SHARED SERVICE CENTERS TASK FORCE REPORT

Recommendation Report to the President, Provost and VP for Administration and Finance

March 8, 2013

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Shared Services Centers (SSCs) Task Force Report

I. Executive Summary

President Hrabowski often shares his vision of the need for change to successfully achieve our mission. We not only have a commitment to research, education and service, we also have a commitment to our administrative operations. Our institution strongly supports faculty, staff and students and will continue to follow our UMBC guiding principle of putting people first.

President Hrabowski has challenged us to prepare for future positive growth. Self reflection as a campus is required to identify areas for improvement while creating the necessary infrastructure to achieve those goals.

The goal of the SSC Task Force is to research options and make recommendations to the UMBC President, Provost, and Vice President of Administration & Finance on how UMBC can provide better overall business services/processes to the UMBC community. The Task Force and related work/advisory groups were formulated to include all key constituencies across campus and indeed have broad representation from faculty, exempt, and non-exempt staff.

As the Task Force developed, the need for business process redesign emerged as critical to any solution. The Task Force recommends a review of critical Business Processes <u>before</u> recommending a specific task to be taken over by any SSC solution.

The Task Force maintained transparency through continuous and ongoing communication with the campus using a myUMBC Group (with membership of close to 100), town hall meetings, presentations to key council groups and faculty/staff senates.

The Task Force researched many possible solutions, including those not directly involving a shared services center model. A review by the Task Force of current administrative practices at UMBC shows that we have a highly decentralized structure with few standard business processes, inconsistent application of standards, and many small departments with little or no staffing backup.

The Task Force examined solutions that included adding more staff to current operations, a fully centralized service center for the entire campus, and shared service center clusters. Current literature, site visits, and interviews (both internal and external) were used as sources of information.

A shared services model, where a strong provider group takes responsibility for administrative and financial activity previously performed by generalist staff located in individual departments, has been successfully implemented in many research universities throughout the country.

Through streamlining, consolidation and automation, these models leverage economies of scale to increase service quality of back-office functions. A close examination of this model is central to the task assigned.

Of the solutions considered, one that is conducive to our goals and the realities of our challenges is a Shared Services model. This model provides the flexibility to individual areas supported to tailor the center to best meet unique requirements. Benefits include streamlining of processes and communication, reduction in errors, improved compliance, promotion and growth opportunities for current staff, and sufficient backup.

Any solution requires strong center leadership, free flowing communication, accountability, business process redesign, and training. Challenges include finding appropriate space and resources and overall change management.

The Task Force recommends that we establish a Phase I set of centers clustered around one college and one group of departments in academic affairs. More input from the campus community will be gathered prior to identifying the specific college and departments for Phase I. The centers should follow a set of principles that allow for flexibility while establishing accountability, clear reporting lines, cross institutional cooperation and communication, service level agreements, and trackable metrics.

We will continue to work with the campus community as we move forward in Phase I .Surveys will be distributed to end-users across campus for feedback related to tasks, business processes and their effectiveness, and solutions for redesign. We will use data gathered to establish service level agreements and metrics to track the success of the Phase I centers and use this data to adjust the model as necessary

Please see additional details below. We encourage participation in established Town Halls on April 11 to provide continuing feedback to the Task Force. Further details will be forthcoming. We will continue to work with the campus to develop a transformational action plan for administrative excellence.

II. <u>Task Force</u>

The Shared Services Centers (SSC) Task Force was established in September, 2012 with a purpose and charge to research and develop a plan for establishment and implementation of shared services centers at UMBC. As the Task Force developed, the need for business process redesign emerged as critical to any solution. The Task Force membership was built to include representation from all key constituencies across campus. Co-chaired by Nico Washington, Assistant Provost for Financial Management and Ben Lowenthal, Associate Vice President, Financial Services, the additional membership of the Task Force is as follows:

Beverly Bickel - Clinical Associate Professor

Gary Carter – Professor and Chair, COEIT

Eva Dominguez - Assistant Dean for Financial Management, CAHSS

Dean Drake - Assistant VP, Research Administration

Danita Eichenlaub - Administrative Director, JCET/GEST

Bill LaCourse - Dean, CNMS

Stacy Long - Assistant Director, DoIT

Chris Murphy – Professor and Chair, Psychology

Sharon Quinn - Director, Procurement

Suzanne Rosenberg - Professor, Biology, Robert and Jane Meyerhoff Chair

Rochelle Sanders – Director, Human Resources Compensation/Benefits/HRIS

Rebecca Struckmeier – Manager - PeopleSoft Support, FAR/OCGA

Kathy Suess – Business Manager, COEIT

Claire Welty – Professor & Director, CUERE

- The driving force for establishing this Task Force is the promising future of UMBC and UMBC's expanding research portfolio and overall growth in all areas. In order to provide appropriate administrative support for all of our employee needs in the areas of human resources, recruitment, payroll, procurement, accounts payable, travel, grants and contracts administration (pre and post award), financial management and analysis, IT support, and inventory, we recognized the need to improve business process standards throughout campus. A specific commitment made by President Hrabowski to the Board of Regents to improve our business infrastructure provides additional impetus for change. The "Task Force charge" states this as follows:

UMBC has experienced tremendous growth in many areas in the past decade. Enrollment has increased by nearly 2,000 students, from 11,237 in Fall 2001 to 13,199 in Fall 2011. The total university budget has gone from $239M in FY 2001 to $370M in FY 2013. Externally sponsored research activity has increased 50% from 2000 to 2010 from $64M to $95M. There is consensus that the administrative infrastructure required to effectively manage this growth in both magnitude and complexity has not kept pace. **With the intent to establish a strong platform of financial and administrative management to enable UMBC to continue to thrive and expand**, there is a need to engage a campus-wide group of thought leaders to

determine a course of action to make this happen. Many leading research universities across the country have moved to a shared services model, where a strong provider group takes responsibility for all administrative and financial activity previously performed by generalist staff located in individual departments. Through streamlining, consolidation and automation, these models leverage economies of scale to increase service quality of back-office functions.

Some of the benefits realized at other campuses through establishment of these centers include:

- Higher level of specialization allowing for greater assistance in proactively resolving issues.
- Broader knowledge of administrative and financial policies, processes and procedures, providing stronger support and backup for all campus departments.
- Improved transactional flow and accuracy to reduce duplication of effort and errors.
- Greater ability to use technology to improve communications and to report to senior leadership, chairs, directors, faculty and staff.
- Strengthening of all aspects of compliance with external and internal policies and procedures.
- Improved audit results.

As the Task Force developed, the need for business process redesign emerged as critical to any solution. The Task Force researched many possible solutions, including those not directly involving a shared services center model. Our task is to objectively assess possible solutions and then to match any potential solution with the particular needs of UMBC – now and for the future.

The stated goals of our Task Force were to:

- Identify existing shared service center models

- Commission and support smaller working groups to address specific issues.

- Recommend shared services center model(s) for UMBC environment, including number of centers and areas served.
- Report recommendations to the President, Provost and Vice President for Administration and Finance.
- Develop implementation plan for shared services centers.
- Communicate progress, recommendations and plans with the campus.

The Task Force began meeting on a bi-weekly basis in October 2012 with the goal of our initial recommendation being written by the end of calendar year 2012. Given the wealth of

information available and the need to gather data and survey campus personnel while keeping lines of communication open, it became quickly apparent that the goal was not going to be met. We recommended adding a couple of months to the research phase and issuing the report in late February.

In consideration of the aggressive timeline, the Task Force immediately established separate work groups in four key areas: Data, Communications, Needs Analysis and Business Process, and Models. Each of these work groups was assigned specific tasks and also met bi-weekly on the week between Task Force meetings. The workgroup responsibilities are:

Communications Workgroup – This workgroup is tasked with keeping the campus informed as to the progress of the Task Force. This includes management of the myUMBC group and other outreach efforts to encourage campus-wide input, concerns, and suggestions.

Data Workgroup – This workgroup gathers and reviews data on current service center type activity at UMBC. They summarized and presented the data findings to the Task Force. This has assisted in guiding the Task Force towards a recommendation for a shared services center (SSC) model that will work for UMBC's unique environment.

Needs Analysis/Business Process Workgroup – This workgroup designed a survey for dissemination to key employees currently involved in the service tasks that might be a part of a future center. They will continue to survey additional UMBC employees as we move forward. They will distribute the survey results, and use this data to guide the Task Force towards a recommendation for a SSC model that will work for UMBC's unique environment.

Shared Services Centers Models Workgroup – This workgroup reviews information regarding different service center models implemented throughout the country. A site visit to a Cornell University, which has multiple SSC models currently implemented, took place in January 2013. The group and smaller subsets also had teleconference meetings with the University of New Hampshire, Oregon State University, and Dartmouth. The group will report back to the Task Force and again use this information to guide the model recommendation.

A guiding principle of our campus is providing all parties an opportunity to participate in decisions that impact us all. Pursuant to that principle, the Task Force has created the myUMBC group, Shared Services Centers at UMBC, to share information and encourage discussion and feedback. The group currently has over 90 members and is updated on a regular basis. In addition, regular meetings have been held with major constituent groups on campus throughout the last few months. These include VPs and Deans, Research Council, Faculty Senate, Professional Staff Senate, Chairs, SSC Advisory Board and open Town Halls. A complete listing of these meetings and future meetings planned is contained in Appendix A.

III. Identify the Goal

Once established, the Task Force initially focused on feasibility of different models for servicing and supporting administrative functions and processes throughout UMBC. As the group coalesced and thought more about our task, it became clear to all that understanding our current business processes and ensuring their effectiveness is a critical first step. To that end, the Needs Analysis/Business Process Workgroup was tasked to provide input in this area. The workgroups completed in person interviews, as well as reviewed secondary data associated with findings from outside entities. The next section of this report will summarize some of their early findings.

IV. Importance of Business Process Redesign as a prerequisite to any solution chosen.

The Task Force recognized early in our research that the need to improve business process standards throughout campus was an important prerequisite to any proposed solution. Our goal is to provide appropriate administrative support to meet our employee needs in the areas of human resources recruitment, payroll, procurement, accounts payable, travel, grants and contracts administration (pre and post award), financial management and analysis, IT support, and inventory. In order to gain a better understanding of the operations in areas identified for required business support, the following stakeholders on campus were interviewed:

- Staff in existing models of Business Centers on campus:
    - College of Engineering & Information Technology (COEIT)
    - Continuing & Professional Studies
    - Assistant Director of MIPAR (responsible for pre & post-award grant activity for a number of Social Science departments in CAHSS)
- SSC Advisory Group (15 representatives across business functional areas – see complete listing of membership in Appendix B)
- Central Office Staff in HR, Procurement, Budget, Financial Accounting Services/Office of Contract & Grant Accounting, and Office of Sponsored Programs

Stakeholders in central offices and campus departments brought valuable perspectives relating to their experiences with the business processes. A summary of their responses to interview questions, as well as the SSC Advisory Group summary is contained in Appendix C.

In our initial analysis, the following areas are recognized by the Task Force as requiring additional training, improved business process, and/or consistent application of existing business process:

- P-card
- Electronic proposal routing
- Travel
- Hiring process (hiring exception, recruitment, payroll)
- Procurement (Large purchases processing and compliance)
- Lack of electronic processing in many areas (e.g. travel; journal entries; timesheets; hiring)
- Lack of consistent standards in processing
- Guidance related to research compliance issues
- Contractual obligations review
- Audit findings
- Proposal preparation and submission
- Timely invoicing and billing
- Timely close-out and related reporting
- Regular analysis and review of financial data.
- Reconciliations
- Deficit balances
- Inability to dual route electronic proposals

Additional surveys of the end-user population on campus will take place after issuance of this report. Additional findings will be shared with the community as they emerge.

Additional issues to be addressed include:

- Clarity of accountability
- Communication between departments and central offices
- Consistent application of established processes
- Sufficient backup in all departments
- Appropriate training (particularly in the grants/contracts arena)

Recurring "themes" in the discussions were staff knowledge/skills/abilities, business process gaps that place the university at risk, and training. Discussions should continue around the business process review and training components identified. Additional analysis is required to determine the specific skill set requirements, and staffing. A campus-wide survey to assist in this process will be developed by the Needs Analysis Workgroup.

Many training courses are currently available at UMBC. Specific recommendations as to the highest priority training required campus-wide will be a continuing discussion as we move forward on the survey mentioned above. Please see Appendix D for specific training currently available on campus.

The Task Force recommends a review of critical business processes <u>before</u> recommending a specific task to be taken over by any SSC solution.   Basic questions: who, what, when, where and how, need to be asked and answered before there is a change to the current business process. A clear understanding of various business processes is required to identify best practice and standardize around that practice. Required training in the new standardized business process will be established to address any existing gaps.

V. <u>Examining Potential Solutions</u>

The evolution of UMBC has resulted in a diverse array of infrastructures and business practices to meet its financial management needs. A review of existing models that presently operate on campus are as follows:

- CNMS operates under a totally decentralized infrastructure, where the majority of financial management processes are carried out in the departments and units. The Dean's office provides oversight and review.
- COEIT/Engineering Building Business Services Center – The EBBSC supports the departments of Mechanical Engineering (ME), Chemical, Biochemical and Environmental Engineering (CBEE), and the Division of Information Technology (DoIT). The center is a hybrid between a centralized and decentralized model that works closely with the administrative leaders, faculty, staff, and students to carry out financial management and administrative activities within the departments. The EBBSC provides support for payroll processing, procurement, DoIT related billing, grants and contracts post-award management, and account reconciliations; while a large number of p-card purchases are still done in the departments.
- CAHSS, like CNMS, has highly decentralized financial management processes which are carried out in the departments and units with consultation, oversight, and review provided by the Dean's office. Staffing varies substantially across departments. Many departments have only one administrative assistant who is responsible for the full range of business and academic service tasks. MIPAR provides support for grants and contracts management to several departments and to individual faculty across the college.
- AAOU (Academic Affairs Other Units) – While these units are primarily supporting students, the overall organization is quite similar to that of CAHSS and CNMS. Highly decentralized financial management processes are carried out in the departments and

units with consultation, oversight, and review provided by the Provost's office. Staffing varies substantially across departments. Small departments have relatively few administrative assistants who are responsible for a wide range of business and academic service tasks.

Overall, these largely decentralized structures have the customers (e.g., faculty) working with business managers, payroll preparers, and purchasers in departments and units. Those units interface directly with centralized core business units, such as Accounting, Office of Sponsored Program, Payroll, Human Resources, etc. As noted by the figure below right, these two styles have inherent problems and limitations. They also clash in their effective functions and priorities. At the department level, the personalized attention to faculty grants, departmental budget preparation, monthly reports, and specialized transactions take precedence over the processing of routine transactions, training, and compliance. As a consequence, uniformity of processes across units, accurate error-free processing, and expertise for non-routine processes are all negatively impacted. In addition, financial management in the departments lacks back-up and these duties are often distributed to the academic staff. The centralized core business units must deal with numerous individual contacts using a variety of processes while lacking knowledge of department context and experience. The result is inflexibility and inefficiency at both department and central levels. A further complicating issue is the non-uniform communication mechanisms which develop between these two structures, which is based more on "who you know" as opposed to vetted, optimized, and standardized procedures and protocols.
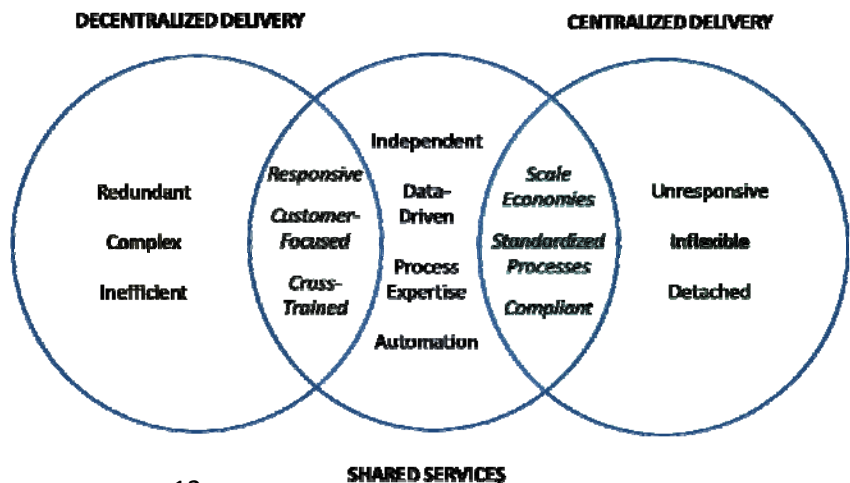
Task Force Review of Options

The goals of the Task Force include both the improvement/refinement of existing financial management on campus and the preparation for growth in research and academics. The following table delineates several options or solutions that are possible pathways to achieve the stated goals. Each has its own set of advantages and disadvantages.

Solution	Advantages	Disadvantages	Challenges
Provide more Business Managers Across Campus	- Maintains the *status quo* - Maintains disciplinary context and support - Maintains attention to faculty	- Not consistent - Inefficient - Lack of Backup - Limited opportunities for advancement - Compliance not addressed consistently - Overlap of academic and business functions by personnel - Distribution of staff and resources often not reflective of needs.	- Limited budgetary resources - Limited space
Fully Centralize all Financial Management and Business Functions	- Transactional expertise - Cross-training - Consistent compliance - Efficient, standardized processing - Allows for future growth, easier to match resources to needs.	- Loss of disciplinary context and support - Unresponsive - Detached - Inflexible	- Limited budgetary resources - Limited space - Acceptance

Solution	Advantages	Disadvantages	Challenges
Shared Services Centers	• Maintains disciplinary context and support • Maintains attention to faculty • Transactional expertise • Cross-training • Consistent compliance • Efficient, standardized processing • Back-up and redundancy • Increased opportunities for staff career advancement • Facilitates department to central office communication leading to business process improvements. • Allows for future growth, easier to match resources to needs.	● Creates difficult balance between departmental and central control	● More efficient use of available resources ● More efficient use of available space ● Acceptance

Of the solutions considered, the Shared Services model was found to be conducive to our goals and the realities of our challenges. For clarification, a shared service center acts as a conduit between the functions requiring decentralization (e.g., pre-award grants management) and those that require University-wide centralization (e.g., training and compliance). The figure to the right shows the shared service as an interface that is

DECENTRALIZED DELIVERY   CENTRALIZED DELIVERY

Redundant
Complex
Inefficient

Responsive
Customer-Focused
Cross-Trained

Independent
Data-Driven
Process Expertise
Automation

Scale Economies
Standardized Processes
Compliant

Unresponsive
Inflexible
Detached

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designed to provide responsiveness and scale among its many benefits.

"In the shared service model, a single provider absorbs transactional activity previously performed by generalists across campus. Through simplification, consolidation and automation, the task-specialized models leverage economies of scale to increase service quality of back-office functions…. Typically business support services provided by shared services are human resources, information technology, finance and procurement; other functions – such as marketing, research administration, and facilities – are sometimes included."[1]

Various SSC Models

A variety of SSC Models exist [1], which can be categorized as follows:

- *Networked Specialists* – This approach of distributed business service centers represent a compromise between centralization and decentralization by consolidating generalists into administrative clusters serving colleges or geographically-proximate units.
- *Proof-of-Concept Pilots* – This style selects a unit or process to pilot in hopes of success and further acceptance. Examples include shared services within multidisciplinary research centers of excellence around a particular innovative organizational model, piloting with units with low transactional volumes, or migrating a few business processes with high transactional volume to a centralized facility.
- *End-State Models* –These models focus on the functional goals of a shared service model and find alternate means to achieve and sustain efficiency improvements. These models may include University "311" contact centers that act as highly customer-focused, quick response call centers, the utilization of centers of excellence by well-equipped schools to acts as a fee-for service provider, or partnerships of geographically- or mission-similar institutions.

VI. <u>Summary of findings</u>

Site Visits and Support from Other Campuses

The SSC Models Work Group interacted with four campuses during the preparation of this report. Conversations were primarily with staff serving in administrative roles in the centers. Direct questions were asked regarding customer satisfaction, however, more work needs to be done to talk with customers directly. The overview of their share service models is as follows:

- University System of New Hampshire - This state system consists of four campuses throughout the state with a total budget of $970 million with shared treasury, controllership, and internal audit. Twelve Regional Shared Service Centers were

established in lieu of running business transactions through a system wide centralized service center. Business process redesign, strong communication, standardization, and automation were all critical to their success.

- University of Oregon – A large public University with budget of approximately $800 million and a large research portfolio, Oregon established service centers to move transaction activity away from the academic departments into centralized regional service centers. Seven large centers with a total of 170 employees report directly to the central finance and accounting staff with a dotted line relationship to the college academic departments. Project began with a pilot in 2008 and quickly expanded to add six more centers in the next two years.
- Cornell University – As a large research campus Cornell has implemented multiple service center models. These models include the University Business Service Center Model (UBSC), Business Service Center Model (BSC), Financial Transaction Center Model (FTC) and the Accounting Service Center Model (ASC). Each model varied from its business processes, types of transactions as well as its reporting structure. Each model was implemented in different phases and currently services approximately 80% of the campus. The service centers were funded and staffed via transferring dollars from departments and FTE.
- Dartmouth University – Dartmouth currently has five finance centers. Two of the finance centers were implemented in 2010 and the remaining three in 2011. The finance centers process financial transactions, service as conduits between divisions and central administration, develop financial reports and provide support to strengthen compliance.

Of these campuses, Dartmouth College most closely resembles UMBC in its SSC design. Dartmouth defines a finance center as "a highly skilled service unit dedicated to managing financial transactions for the divisions and professional schools."

Consultation- External

NACUBO Presentation

In July of 2012, Ben Lowenthal attended a NACUBO conference with a presentation by the University System of New Hampshire (USNH) on the topic of Improving Services with Shared Business Services. Nico Washington and Ben Lowenthal conducted a follow-up interview with Ken Cody, Vice Chancellor and Treasurer of USNH, to further explore the shared services center concept. The conclusions garnered from the presentation and interview are listed below:

- The Director position within any shared services center is critical to its success. USNH recommends a CPA and MBA for all candidates.
- Upper management support and leadership is identified by Cornell as another critical success factor.
- Shift to SSCs led to lower costs per transaction across the board.

- USNH established 12 SSCs to service four institutions with a total budget of $970 million.
- Cornell consolidated SSCs from 32 distributed centers to 9 more centralized centers to support a university with a total budget of 3.42 billion dollars.
- Clearly defining roles and responsibilities is another key success factor.
- Reporting lines remained in the colleges with Deans accountable for performance of the centers and a dotted line relationship to central finance administration.
- Work effort surveys and data on number of employees, and number of transactions processed were useful in determining areas of greatest need and benchmarks for staffing levels required.
- Employee changes (numbers and personnel) were managed through hiring, attrition and retirements at both USNH and Cornell.
- Consistent and clear communication with all campus constituencies throughout the change process led to better solutions and a more informed campus community.
- Contracts and grants administration stayed primarily in the departments with shared Services center reviews for compliance. In a few cases (exception rather than the rule), this was absorbed at the SSC level.
- Compliance improved after establishment of the SSCs.
- SSCs freed up faculty and administrative assistants within the departments to concentrate effort on their primary jobs – education (educational support) and research.
- Simplification, standardization, and automation of business processes produced significant efficiencies and led to success of SSCs.
- One size does not fit all – encourage flexibility within the framework model.
- Training of personnel and a continuous feedback and communication cycle ensure continued success.

Education Advisory Board

The Education Advisory Board has been providing best practice research to various organizations for over 30 years. The SSC Task Force reviewed and discussed the Education Advisory Board publication, "Making the Case for Shared Services: Lessons for Overcoming Obstacles to Business Process Reform". The conclusions garnered from the publication are listed below:

- Shared Services is the direction of many universities as it reduces costs and provides redundancy for coverage of business services.
- The responsiveness, customer focused approach, automation and process expertise offered by shared services allows for continuous business process improvement.
- The implementation of shared services can be difficult due to personal relationships with administrative staff and faculty.

- Inefficiencies on many campuses have been identified, however, it is very challenging to separate the roles and responsibilities of staff in the academic departments and create business processes to accommodate all.
- Issues to consider when implementing shared services include space, inadequate staff training, faculty equating proximity with service quality, and a lack of process governance to ensure that policies and internal controls are followed.
- Implementing multiple shared service centers with two-way governance is highly recommended as it improves process standardization.
- Emphasized the importance of considering both the breadth of functions and transaction volumes when implementing shared services.
- Recommends the use of surveys to assist with determining transaction volumes and staffing levels needed.

POTENTIAL SSC OPPORTUNITIES, ISSUES, AND SOLUTIONS (based on research completed by the Task Force)

OPPORTUNITIES:

- The University will capitalize on the strengths of individuals.
- Simplification and streamlining of processes will result in efficiencies.
- Tasks will be performed with greater consistency.
- Reduce financial & payroll transaction processing errors.
- Provide flexibility to respond to increases in workload.
- Strengthens our ability to fulfill our external compliance requirements.
- Reduces the cost of financial processes by eliminating redundancy and duplication.
- Better alignment of roles and responsibilities across the University.
- Save time by having more proficient, knowledgeable and empowered specialists handling processes.
- Administrative staff in academic units will be able to provide more programmatic support to their departments.
- Back-up staffing will be available to handle work during vacation leave, sick leave, and staff turnover.
- Easier to identify and respond to training needs.
- Improve relations with administrative units by streamlining communications.
- Create promotion opportunities for existing staff.

ISSUES & SOLUTIONS:

- Communication flow is critical as fiscal responsibility remains with the department, and financial transactions are processed in Shared Services Centers.
- Clear job descriptions are necessary to ensure that skills of current administrative staff are matched with those required in the Shared Service Centers.
- To ensure high morale, Shared Service Center tasks will vary and staff will be cross-trained leading to high quality of work.
- Recommended Shared Service Centers will be clustered in relatively close proximity to departments they serve.
- While some degradation of individual attention will occur, service level agreements, redundancy and higher level of expertise will be designed to offset these concerns.
- Change management is critical to ensure that employees remain confident in the safety of their positions.
- Clear direction and purpose will lead to increased efficiency and reduced bureaucracy.
- HR involvement is critical to ensure that all employees are placed in positions that best match their skill sets.
- Change can be disruptive and must be monitored appropriately.
- The full cost and anticipated savings of establishing Shared Services Centers needs to be ascertained.
- Finding adequate space will be a challenge.
- Continue to involve departmental faculty/staff in ongoing discussions and implementation to avoid the perception of top-down decision imposed on academic units.
- Monitor acceptance and cooperation by the units and staff to ensure successful Shared Service Centers.
- Clear reporting lines and levels of responsibility must be established.

Summary data – transactions and people per major area

A summary of the data gathered is contained in detail in Appendix E.

VII. Fitting Potential Solutions to UMBC Structure

UMBC is proud of its history and culture of shared governance. At the same time, we recognize the realities of our limited budgetary resources, particularly given the last number of years in a difficult economy.

The major colleges, administrative units, and centers have their own unique needs. We feel that the shared services center model may provide many advantages for our campus. Models can be tailored for the unique needs of each of the units being serviced.

VIII. Preliminary Recommendation of the Task Force

Based on the research contained herein, the Task Force recommends establishment of clustered centers in the "Network Specialist" model described above in Section V. While each unit will need to establish a model that works best in their individual environments, the Task Force sets out the following principles as required for ultimate success of the centers and improved business processes:

1. Initial Phase I implementation should include two centers: one to support a college and one to support one group of departments in academic affairs.
2. Expansion of the model to other units should be based on lessons learned from Phase I.
3. Business processes to be serviced should be the agreed upon (redesigned where applicable) standard process established by the University.
4. Reporting lines should be primarily to academic leadership, with dotted line responsibility to central finance administration to ensure compliance with state, federal, and UMBC policies.
5. Clear definition of roles and responsibilities of centers versus departmental staff and central administrative staff should be established.
6. Service Level Agreements establishing expected timeframes for task completion should be established.
7. Centers should be responsible for appropriate compliance and will be held accountable.
8. Centers should have a manager responsible for oversight of operations.
9. Metrics should be tracked and reviewed for continuous feedback and improvement.
10. Consistent cooperation and communication between units on campus should be strongly encouraged.

IX. What Happens Next?

Once the initial recommendation report is reviewed and shared with the campus community, additional meetings and Town Halls will be held to discuss the report and provide a forum for feedback to the Task Force. The Town Halls will take place on Thursday April 11, location to be determined. The myUMBC Group for Shared Services Centers at UMBC will continue to be monitored for feedback and discussion as well. The intent is for everyone on campus to have the opportunity to read the report and provide feedback to the Task Force on its contents.

Concurrent to the feedback process, the Task Force will move from a research and recommendation phase to an implementation phase. In order to set up our initial Phase I

service centers, many prerequisite tasks must be completed. The implementation team will need to appoint specific groups to assist the campus in completing these required tasks. The success of our shared service centers depends on the successful preparation.

Implementation tasks to be addressed will include:

- Identification of key business processes requiring redesign and/or standardization. Once identified, the group will add campus constituents to the team and work with them on each business process, defining clear procedures and preparing clear, step by step documentation on the procedures. The procedures will cover many different task areas and will require multiple groups working simultaneously to develop them.

- Working with campus leadership and facilities management to determine practical solutions regarding the physical location of the centers. Space is at a premium on campus, so this job will require creative thinking and solutions. Possible hybrid models allowing for some staff to remain in current locations while reporting to the shared service center leadership may be required.

- Establishing metrics on which to measure the success of the service centers moving forward. Establishment of Service Level Agreements (SLAs) with the departments to be served will establish clearly defined service goals with which to measure against. Our research of other institutions and literature on center metrics point to measurement of response times (e.g. – entry of DBEs – changes in labor distribution – within two business days of receipt of request) as a key metric to track. Other metrics will have to be established as well.

- Working with Human Resources to establish clearly defined roles and job descriptions for all positions within the shared services centers, as well as administrative support positions remaining in the departments. Job descriptions and progressions gathered from many peer institutions during our research will be used as samples and points of reference as these descriptions are drafted for UMBC.

APPENDICES

APPENDIX A - Campus Communication & Meetings

Sequence #	Target Date	Communication Tool	Audience	Type of Presentation
#1	Nov-12	President's Council	VPs and Deans	Concept Presentation
#2	Nov-12	Research Council	Research Leadership	Concept Presentation
#3	Nov-12	Insights Weekly	Campus-wide	Committee drafted language
#4	Nov-12	UMBC Website (myUMBC Group)	Campus-wide	Will allow for constant updates and 2 way communication.
#5	Nov-12	PSS – President (option to expand to entire group)	Exempt Staff	Concept Presentation
#6	Nov-12	NESS – President (option to expand to entire group)	Non-exempt staff	Concept Presentation
#7	Nov-12	Faculty Senate	Faculty	Concept Presentation
#8	Nov-12	Academic Affairs Presentation	Academic Affairs Leadership	Concept Presentation
#9	Nov-12	Post Award Steering Committee	Administrators & administrative staff	Concept Presentation
#10	Nov-12	BMG Meeting Presentation	Administrators & administrative staff	Conduct presentation to members
#11	Dec-12	Town Hall – CAHSS	CAHSS Chairs	Concept presentation and discussion
#12	Dec-12	President's Council	VPs & Deans	Update on progress – site visit
#13	Jan-13	Opening Meeting- CAHSS	CAHSS Leadership	Update on progress – site visit

#14	Jan-13	Advisory Group Meeting	Advisory Group members	Update on progress – site visit; open discussion
#15	Feb-13	Research Council	Research Leadership	Recommended model
#16	Feb-13	Professional Staff Senate	Exempt Staff	Recommended model
#17	Feb-13	Non-Exempt Staff Senate (NESS)	Non-exempt Staff	Recommended model
#18	Feb-13	Faculty Senate	Faculty	Recommended model
#19	Mar-13	President's Council	VPs and Deans	Recommended model
#20	Mar-13	Insights Weekly	Campus-wide	Recommended model
#21	Mar-13	IT Steering	Faculty & Staff	Recommended model
#22	Apr-13	Town Halls – Campus Wide	Faculty & Staff	Recommended model

Presentations highlighted are already completed.

APPENDIX B - SSC Advisory Group

SSC Advisory Group Membership

Phyllis Addison, Accountant, Visual Arts

Linda Brown, Associate Director, MIPAR

Sandy Campbell, Director, Advancement Operations, Institutional Advancement

Michael Dillon, Associate Vice Provost, Institutional Research

Debra Dixon-Lee, Director, Student Affairs

Sharon Doherty- Ritter, Management Analyst, Management Advisory Services

Gina Fischer, Business Manager, College of Engineering and Information Technology

Jane Henderson, Business Services Specialist, Chemistry and Biochemistry

Pat Jarkowski, Manager, Classification/Compensation, Human Resources

Karen Mattingly, Coordinator, College of Engineering and Information Technology

Scott Randles, Director, Finance and Administration, Continuing and Professional Studies

Barbara Smith, Administrative Assistant II, Undergraduate Education

Trina Torkildsen, Accountant I, Sociology and Anthropology

Elle Trusz, Program Management Specialist, Gender and Women Studies

Bridget Watson, Enrollment Management Specialist, Enrollment Management

SSC Advisory Group Discussions Summary

January 29, 2013

The SSC Advisory Group met on January 29, 2013 to discuss what is working and what is not working on campus. Many of the members felt that they were already involved in a shared service center in some form or another. They were specifically asked what business processes they feel we need to improve. From the discussion, the following areas were identified as needing of improvement:

- Consistent position description needed across the campus
- Timely processing of intercampus transactions
- Improved training for new employees

- Required supervisor training
- Need for sufficient back up support (limited staffing)
- Streamline and improving the hiring process (additional support and training)
- Consistent training and standardize processes
- Updated recordkeeping policy
- Financial data in one location
- Better Reporting
- Paper process vs. electronic processes (i.e. timesheets, procurement and pcard approval)
- Unable to enforce policy with faculty/PI
- Point of contacts – Peer mentor groups to provide ongoing assistance
- Approval processes and year-end close out processes takes too long.

March 5, 2013

The SSC Advisory Group met on March 5, 2013 to discuss the SSC Recommendation Report. Members were provided with an SSC Task Force update and an outline of what will be included in the recommendation report. Per their request we will share the minutes from the prior meeting. The group suggested that we explore the possibility of presenting to additional groups on campus.

The advisory group recommended the following -

- That we move both pre/post award to SSC
- Provide resources for training within the SSC
- Increase efforts to share information sooner, at each step of the process as we move toward implementation of SSCs.

APPENDIX C – Summaries of campus based interviews

Department	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
MIPAR	MIPAR is a center in CAHSS. Its mission is to link analytical resources in the university with Public Policy makers. MIPAR provides comprehensive grants administration, full proposal development and preparation, and post-award administration to Social Sciences departments with an emphasis on public policy. It does not routinely support Psychology and GES. -If awarded the grant lives in MIPAR regardless of the department it is associated with. ALL transactions related to the grant must go through MIPAR - they do all transactions related to the grants (retros, purchases, payroll (many of the faculty are on 9 month appt so the grant pays the summer salary), etc), No one on the grant outside of MIPAR has a charge card - all to keep control of the money of the grants. MIPAR provides comprehensive grants administration, full proposal development and preparation, and post-award administration	They have no backlog, all is taken care of right away. (The exception is that if something hits a closed grant in error, but this will go away once we completely inactivate the account.) - Deadlines are their own, - Communicate as necessary with departments. - Communication between MIPAR and back office is good. - Need for continuous - communication between MIPAR and the PIs they support. - They reconcile the monthly grants detail and summary reports - MIPAR walks each PI/faculty person through his/her Effort Report EACH time			**Staffing, need the right people and have to have accountability**

Department	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
COEIT	The Business Services Model is a collaborative model based on a corporate model. The Dean maintains overall responsibility for the College of Engineering and Information Technology. The Chairs maintain overall responsibility of their respective Departments. Jim Milani, in consultation with the Dean and Chairs, has responsibility for the day-to-day administrative operation of the College and Business Services Center.	Communication is even more important with a center when you don't have folks sitting in the department. Some meet regularly, some see one another regularly (proximity). No set meeting with everyone. The Engineering Business Service Center uses RT to track work requests and the staff meets regularly to review the workload. Resources in the DoIT office are occasionally used to provide backup when necessary. Retro & DBE deadlines were getting missed prior to using RT to keep track of those requests.	Biggest challenge has been having the "best fit" of people with roles within the service center. As people leave, they will be replaced in some cases with people that have a different, more appropriate skill set.

Orientation doesn't seem to cover most of the research faculty needs for information/procedures. People are teaming up with colleagues to get through issues, but that is not always good - i.e. misinformation is shared, off campus rate vs on campus rate.

Ability to have people available (skilled and have backups) to be able to workaround bottlenecks. People don't keep records in the same way, limited standardization which makes having a backup less helpful plus the backups aren't doing the work every day, and forget how things should be done. | Current service center setup in COEIT has pre award and post award separate; creates disconnect between grant activity. | Checklist would be nice along with a list of who should be contacted for what issues;

standardization of processes to ensure everyone is doing the same thing and held to the same standards for processing requests.

Improve training for campus users.

Peer to Peer connection to answer questions or share issues. |

Department	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
Budget	Work with campus to develop department working budgets and monitor the same; Work with campus Budget Committee to provide assessments for the university Process budget amendments as needed; Work with Financial Accounting on campus budget expenditures and reconciliation Provide budget projections for colleges, grants and funding for research dollars.	The process for developing the working budget; Working relationships established with campus departments and colleges. Reinforce Provost's Office position as overseeing budgets for those centers who report to the Provost. Partnership with Provost and VP of A & F Invitation to observe budget process in COEIT; very impressive process in identifying trends	Some Division Heads not responsive when problems need to be addressed Often have to provide intensive support to staff in departments who are not primarily responsible for budget tasks; or those infrequent individuals with responsibility who do not take it seriously despite continued notices; Lack of expertise filters upwards to department head, which causes risks for over-budgeting;	Responsibility for processing budget ranges from Admin Assistant to Associate Deans. Lack of checks and balances on who is doing campus budgets; if someone is funded by State support, fringes paid by State support; had to clarify how budget is distributed and managed to own source of revenue; this eliminates the "end run" on State supported budget ; Budget monitoring may become low priority when day-to-day responsibilities are more urgent.	Budget Office needs to develop training for campus Improve quality of budget management

Dept.	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
OSP	Proposal review Negotiate awards & several other agreement types Communicate on a regular basis to several external partners Meet regularly with the PI, sponsor and other stakeholders regarding pre/post-award grant activities Work with dept to accommodate back-office splits in grant activities; Administering, Advising & training the UMBC community regarding research related regulatory requirements Work extensively with several central administrative entities within UMBC Administering/enforcing federal regulatory requirements while providing related training.	Departments with Manager and Budget Person more stable in handling the process Big Centers like JCET/CUERE/GPHI, VP of Research) have staff to look at proposals; Monthly meetings with RAG to discuss research administration issues; updates on process or regulation requirements reviewed	Smaller departments not stable and tend to deviate from the process. Run the risk of committing the university to questionable activities, liability and loss of funding; fail to seek guidance on appropriate method of getting things done. Smaller academic departments with inadequate staff to support contract and grant administration require continued hand-holding resulting OSP put in the middle of back-office disputes (when administrative staff are not supported by department head when alerted to questionable actions by PI).	Where staff lack required skills and abilities, or do not have staff to support grant administration, OSP must draft, complete and submit proposal packages Trouble getting final reporting from faculty	Departments put their own packets together; SSC would provide the layer of review before it gets to OSP. Layer of accountability and support at the department head level for staff who are handling contracts and grants. Express concerns about questionable grant activity of PI. External training to departments with grants management responsibilities including Research Administrator Group (eg, NCURA and NACUBO) Enhance monitoring of grants/contracts for additional compliance/reporting.

Department	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
Financial Services/ OCGA	Responsible for Financial Accounting, Contracts and Grants, Payroll Accounting, Accounts Payable and PeopleSoft Financial Support Unit. Reporting to external agencies (federal, state, USM) as well as for departments, Deans, Directors, President, etc. Handle all contract and grant monitoring Responsible for reconciliation of records, expenditures, revenue and cash with the State of Maryland.	Staff are dedicated; treat each other with respect; provide service to the best of their ability to all internal and external stakeholders; Folks work hard and have high work ethic. There is a better understanding of State unrestricted funds vs. more complex contract and grant requirements and regulations.	Central and departmental business staff in support of accounting functions often have limited education (degree in Accounting) and experience in the field. Impacts ability to properly address and resolve more complex accounting issues. Some have no interest in Accounting as a career and have minimal time, given other responsibilities, to address accounting related issues. University accounting requirements; often analytical focus required is absent; The desire to know and understand the requirements is not there; additional responsibility given without understanding whether it was desired;	Business processes and staffing infrastructure to ensure audit compliance, efficiency, reporting were not put in place to accommodate growth; Audit control standpoint, the appropriate checks & balances not being in place have caused the university to realize negative audit comments in recent years. Skill sets required for growth and major initiatives not present in staff responsible for particular areas.	In terms of accounting deadlines (contracts & grants), these are very regulated; SSC approach would be helpful in meeting deadlines; training and skillset for SSC staff must be present; no flexibility for error on this point.

Department	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
Procurement	Review requisitions and issue Purchase Orders (P.O.) Issue, Monitor and train on P-Card Reporting for MBE and SBR for Governor's Office Review, negotiate and approve all contracts (includes renewals and amendments to existing contracts) Solicitation of bids and RFP's for the campus' goods and services Work with OSP on all grants by issuing the P.O. which is used as grant number Conduct year-end roll-over for the university's financial system; includes interface with Accounts Payable and IT	Monthly P-card Training is effective; also train new hires Notification to departments when infractions occur or have been identified by the State/USM Collaboration with IT and Financial Services on year-end is effective and smooth	Conveying requirements to depts is a challenge For example, offices requiring 2-3 phone calls to give them an understanding of what is required. Despite changing model of training, we do not see improvement (especially in smaller departments); errors have been accepted as the norm; Procurement staff end up resolving many issues departments were supposed to deal with Continuously provide the same services to the same people for the same things. Sometimes we are enabling.	Often, approvals of requisitions cannot be made because approver isn't available or documentation not there; disconnect with departments providing what is needed vs. rushing requests through; expectation is to still put request through and obtain documentation later. Unrealistic expectations of turnaround time; expect Procurement staff to drop what they are doing to handle immediate requests	Identify timeline for getting requests through; this would help with managing expectations of departments. Establish expectations for work completion (put together a calendar for year-end; if not received by specific date/time, action will not go through that cycle). SSC would be ideal for smaller departments, but the right people must staff it

Dept.	Overview of Function	What is working	What is Not Working	Gaps in Process	Strategy to Resolve
HR	Campus Department Heads, Business Mgr and Payroll Preparers work with each of the five functional units of HR in various degrees; specifically: Classification/Compensation: to establish positions; modify positions; and other special action salary requests and reviews, and position mgmt requirements. Recruitment/Employment: recruitment and hiring of vacancies, advertising, selection approval and assuring adherence to policies and procedures during process and providing guidance to hiring departments; coordinate hiring exception process; approve Contingent contracts. Payroll: placement of faculty, staff, grad assistants and students on payroll; troubleshooting various payroll issues and process requirements.	Existing SSC on campus have finger on the "pulse" of what is going on with departments they support; work with HR to address and resolve issues. Larger departments require minimal coaching; staff not only ask questions, but seek to put information to use in their departments; they communicate with HR units and thoroughly review documents before submitting; they understand and adhere to deadlines; and utilize training and website resources. Able to work effectively with department	No accountability; disconnect between administrative preparers and approvers as it relates to work product Lack of engagement between Business Manager, Department Head or faculty with administrative/payroll preparer; there are times when preparer is not aware of new hires, grants, etc. and must play catch up. HR put in the "middle" of department disputes; if friction exists in the campus department it spills over into required work (ex. Business Manager did not want to make employee and PI fix documents required for audit compliance; often must escalate to division level when not	Frequency of exposure to processes; cross-training (if alternates not exposed to transactions, knowledge is lost) Emergency preparedness not built in between departments and divisions; current set up does not deal well with turnover and maintaining daily operations; point of contact at division level not always effective; while HR can provide general training for required processes, more specific detail regarding	Having a process in place to ensure PI's and departments are aware and trained in submitting required documents. Standard for getting people on payroll; controls Caution no to just create an ineffective "layer" between central offices and departments; maximize liaison relationship; if department is part of a SSC, then the department should go through the SSC and SSC contact HR and other central offices.

Benefits: timely enrollment of regular faculty/staff in the various benefit programs; highlighting available campus resources associated with specific employee groups. HRIS, Leave & Timekeeping: new hire issues and personnel action changes for faculty, staff, grad assistants and students; PS security; reporting requests; time and leave requirements and processes; time & leave policy updates.	heads/directors. Coordination of effort between HR and other central campus offices is good; deadlines communicated effectively; however, when changes or variations in schedule occur, no acknowledgement or effects of change is communicated to HR. Training meetings very well attended; however, effectiveness sometimes linked to frequency of exposure. Larger departments have HR liaison who is familiar with processes and communicates when needed.	necessary). Smaller departments require more hand holding and guidance. Staffing in current SSC challenging; not all individuals possess required KSA's to get job done; or staff responsible for tasks outside level of expertise; working to resolve the issues. Frequency of exposure to transactions often dictate if individual has mastered process. Dept staffing depends on amount of review (e.g. student employees need to reviewed and monitored for payroll calc than a dept with straight salaried pop	specific types of scenarios are available at division level. Retroactive hires (department can't get required information from new employee to close out recruitment, hiring, payroll and benefit process). Initiative to remain abreast of existing or changing policy or procedure; effort to master required knowledge not always given priority.	Cross-training is critical for business continuity; alternates need to remain up to speed on business process requirements and changing policies/procedures.

APPENDIX D – Functional Administrative and Business Training Currently Available on Campus

Intro to PeopleSoft / PeopleSoft Fundamentals

Internal Control Education Session

State Funding Overview for Directors

Reconciling non-project State Accounts using PeopleSoft

State Funding Overview for Business Administrators

Understanding PS Chart Strings

Understanding Combination Codes

Successfully Complete Retro & DBE Forms

Grant Overview

Grant Pre-award

Certifying Effort Reports

DRATT

Pcard Reallocation

Requisitions (Entry / Approval)

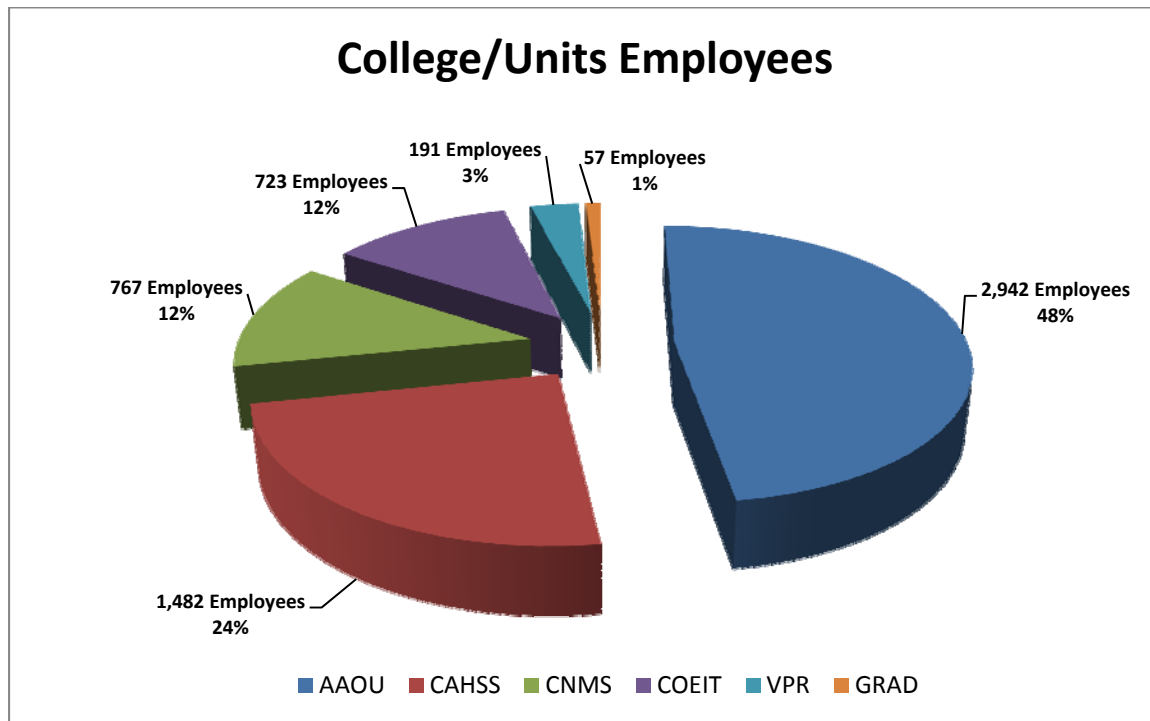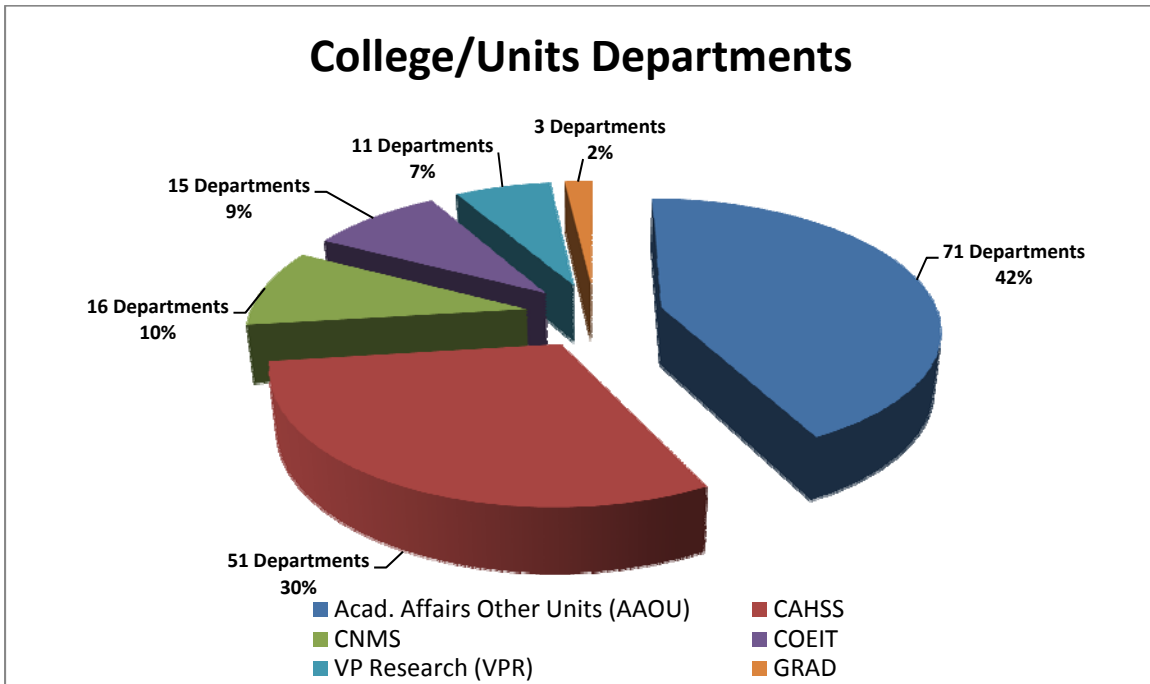Effectively Managing Your Positions

Leave Management

Change PAR C Status Changes /Employee Transfers / Pay Rate Changes / Title Changes
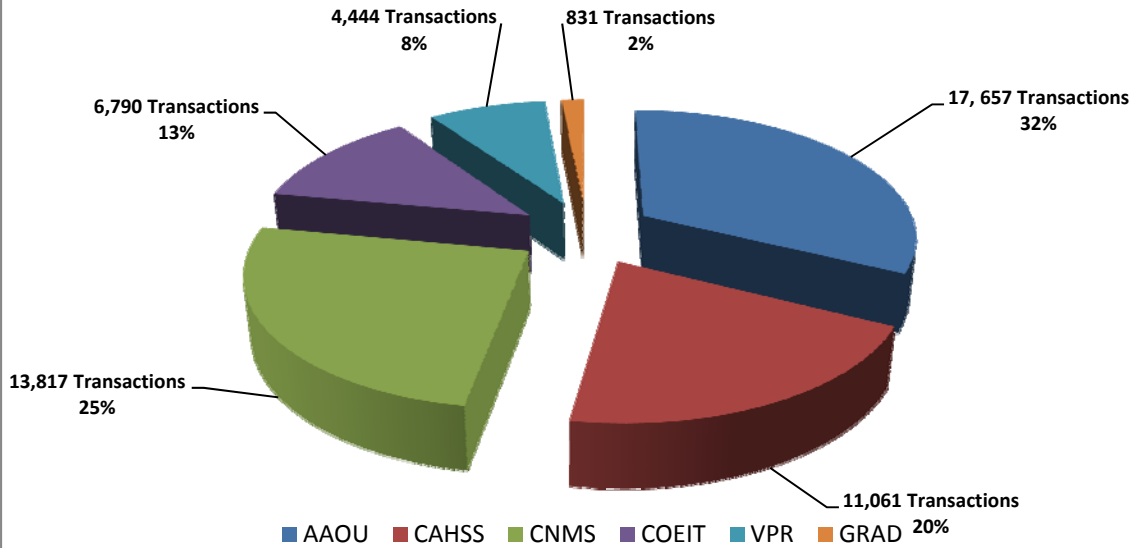
Payroll Approver

Position Management for Managers
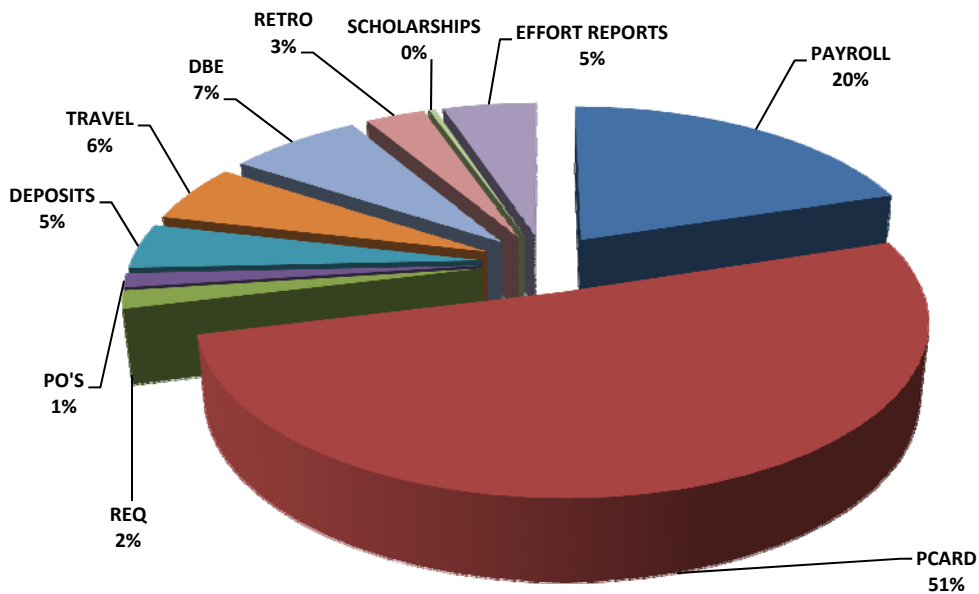
Change PAR Contract & Appointment Renewal

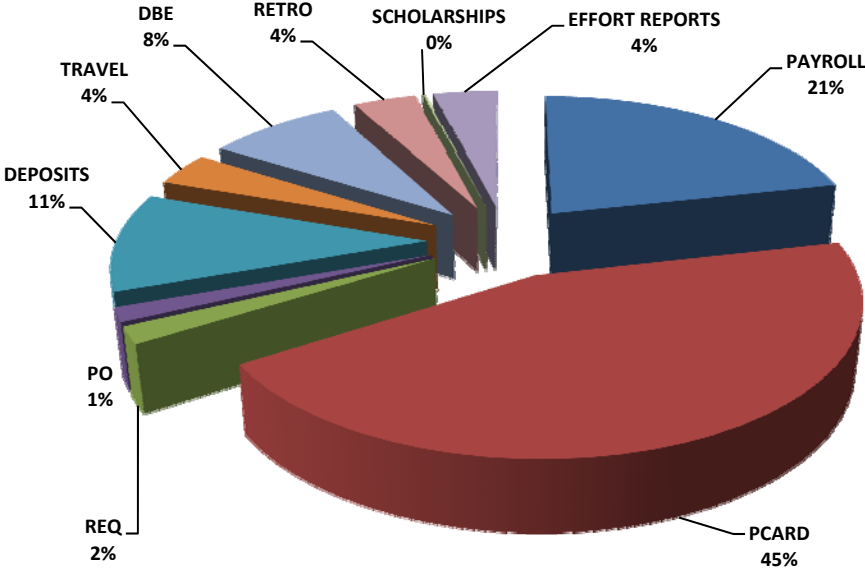# APPENDIX E – FY2012 Summary of Data Gathered to Date

College/Units Departments
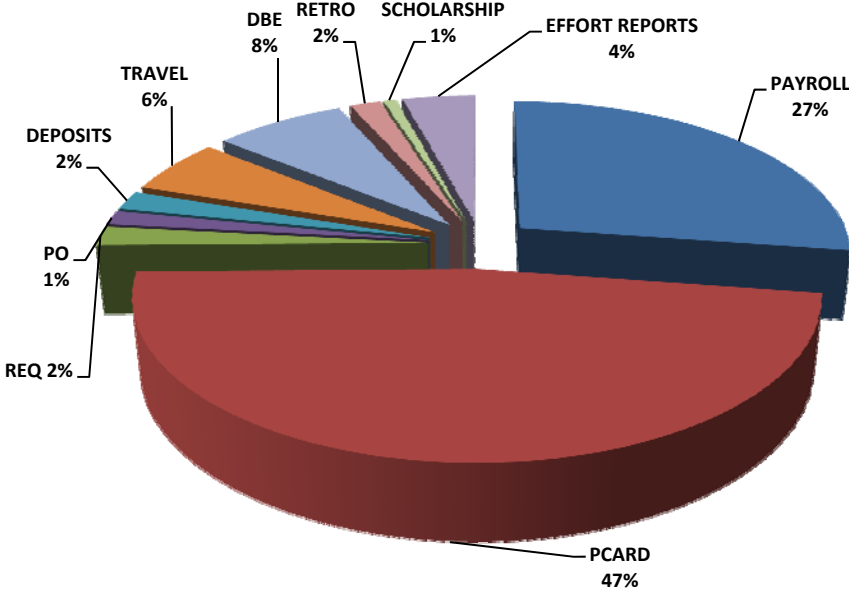
- 11 Departments 7%
- 3 Departments 2%
- 15 Departments 9%
- 16 Departments 10%
- 71 Departments 42%
- 51 Departments 30%

Legend:
- Acad. Affairs Other Units (AAOU)
- CAHSS
- CNMS
- COEIT
- VP Research (VPR)
- GRAD

College/Units Employees

- 191 Employees 3%
- 57 Employees 1%
- 723 Employees 12%
- 767 Employees 12%
- 2,942 Employees 48%
- 1,482 Employees 24%

Legend:
- AAOU
- CAHSS
- CNMS
- COEIT
- VPR
- GRAD

Transactions by College/Unit

- 4,444 Transactions 8%
- 831 Transactions 2%
- 6,790 Transactions 13%
- 17, 657 Transactions 32%
- 13,817 Transactions 25%
- 11,061 Transactions 20%

AAOU CAHSS CNMS COEIT VPR GRAD

Distribution of Transactions

- RETRO 3%
- SCHOLARSHIPS 0%
- EFFORT REPORTS 5%
- DBE 7%
- PAYROLL 20%
- TRAVEL 6%
- DEPOSITS 5%
- PO'S 1%
- REQ 2%
- PCARD 51%

AAOU Distribution of Transactions

- DBE 8%
- RETRO 4%
- SCHOLARSHIPS 0%
- EFFORT REPORTS 4%
- PAYROLL 21%
- TRAVEL 4%
- DEPOSITS 11%
- PO 1%
- REQ 2%
- PCARD 45%

CAHSS Distribution of Transactions

- DBE 8%
- RETRO 2%
- SCHOLARSHIP 1%
- EFFORT REPORTS 4%
- PAYROLL 27%
- TRAVEL 6%
- DEPOSITS 2%
- PO 1%
- REQ 2%
- PCARD 47%

CNMS Distribution of Transactions

- RETRO 3%
- SCHOLARSHIPS 0%
- EFFORT REPORTS 5%
- PAYROLL 13%
- TRAVEL 6%
- DBE 5%
- DEPOSITS 1%
- PO 1%
- REQ 1%
- PCARD 65%

COEIT Distribution of Transactions

- RETRO 4%
- SCHOLARSHIPS 0%
- EFFORT REPORTS 5%
- DBE 8%
- TRAVEL 7%
- DEPOSITS 1%
- PO 1%
- REQ 1%
- PAYROLL 25%
- PCARD 48%

VPR Distribution of Transactions

SCHOLARSHIPS 0%
EFFORT REPORTS 11%
RETRO 4%
DBE 9%
PAYROLL 12%
TRAVEL 11%
DEPOSTIS 1%
PO 2%
REQ 2%
PCARD 48%

GRAD Distribution of Transactions

SCHOLARSHIPS 0%
RETRO 1%
DBE 2%
EFFORT REPORTS 1%
PAYROLL 23%
TRAVEL 9%
DEPOSITS 3%
PO 3%
REQ 3%
PCARD 55%

College/Unit Proposals

VPR 16%
GRAD 1%
AAOU 12%
CAHSS 16%
COEIT 27%
CNMS 28%

College/Unit Awards

VPR 28%
GRAD 1%
AAOU 13%
CAHSS 17%
COEIT 12%
CNMS 29%

Departments with 1 or Less Admin Staff

Complete post-award grants and contract data was not available for inclusion in this report.

The transactional data provided in this report still needs to be evaluated for comparative complexity and effort required to process each transaction. Workload benchmarks will have to be established to determine staffing needs in the Shared Services Centers.

[1] University Business Executive Roundtable report, The Advisory Board Company, Washington, D.C., 2009