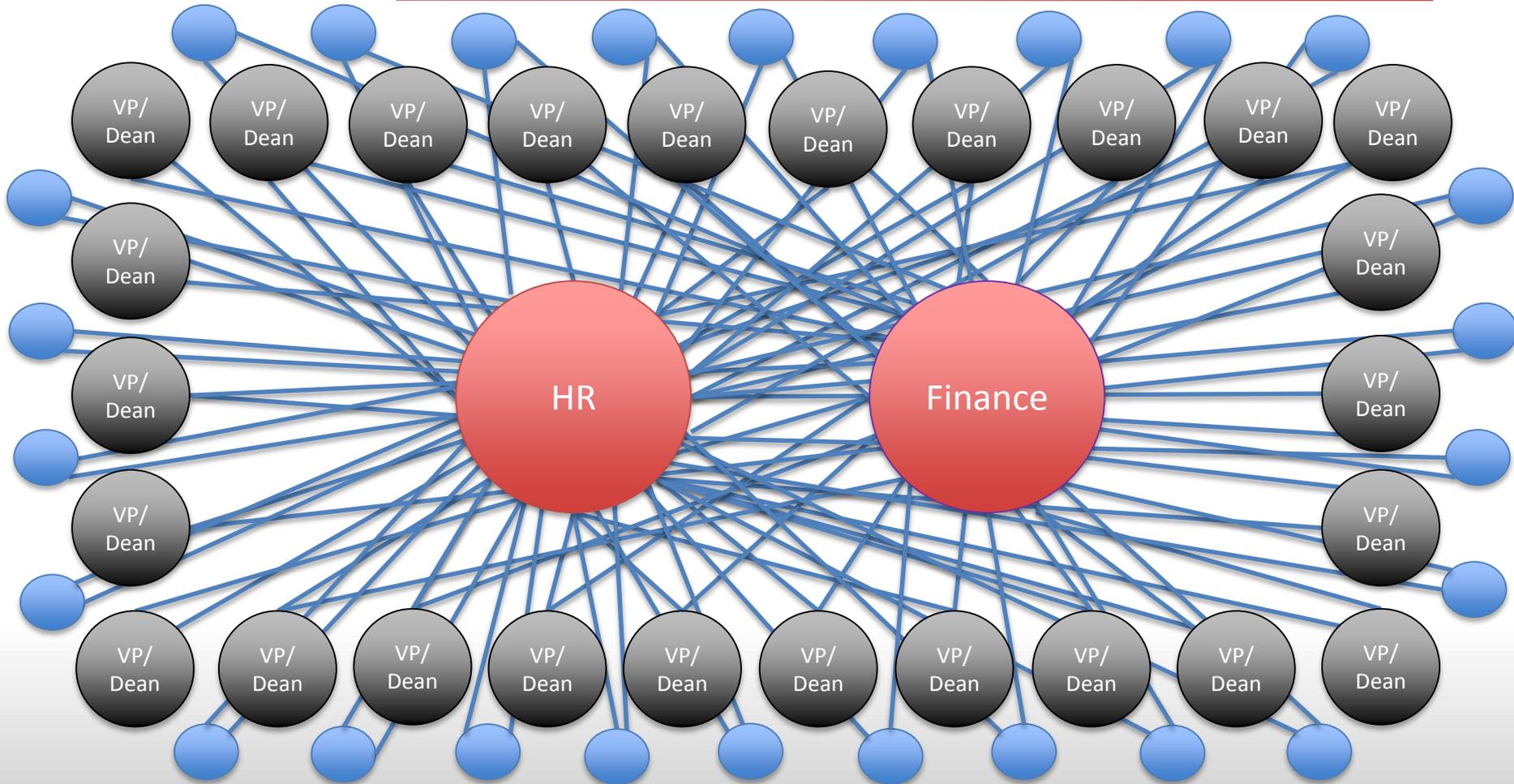


- Do not meet current & future **business needs**
- **Fragmented processes** are complex and confusing; often result in errors and re-work
- **Non-integrated** system applications result in redundancy and manual data re-entry
- **Expensive ERP customizations** do not allow us to leverage new functionality
- Business architecture does not satisfy end user needs; **customer service frustration**



# Belknap Campus Shared Services

## Existing state



# Belknap Campus Shared Services

## Future state vision

Create a **Business Operations Center** focused on the following:



- **customer service**
- **operational excellence**
- **innovative value-added** efficient transactional processes
- **analytics to continually improve** operations

# Belknap Campus Shared Services

## Future state of Financial & HR Transactions

### STREAMLINING BUSINESS OPERATIONS

UNIVERSITY OF  
**LOUISVILLE**



**C**ENTRALIZED OPERATIONS



**A**UTOMATED



**R**ESPONSIVE



**D**ATA-DRIVEN

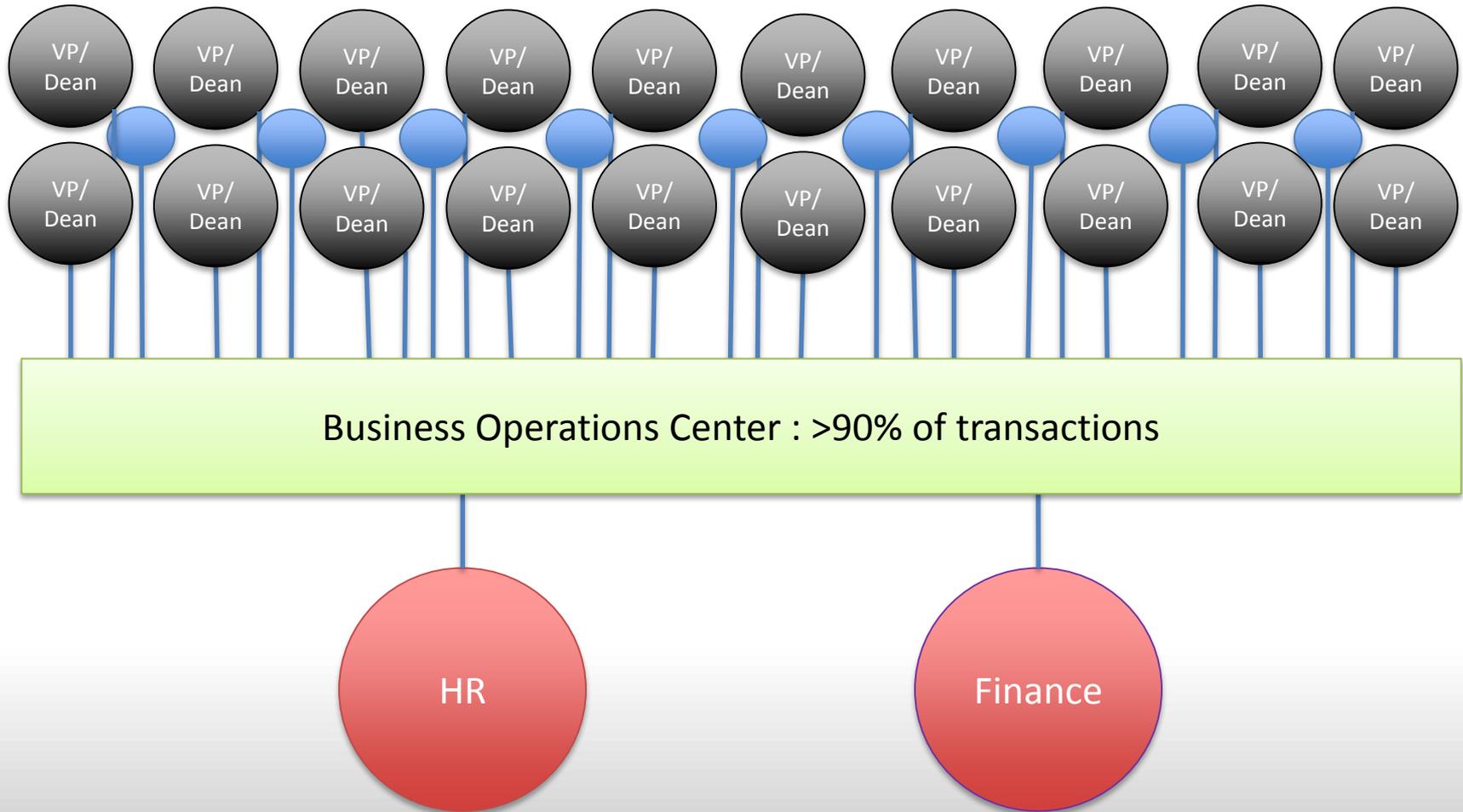


**S**TANDARDIZED & SIMPLIFIED

BELKNAP CAMPUS

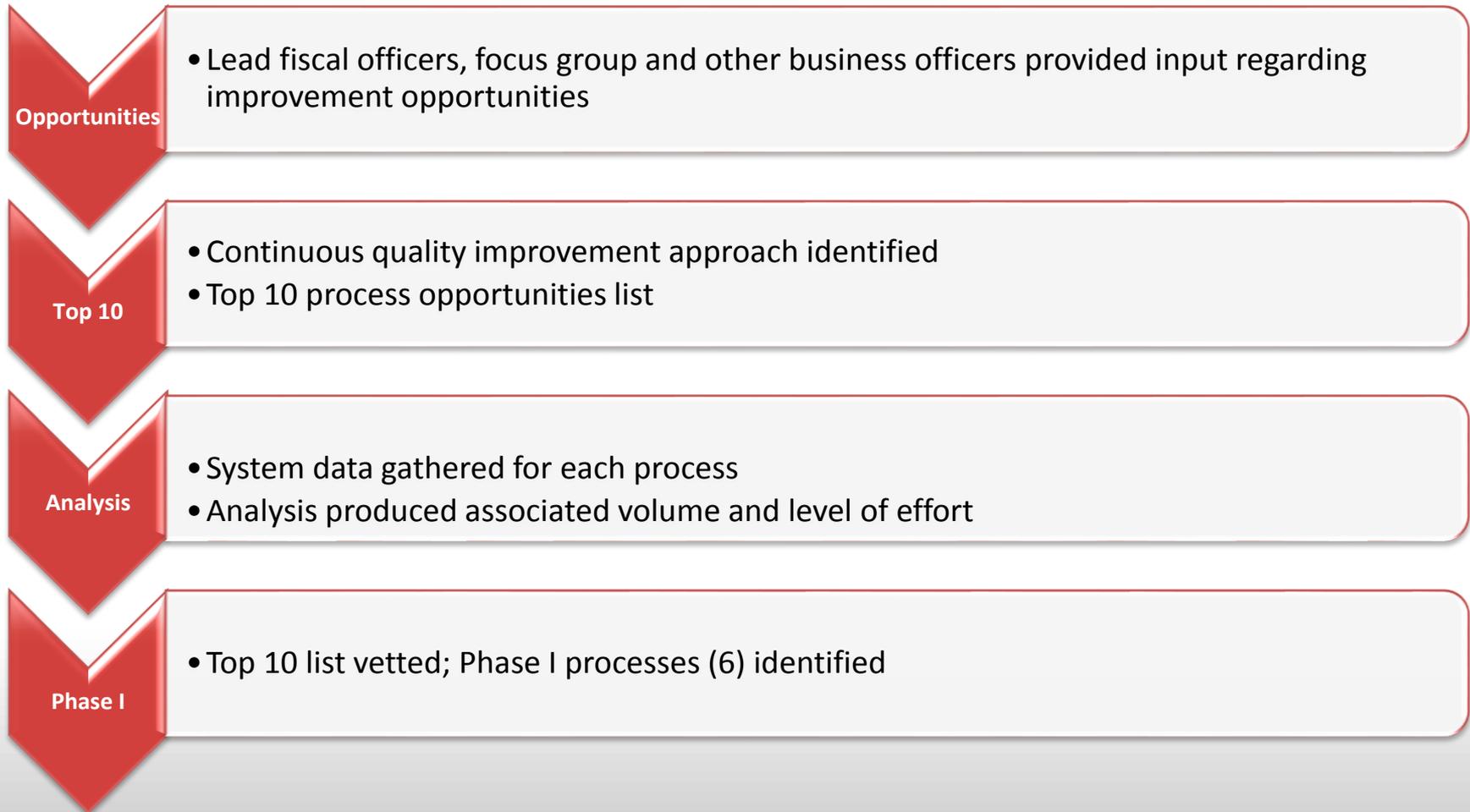
# Belknap Campus Shared Services

## Future State



# Belknap Campus Shared Services

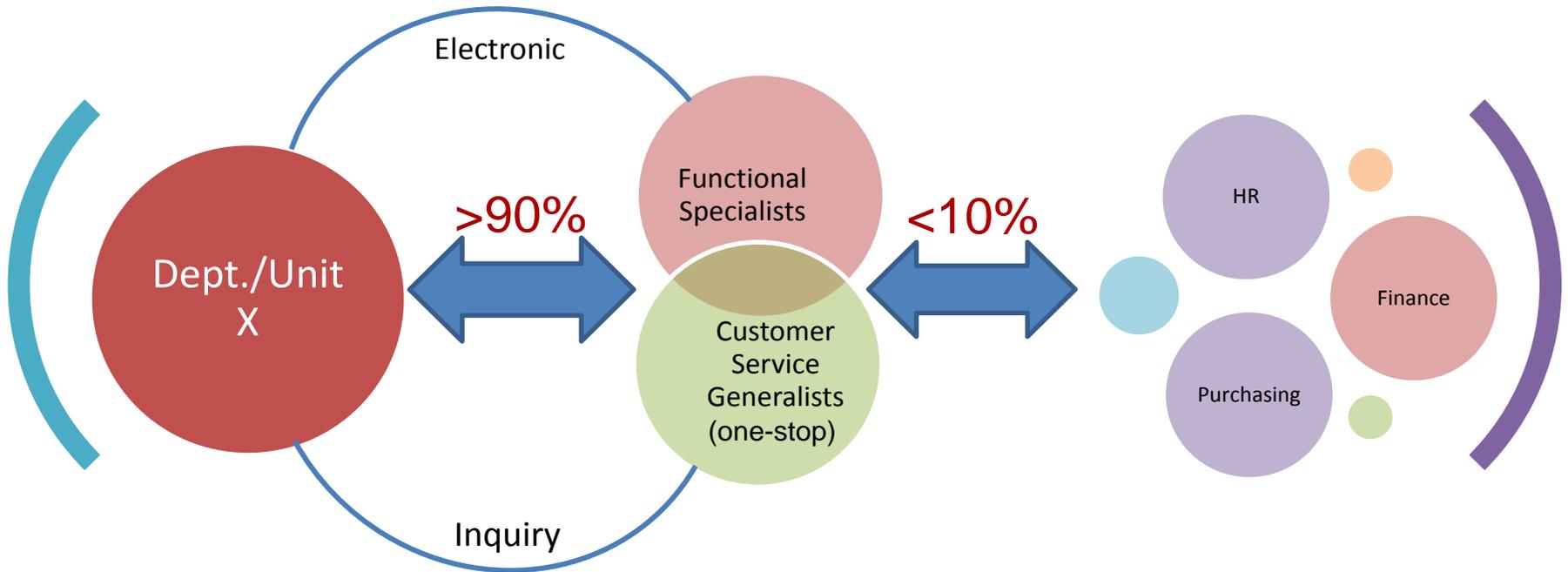
## Future State Development Process





# Belknap Campus Shared Services

## Workflow



### Departments

Interact with the Business Operations unit through electronic processing and personal inquiry.

### Business Operations

Consist of customer service generalists (inquiry) and functional specialists (electronic).

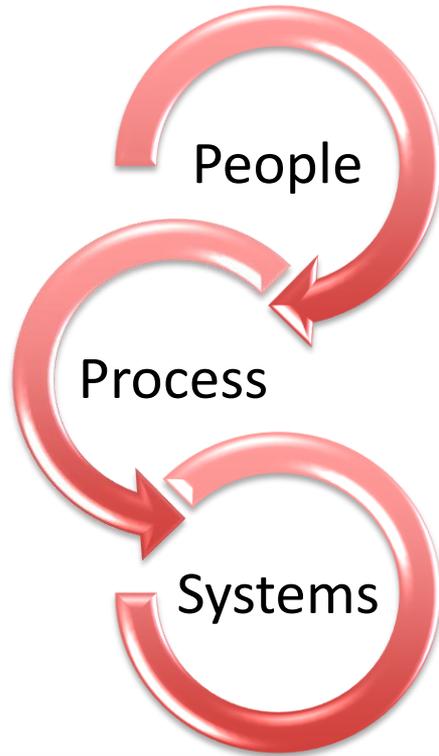
### Central Units

work with Business Operations on specific cases and continuous process improvement.

# Belknap Campus Shared Services

**Phase I – April – December 2016**

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## Transactions

- Over 500,000 transactions
- Identified from top 10 opportunities list

## Processes

1. Onboarding (students, graduate assistants and temporaries)
2. Position maintenance
3. Job changes
4. Additional payments
5. Time reporting
6. Expense transfers (payroll expense transfer, IUTs, journals)

# Business Operations

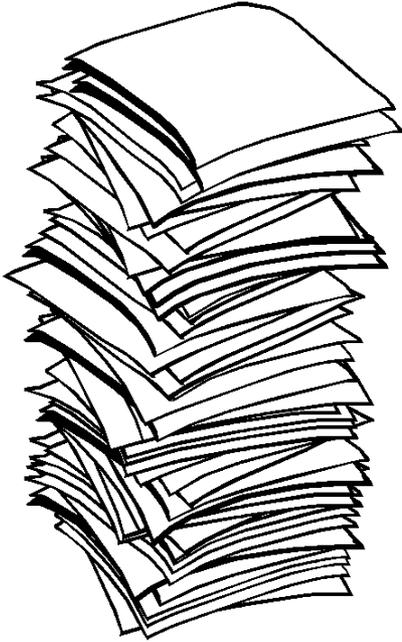
## Phase I timeline

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# Belknap Campus Shared Services

## Onboarding – current state

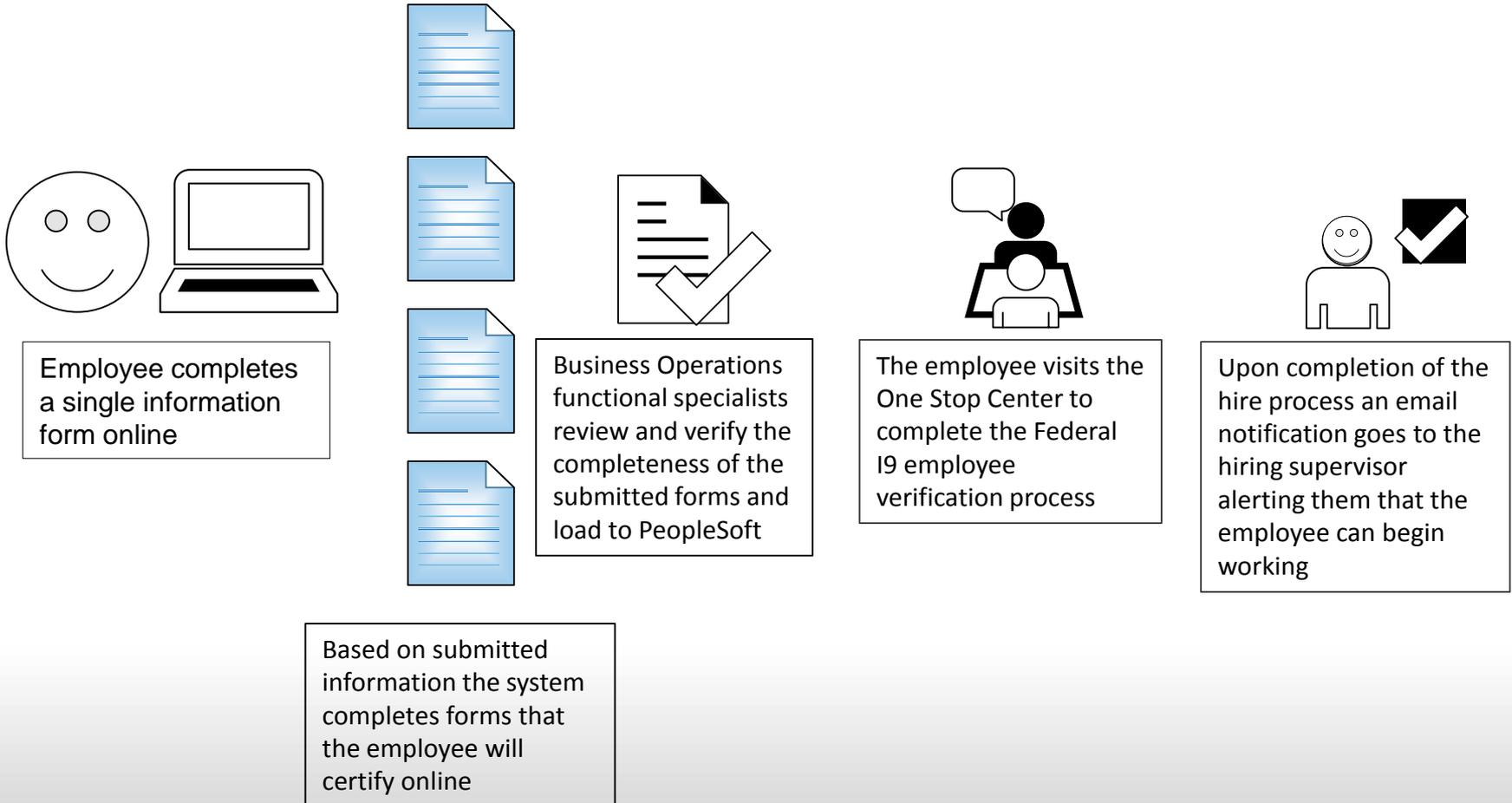


- **Paper** process
- 36 pages include 13 forms
  - 13 requests for name
  - 10 requests for social security number
  - 9 requests for local address
- Documents reviewed by department
- **Manual** entry by Payroll staff



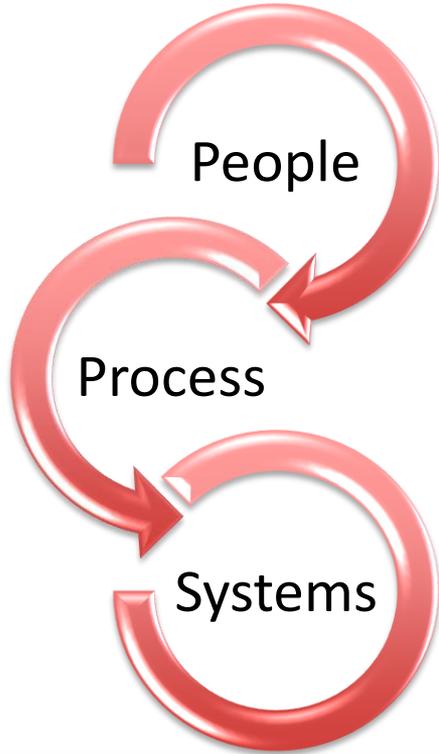
# Belknap Campus Shared Services

## Onboarding process example



# Belknap Campus Shared Services

Phase II – 2017 anticipated



**Transactions** - Over 100,000 annually

## Processes

1. Procard reconciliations
2. Program/account reconciliations
3. Travel and expense reimbursements
4. Leave management

**~19 FTE of effort**



# Belknap Campus Shared Services

## Phase II timeline

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# Belknap Campus Shared Services

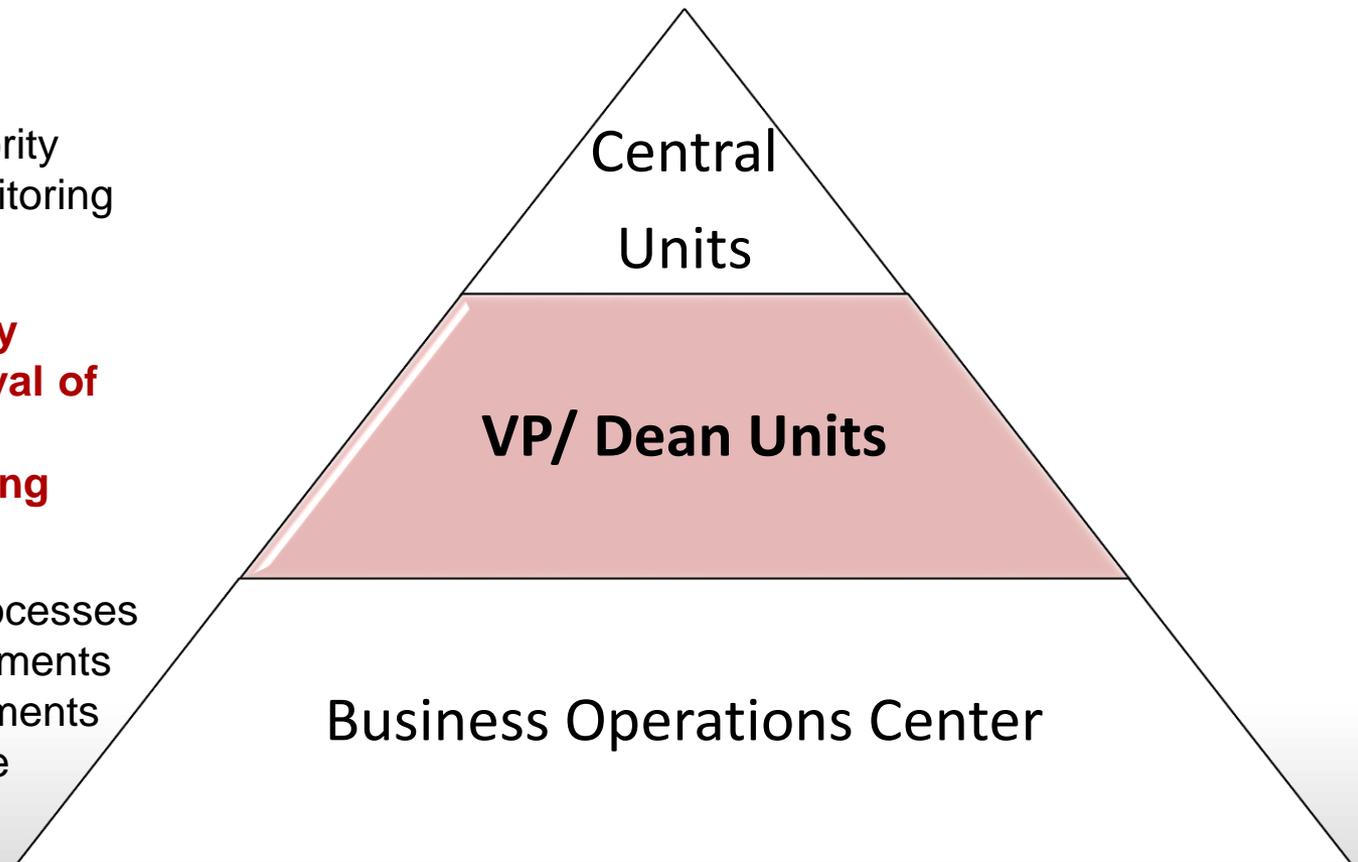
## What remains in the units?

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- Regulatory authority
- Compliance monitoring

- **Budget authority**
- **Initiation/approval of transactions**
- **Strategic planning**

- Transactional processes
- Process improvements
- System improvements
- Customer service excellence

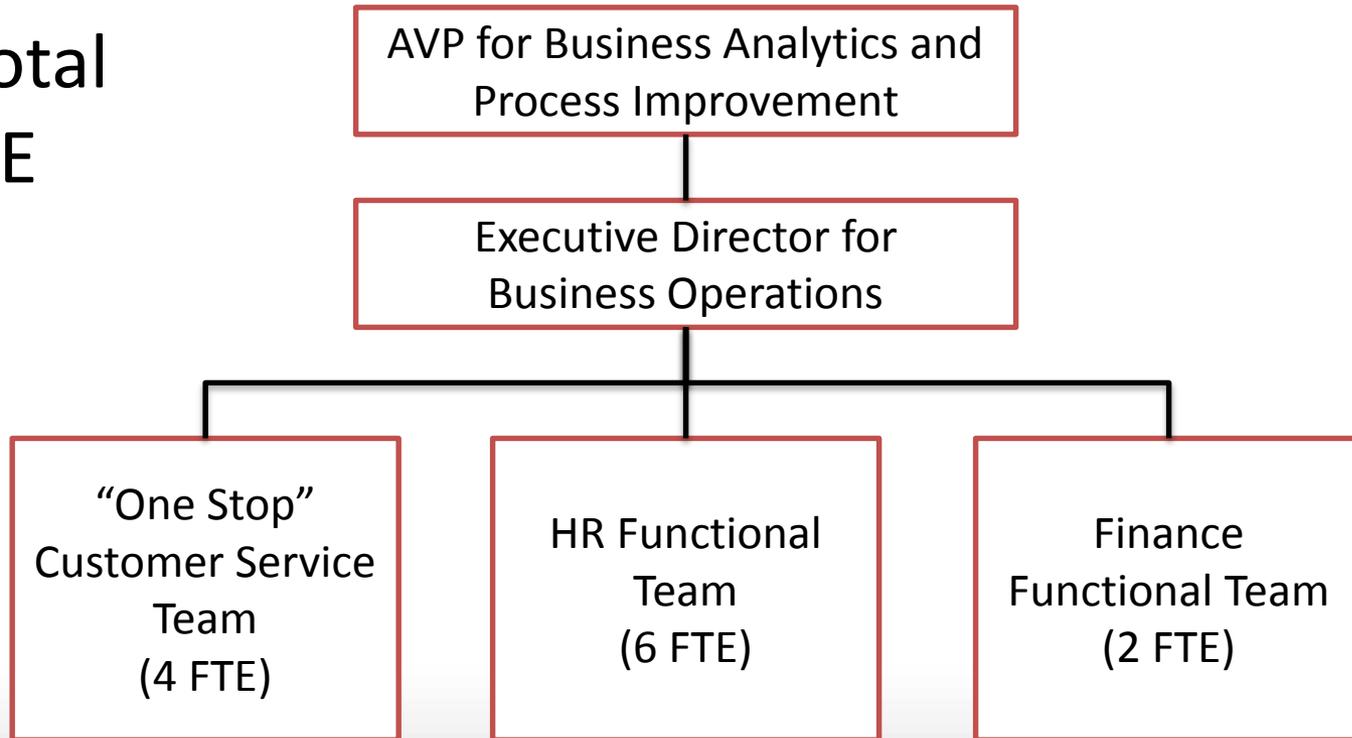


# Belknap Campus Shared Services

## Organizational Chart (Phase I)

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13 Total  
FTE





# Belknap Campus Shared Services

## Communication Plan: February – December 2016

Audience	Message	Channel/Description
Shared Governance (Staff & Faculty Senates)	<ul style="list-style-type: none"> <li>• Kick-off announcement</li> <li>• Updates to executive committees and regular meetings</li> </ul>	<p><u>Email</u>: kick-off announcement, notifications and metrics</p> <p><u>Meetings</u>: Meetings with each group to discuss and get feedback.</p>
President/Provost/ VP/Deans	<ul style="list-style-type: none"> <li>• Kick-off announcement</li> <li>• Feedback meetings</li> <li>• New process notifications</li> <li>• Quarterly updates with metrics</li> </ul>	<p><u>Email</u>: kick-off announcement, notifications and metrics</p> <p><u>Meetings</u>: Individual meetings with each VP/Dean to discuss and get feedback.</p>
Lead fiscal officers (LFOs)	<ul style="list-style-type: none"> <li>• Kick-off announcement</li> <li>• Regular LFO &amp; UBM Meetings</li> <li>• New process notifications</li> <li>• Quarterly updates with metrics</li> </ul>	<p><u>Email</u>: kick-off announcement, notifications and metrics</p> <p><u>Meetings</u>: LFO/UBM group meetings to discuss, get feedback and provide regular updates.</p>
Focus groups	<ul style="list-style-type: none"> <li>• Focus group development and feedback meeting</li> </ul>	<p><u>Meetings</u>: Specific subject expert meetings to vet proposed processes and gather feedback</p>
Work groups	<ul style="list-style-type: none"> <li>• Work group meetings to develop processes and integrate feedback</li> </ul>	<p><u>Meetings</u>: Membership to include top customers, central offices, systems professionals, HSC shared services and business operations leadership to streamline processes</p>
General university community	<ul style="list-style-type: none"> <li>• Kick-off announcement</li> <li>• General information through web</li> <li>• Town Hall meetings (open forums)</li> </ul>	<p><u>Email</u>: kick-off announcement, notifications and metrics</p> <p><u>Web</u>: general vision and approach, FAQs, phase I projects details and timelines.</p> <p><u>Meetings</u>: Open forums to discuss, get feedback and provide updates. Monthly senate meetings.</p>

# Belknap Campus Shared Services

## Discussion

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