Shared Service Centers: Improving Service Levels and Efficiencies

Stig Lanesskog, Associate Provost for Strategic Planning & Assessment

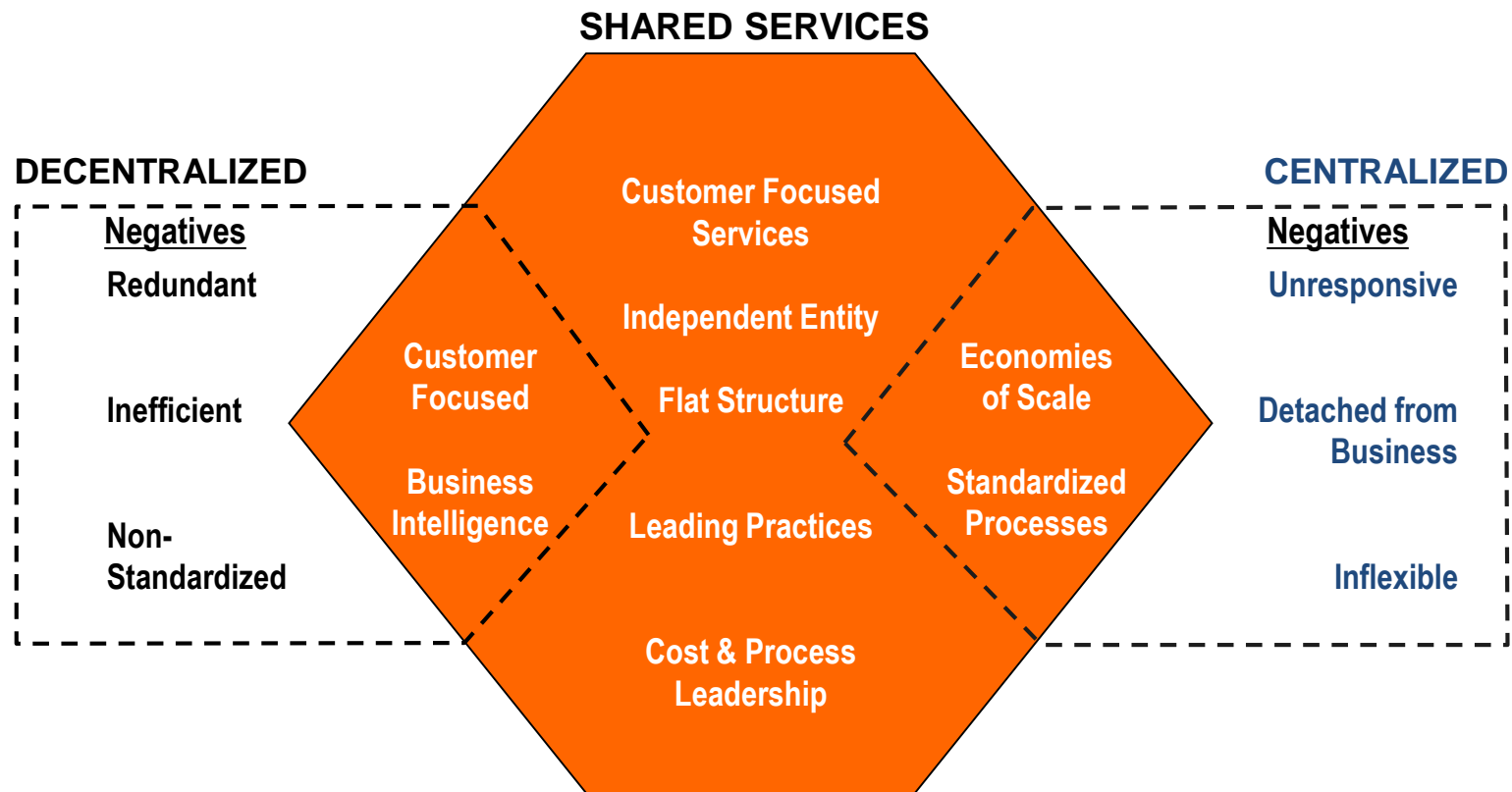Jeff Oberg, Assistant Dean, College of Engineering

Agenda

- Definition of service centers

- Purpose of service centers

- Assessment of campus services

- Provost office pilot

- Engineering College exploration

- Conclusions

- Q&A

Shared Services vs. Centralized Services

Centralized $\neq$ Shared Service

Shared Services vs. Centralized Services

Key Success Factors

- Shared governance

- Service level agreements
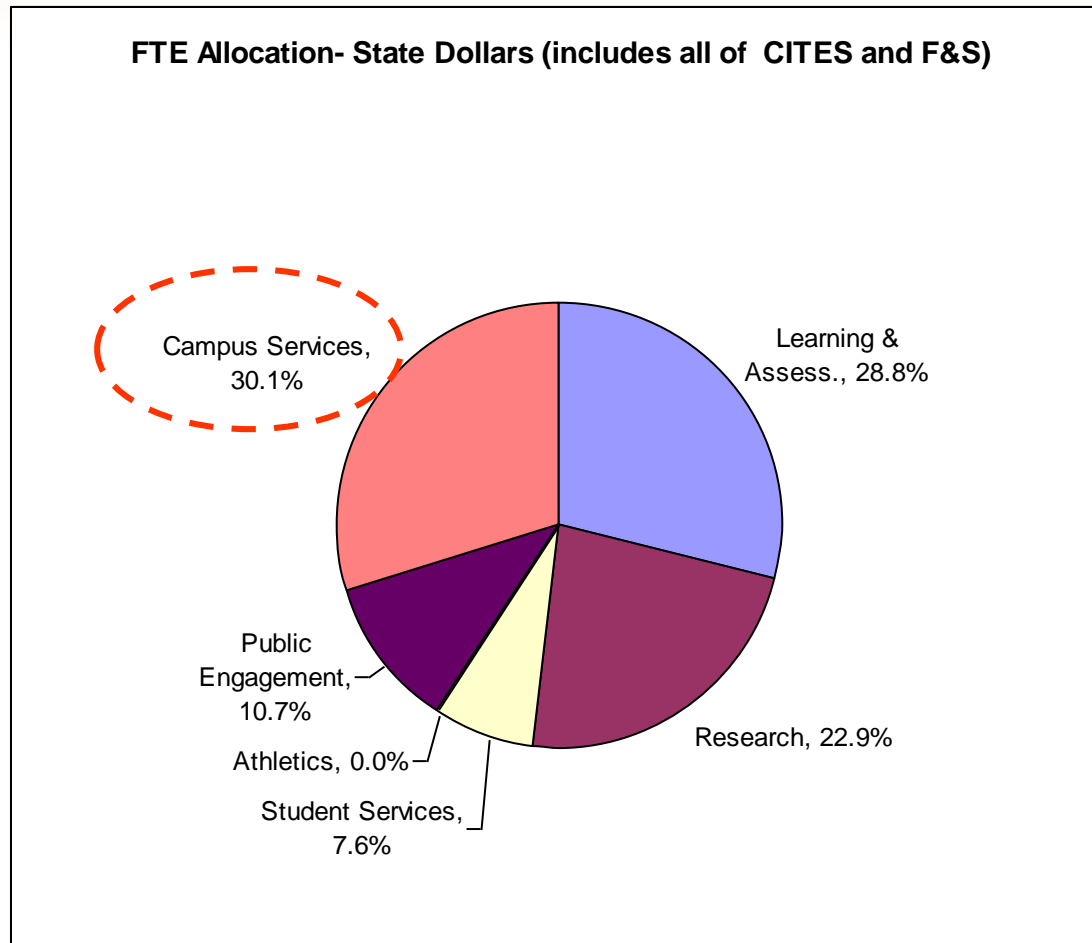
- Performance management (metrics)

Purpose

- Allow the institution to achieve **improved efficiencies** while providing a **higher level of service** to the campus then it could provide before

- Take **repetitive common processes out of Units** and moving them into a **common organization**, freeing up the units to spend **more time** focusing on their **core competencies**

Component Business Model

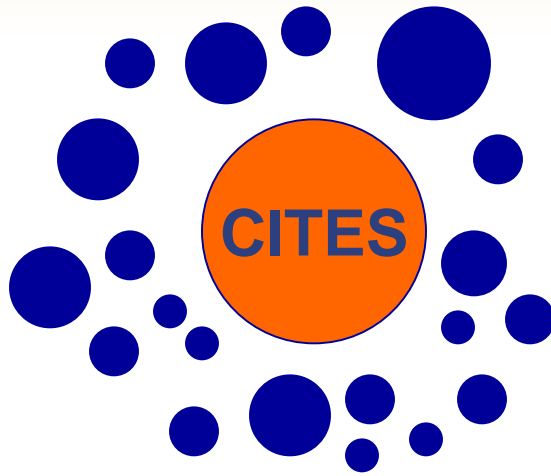|	LEARNING & ASSESSMENT	RESEARCH	STUDENT SERVICES	ATHLETICS	PUBLIC ENGAGEMENT & INTERNAL RELATIONS	CAMPUS SERVICES
STRATEGIC PLANNING & POLICY	Curricular Design	Research Strategy	Recruitment	Athletic Development Strategy	Stakeholder Communications	Human Capital Planning
	Curricular Policy Development & Review	Technology Transfer			Extension & Outreach	Finance
			Admissions & Enrollment Management		Corporate Relations	Facilities Management
	Resource Development	Research Protocol & Regulations		Athletes & Staff Recruitment Strategy	Government Relations	IT Strategy
			Co-curricular & Student Engagement Strategy		Alumni/ Association / Consortium Memberships	Auxiliary Enterprises
	Assessment Design	Intellectual Property				Disaster & Security Strategy
					Marketing & Brand Strategy	Advancement
TACTICAL OVERSIGHT / MONITORING	Delivery Solutions / Channels	Grants Management	Staff Cross Training	Athletes & Staff Recruitment Oversight	Stakeholder Management	Human Capital Management
	Content Resources / Development	Proposal Tracking				Financial Oversight
		Regulatory Tracking	Co-curricular & Student Engagement Services			Facility Utilization & Maintenance
	Learning Support Services Scheduling	Intellectual Property Tracking		Sports Program Development	Alumni and Community Programs Management	IT Management
			Advising			Information Management & Reporting
	Staffing & Scheduling	Institutional Repository				Disaster & Security Management
EXECUTION	Content Creation / Repository	Research & Dissemination	Recruiting	Athletes Assessment	Relationship Management & Communications	Administration Operations
						Human Capital Operations
	Instructional Delivery & Examination	Proposal Development	Admissions & Enrollment Management Logistics		Program Delivery	Finance Operations
		Grant Administration				Facilities Operations
	Assessment Program	Marketing and Licensing of IP	Career Services	Scholarship Administration		Advancement Administration
					Market Research & Promotions	IT Operations
	Degree & Certification	Research Infrastructure	Residential Life			Auxiliary Operations
						Public Security
	Learning Technology	Research Training & Mentoring	Crisis and Conflict Resolution	Sports Program Operations	Constituent Tracking	Legal & Regulatory Compliance
						Disaster Recovery

Component Business Modeling: Resource Allocation

Institutions must assess how its financial and human resources are allocated across its key activities
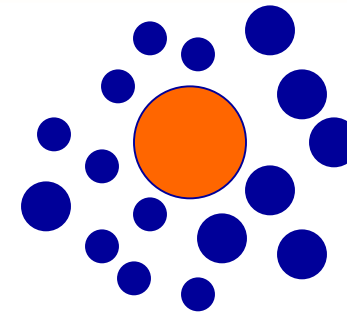

FTE Allocation- State Dollars (includes all of CITES and F&S)

- Campus Services, 30.1%
- Learning & Assess., 28.8%
- Research, 22.9%
- Student Services, 7.6%
- Athletics, 0.0%
- Public Engagement, 10.7%

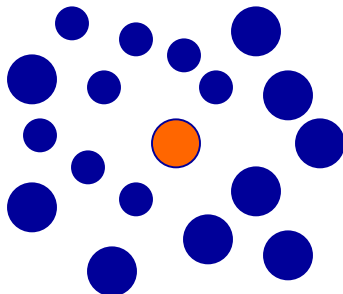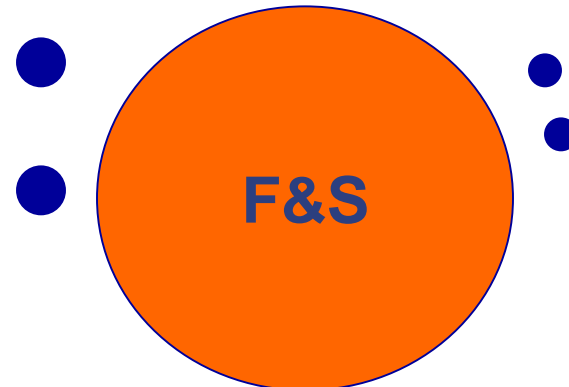# Long-term Actions for Effectiveness and Efficiency

- **IT@Illinois** - a project to redesign how we support IT on campus

- **Service Centers** - finding ways to minimize what is spent on support services

- **Process Improvement** - using business methodology to improve quality and reduce cost of delivery of support services

- **Energy Conservation** - we are moving aggressively to reduce our costs

Service Centers: Improving Service Levels and Efficiencies

Exploring Service Centers in the Provost's Office

Project Team Structure

Responsibilities

- Provide oversight/executive sponsorship of project
- Ensure linkages with other campus initiatives
- Assist with communication

Steering Committee
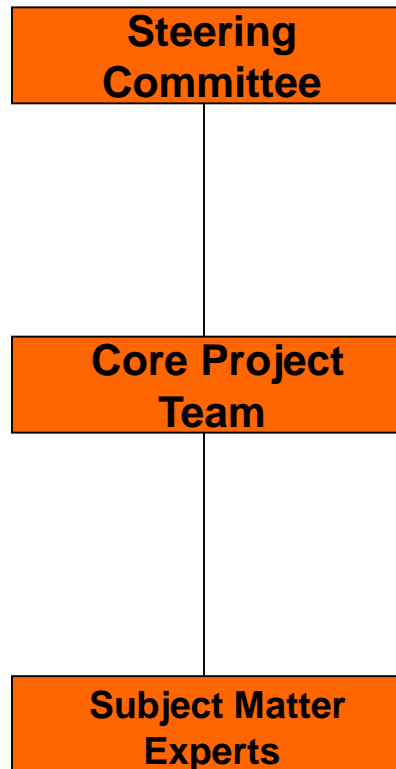
Membership

- Linda Katehi
- Mike Andrechak
- Elyne Cole
- Sally Jackson
- Robin Kaler
- Ruth Watkins

- Conduct current state assessment
- Develop future state design
- Create business case

Core Project Team

- Stig Lanesskog, Co-lead
- Keith Marshall, Co-lead
- Doug Burgett, Marketing/ Comm.
- Mona Knight, Finance/ Accounting
- Deb Stone, HR
- Stan Yagi, IT

- Provide insight into assessment of organization, process, and technology options

Subject Matter Experts

- TBD, as required

Scope- Initial Units to Investigate

Provost's Office   Primary Scope

- Academic Human Resources*
- Campus Honors Program*
- Campus Center for Advising and Academic Services*
- CITES
- Center for Democracy in a Multicultural Society*
- Center for Teaching Excellence
- Division of Information Management
- Faculty Staff Assistance Program*
- Financial Aid*
- Foellinger Auditorium*
- International Programs and Studies
- Office of Admissions and Records*
- Office for Continuing Education
- Principal Scholars Program*
- Staff Human Resources
- Swanlund Shared Service Center*
- Training for Business Professionals*
- University High School
- Visitors Center*

Others?

- Office of the Chancellor
  - Office of Equal Opportunity and Access*
  - Central Files*
  - Special Events*
  - Office of the Senate*
  - Public Affairs*

- Office of the VC for Student Affairs
  - VC for Student Affairs Development Office*

- Office of the VC for Research
  - Office of Research Administration*
  - Institutional Review Board*
  - Corporate/Foundations Relations*

- Office of the VC for Public Engagement*

- Office of the VC for Institutional Advancement*

- Other units

Functions under consideration: IT, HR, Accounting/Finance, Marketing/Communications

*- *Units supported by Swanlund System Services*

Approach

Project Planning	**Current State Assessment**	**Future State Design**	**Business Case Development**	**Implementation Planning**

Project Planning
- Establish project organization
- Finalize scope-units to be assessed
- Develop data requirements and collections tools
- Develop communications plan
- Schedule updates and status sessions
- Finalize project plan

Current State Assessment
- Define current services within each unit for review
- Allocate headcount to services
- Evaluate existing processes
- Assess technology tools employed
- Define current transaction level by function/activity

Future State Design
- Identify services to include in service center
- Determine the number of transactions for the service center by function/activity
- Develop conceptual design of service center(s), including staffing needs and organization/ governance structure

Business Case Development
- Define implementation considerations
- Determine funding model options
- Define key next steps

Implementation Planning
- Refine the activities included in the service center
- Confirm the number of people needed to support the service center
- Develop plan to transition staff to new organization
- Finalize organizational/ governance structure
- Finalize metrics and SLAs
- Finalize funding model

Completed   **TBD**

Process

- Met with all units heads to introduce topic

- Gathered metrics

- Core team met individually with each unit to review metrics and understand context

- Core team generated proposed plan

Functional Assessment

Functions Evaluated:

- Finance/Accounting
- Information Technology
- Human Resources
- Marketing/ Publications

Conservative Scenario

Delivering the <u>same services</u> that are <u>already provided successfully</u> by an <u>existing service center</u> to <u>all units</u>

Aggressive Scenario

Delivering <u>all of the services</u> that <u>do not need</u> to be <u>performed</u> at the <u>individual unit level</u>

# Functional Recommendations- Marketing/ Communications

Aggressive

- Writing (print)
- Writing (web)
- Site maintenance (web)
- Spec. appl. programming (web)
- Design (web)
- Core programming (web)
- Editing (web)
- Bidding (print)
- Editing (print)
- Design (print)
- Video- specific events
- General campus photos
- Photography- specific events

Service center transactions

Aggressive

- Number of web pages created: 1,354
- Number of web pages maintained: 14,800
- Number of print pieces or pages: 13,734
- Number of videos created
  or maintained: 35
- Number of photographs: 7,612

- Remain in unit

- A la carte

- Service center

Functional Recommendations- IT

Conservative

Conservative
Video conference
Document scanning
Document archiving
SQL database
FTP
Backup
Web services (unsecured)
Web services (secured)
Workstation support
User support
User training
File services
Print services
Blackberry enterprise server
Email
Calendar

Aggressive

| Aggressive |
|---|
| Video conference |
| Document scanning |
| Document archiving |
| SQL database |
| FTP |
| Backup |
| Web services (unsecured) |
| Web services (secured) |
| Workstation support |
| User support |
| User training |
| File services |
| Print services |
| Blackberry enterprise server |
| Email |
| Calendar |

Service center transactions

Conservative

- Full-time personnel supported: 909
- Number of PCs/Macs: 1,056

Aggressive

- Full-time personnel supported: 909
- Number of PCs/Macs: 1,056
- Number of servers: 59
- Number of web pages: 14,800

- Remain in unit
- A la carte
- Service center

Functional Recommendations- HR

Conservative   **Aggressive**

Status quo

Monitoring of ethics training
Tracking of performance evaluations
Monitoring of conflict of commit and interest reprtg.
Monitoring economic interest reporting
Bi-weekly payroll time entry
Appointment/ reappointment processing
Setting up new hires
Collection of I9's
Preparation of HRTC's for appoint. & retiree req. forms
Direct entry of NonFWS appts.
Preparation of PAPE requests
Monitoring and conducting searches
Preparing paperwork for filling CS vacancies
Process separations
Creation of and maintenance of dept. personnel files, I-9's
Academic vacation/sick leave reporting
Pay adjustments, one-time pays and lump sum pays
Visa processing
Consultation on HR related questions
Activity tracking
Salary planner and campus salary program impl.
Unit Security Cont for HR Applications

Service center transactions/ Staff needs

Conservative

Aggressive

- Appointments/ reappointments: 1,125
- Searches: 75
- Bi-weekly timesheets: 7,144
- On-time and lump sum pays: 1,180
- Visa requests: 11

■ - Remain in unit

□ - A la carte

■ - Service center

Functional Recommendations- Finance/ Accounting

Conservative

P-Card approval
Petty cash and program advance funds
Self-supporting activities (developing budgets, pricing, billing for services, etc.)
P-Card reconciliation
Travel voucher preparation
Invoice voucher preparation
WebCat purchasing and approvals
iBuy purchases and approvals
Journal vouchers
Fund reconciliation
Off-cycle/ special reporting needs for funds/ other data needs
Grant fund monthly financial reconciliation and reporting
Purchase orders
Budget transfers
Grant proposal development (budget prep, etc.)
Grant fund contract issues

Aggressive

P-Card approval
Petty cash and program advance funds
Self-supporting activities (developing budgets, pricing, billing for services, etc.)
P-Card reconciliation
Travel voucher preparation
Invoice voucher preparation
WebCat purchasing and approvals
iBuy purchases and approvals
Journal vouchers
Fund reconciliation
Off-cycle/ special reporting needs for funds/ other data needs
Grant fund monthly financial reconciliation and reporting
Purchase orders
Budget transfers
Grant proposal development (budget prep, etc.)
Grant fund contract issues

Service center transactions

Conservative

- PO's or budget transfers: 2,898

Aggressive

- PO's or budget transfers: 2,898
- P-Card reconciliations: 8,309
- Travel vouchers: 1,516
- Invoice vouchers: 2,929
- Purchases: 2,661
- Budget transfers: 237
- Journal vouchers: 8,245
- Funds to reconcile: 527

- Remain in unit
- A la carte
- Service center

Guiding Principals for Design

- Utilize existing resources

- Leverage existing models that work

- Phased approach

- Should not impact a unit's core function

Proposed Phases

1. Student Marketing Cluster
2. IT Services
3. HR
4. Faculty/Staff Marketing Cluster
5. Business/Finance

Marketing

Phase 1 -Student-focused Cluster

- Campus Honors Program
- Campus Center for Advising and Academic Services
- Financial Aid
- International Programs and Studies
  - Study Abroad
  - ISSS
- Office of Admissions and Records
  - Visitors Center
  - Foellinger Auditorium
- Principal Scholars Program
- University High School

Responsible Unit

- Office of Communications for Enrollment Services

Phase 4 -Faculty/Staff-focused Cluster

- Academic Human Resources
  - Faculty Staff Assistance Program
  - Swanlund Shared Service Center
  - Training for Business Professionals
- Staff Human Resources
- CITES
- Center for Democracy in a Multicultural Society
- Center for Teaching Excellence
- Division of Management Information
- International Programs and Studies
  - All other units
- Office of Continuing Education

Responsible Unit

- To be identified

Phase 2 - IT Services

Currently Supported by Swanlund System Services

- Academic Human Resources
    - Swanlund Shared Service Center
    - Training for Business Professionals
    - Faculty Staff Assistance Program
- Campus Honors Program
- Campus Center for Advising and Academic Services
- Center for Democracy in a Multicultural Society
- Financial Aid
- Office of Admissions and Records
    - Visitors Center
    - Foellinger Auditorium
- Principal Scholars Program

- Office of the Chancellor
    - Office of Equal Opportunity and Access
    - Central Files
    - Special Events
    - Office of the Senate
    - Public Affairs
- Office of the VC for Student Affairs
    - VC for Student Affairs Development Office
- Office of the VC for Research
    - Office of Research Administration
    - Institutional Review Board
    - Corporate/Foundations Relations
- Office of the VC for Public Engagement
- Office of the VC for Institutional Advancement
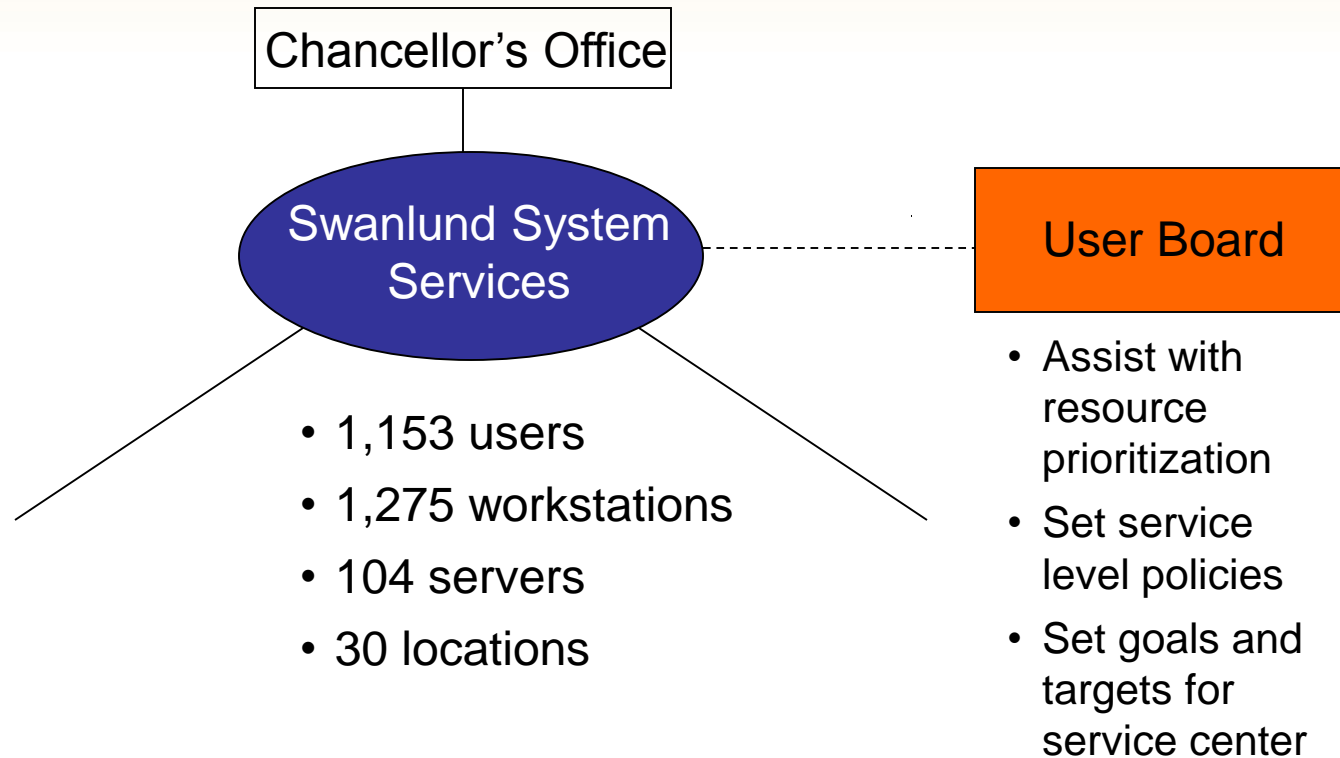
Currently Self-Supported

- CITES
- Center for Teaching Excellence
- Division of Management Information
- International Programs and Studies
- Office of Continuing Education
- Staff Human Resources
- University High School

24

IT Services
Supported by Swanlund System Services

- Academic Human Resources
  - Swanlund Shared Service Center
  - Training for Business Professionals
  - Faculty Staff Assistance Program
- Campus Honors Program
- Campus Center for Advising and Academic Services
- Center for Democracy in a Multicultural Society
- Financial Aid
- Office of Admissions and Records
  - Visitors Center
  - Foellinger Auditorium
- Principal Scholars Program

- Office of the Chancellor
  - Office of Equal Opportunity and Access
  - Central Files
  - Special Events
  - Office of the Senate
  - Public Affairs
- Office of the VC for Student Affairs
  - VC for Student Affairs Development Office
- Office of the VC for Research
  - Office of Research Administration
  - Institutional Review Board
  - Corporate/Foundations Relations
- Office of the VC for Public Engagement
- Office of the VC for Institutional Advancement

- Center for Teaching Excellence
- Division of Management Information
- International Programs and Studies
- Office of Continuing Education
- Staff Human Resources
- University High School

CITES is not included as IT is their core function

Governance- IT Service Center

Chancellor's Office

Swanlund System Services

User Board

- 1,153 users
- 1,275 workstations
- 104 servers
- 30 locations

- Assist with resource prioritization
- Set service level policies
- Set goals and targets for service center

Phase 3 - HR Services

Currently Supported by Swanlund Shared Services

- Swanlund Shared Service Center
- Training for Business Professionals
- Faculty Staff Assistance Program
- Campus Center for Advising and Academic Services
- Center for Democracy in a Multicultural Society
- Communications for Enrollment Services

- Office of the Chancellor
  - Office of Equal Opportunity and Access
  - Central Files
  - Special Events
  - Office of the Senate
  - Public Affairs
- Office of the VC for Student Affairs
  - VC for Student Affairs Development Office
- Office of the VC for Research
  - Office of Research Administration
  - Institutional Review Board
  - Corporate/Foundations Relations
- Office of the VC for Public Engagement
- Office of the VC for Institutional Advancement

Receive Occasional Support

- Office of Continuing Education
- University High School
- Campus Honors Program
- Academic Human Resources
- Principal Scholars Program

Currently Self-Supported

- CITES
- Center for Teaching Excellence
- Division of Management Information
- International Programs and Studies
- Staff Human Resources
- Financial Aid
- Office of Admissions and Records

27

Phase 3 - HR Services

<div style="border:2px solid orange;">

Supported by Swanlund Shared Services

- Swanlund Shared Service Center
- Training for Business Professionals
- Faculty Staff Assistance Program
- Campus Center for Advising and Academic Services
- Center for Democracy in a Multicultural Society
- Communications for Enrollment Services

- Office of the Chancellor
  - Office of Equal Opportunity and Access
  - Central Files
  - Special Events
  - Office of the Senate
  - Public Affairs
- Office of the VC for Student Affairs
  - VC for Student Affairs Development Office
- Office of the VC for Research
  - Office of Research Administration
  - Institutional Review Board
  - Corporate/Foundations Relations
- Office of the VC for Public Engagement
- Office of the VC for Institutional Advancement

- Office of Continuing Education
- University High School
- Campus Honors Program
- Academic Human Resources
- Principal Scholars Program

- Center for Teaching Excellence
- Division of Management Information
- Staff Human Resources
- Financial Aid
- Office of Admissions and Records

</div>

Still Exploring Options

- CITES
- International Programs and Studies

Phase 5 – Business/Finance

- Great opportunities for efficiency and improved service through specialization
- Model to be determined in coming months

Proposed Provost Service Center Implementation Timeline

Activity	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug
Student Marketing Cluster	██	██										
IT Services			██	██	██	██	██					
HR Services						██	██	██	██			
Faculty/ Staff Marketing Cluster						██	██	██	██			
Business/Finance Services									██	██	██	██

Service Centers: Improving Service Levels and Efficiencies

Exploring Service Centers in Engineering

Functional Areas Being Explored

- Information Technology

- Communications

- Business/HR

Information Technology

– Information Systems Steering Committee formed to guide efforts

– Desktop and Network Support
  - Electrical & Computer Engineering emerged as the provider of choice for most departments
  - Fee for service
  - Departments are pleased with service and cost

– Centralizing administrative data centers and moving toe consolidation of compute clusters to the extend possible

– Collaborating on common business applications

– Regular meetings of IT staff across College

Communications

– College-led coordinating efforts

– Regular meetings

– Jointly funded positions were being explored until the
financial crisis

– Web development

– Leveraging expertise among various departments

Business/HR Project team structure

Responsibilities

- Provide oversight/executive sponsorship of project
- Ensure linkages with other college/campus initiatives
- Assist with communication

- Conduct current state assessment
- Develop future state design
- Create business case

- Provide insight into assessment of organization, process, and technology options

Steering Committee

Core Project Team

Subject Matter Experts
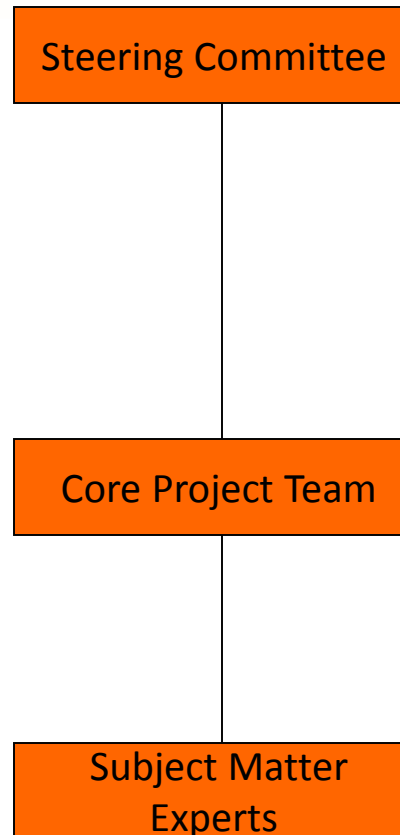
Membership

- Rashid Bashir
- Bill Dick
- Craig Dutton
- Mike Insana
- Jong-Shi Pang
- Bill Sanders
- Ed Seebauer
- Jim Stubbins
- Bruce Vojak

- Lori Ballinger-Pankau
- Randy Elkins
- Christine Majers
- Jeff Oberg, Lead
- Debby Reynolds
- Elizabeth Stovall
- Toshua York

- TBD, as required

ILLINOIS
UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Business/HR Project

- Process
  - √ Project planning
  - √ Current state assessment
  - – Future state design
  - – Business case development
  - – Implementation

- Accomplished to date
  - √ Identification of Budget / HR activities
  - √ Identification of what can be shared
  - √ Estimate of current FTE allocation for each activity
  - √ Estimate of current costs for each activity

Original Intent vs. New Realities

Original Intent

- Help small units
- Improve services
- Coalition of the willing
- Capacity for incremental growth for many units

New Realities

- Probably need to expand to all units
- Survival tactic for providing basic services in light of budget cuts
- We really don't have much choice any more.

General Guiding Principles

1. Staffing-levels will either remain the same or be reduced college-wide.

2. To the extent possible, existing staff will have jobs.

3. Efficiency will be improved.

4. Processes will be standardized.

5. Service providers must be responsive to the needs of faculty, staff, students and departmental administrators.

6. Bureaucracy will be minimized.

7. Service providers will be accountable for their performance.

8. Professionalism will be improved.

How much effort currently is expended?

ACTIVITY	ADM	AE	BIO	CSE	IESE	ITI	MNTL	NPRE	TOTAL
Finance/Accounting									
Self-supporting Accounting	0.3	0.0	0.0	0.0	0.0	0.0	0.1	0.0	**0.4**
Travel & Expense Reimbursements	1.1	0.3	0.3	0.1	0.6	0.2	0.2	0.2	**2.9**
Journal Voucher Processing	0.3	0.1	0.1	0.2	0.0	0.2	0.1	0.3	**1.1**
Fund Reconciliations	0.8	0.1	0.1	0.3	0.1	0.4	0.1	0.2	**1.9**
Property Accounting	0.2	0.0	0.1	0.2	0.2	0.1	0.1	0.2	**0.9**
Budget Transfers	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	**0.3**
Gift accounting	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Ad-hoc Financial Reporting	0.4	0.0	0.0	0.3	0.1	0.1	0.1	0.1	**1.0**
Subtotal	3.2	0.6	0.5	1.0	0.9	1.1	0.6	1.0	**8.7**
Purchasing									
P-Card	0.8	0.3	0.1	0.2	0.2	0.2	0.2	0.6	**2.5**
Petty Cash and Advances	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	**0.2**
Web-Cat	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.1	**0.5**
i-Buy	0.2	0.0	0.0	0.0	0.1	0.0	0.1	0.0	**0.3**
Banner requisitions	0.4	0.2	0.1	0.1	0.1	0.0	0.0	0.1	**0.9**
Subtotal	1.5	0.6	0.3	0.3	0.5	0.2	0.4	0.8	**4.4**
Sponsored Program Administration									
Proposal budget preparation & processing	0.0	0.3	0.3	0.1	0.2	0.4	0.1	0.3	**1.5**
Grants Management	0.0	0.3	0.3	0.3	0.1	0.4	0.1	0.2	**1.5**
Subtotal	0.0	0.5	0.5	0.4	0.2	0.8	0.2	0.5	**3.0**
Human Resources									
Payroll & Leave Reporting	0.5	0.1	0.1	0.1	0.1	0.0	0.1	0.1	**1.0**
Appointments	0.8	0.2	0.1	0.2	0.3	0.1	0.1	0.3	**2.1**
New Hires	0.3	0.1	0.1	0.1	0.2	0.1	0.1	0.1	**0.9**
Searches	0.3	0.1	0.1	0.3	0.2	0.2	0.1	0.1	**1.4**
Visa Processing	0.0	0.1	0.1	0.3	0.1	0.1	0.1	0.1	**0.7**
Subtotal	1.8	0.6	0.3	0.9	0.9	0.4	0.4	0.7	**6.0**
TOTAL	**6.4**	**2.2**	**1.5**	**2.6**	**2.5**	**2.5**	**1.6**	**2.9**	**22.2**

What does it cost?

ACTIVITY	ADM	AE	BIO	CSE	IESE	ITI	MNTL	NPRE	Total
Finance/Accounting									
Self-supporting Accounting	$13,685	$306	$0	$0	$0	$0	$3,746	$539	**$18,276**
Travel & Expense Reimbursements	$43,029	$13,888	$6,844	$1,482	$20,654	$7,169	$9,751	$6,144	**$108,961**
Journal Voucher Processing	$12,227	$4,665	$3,772	$9,422	$623	$7,749	$3,746	$8,835	**$51,039**
Fund Reconciliations	$34,731	$3,085	$1,886	$15,880	$3,114	$22,960	$7,492	$9,689	**$98,837**
Property Accounting	$7,940	$1,256	$1,886	$5,730	$5,658	$8,140	$3,746	$6,144	**$40,500**
Budget Transfers	$3,285	$613	$1,886	$3,015	$623	$2,795	$3,746	$539	**$16,502**
Gift accounting	$6,502	$1,016	$0	$0	$1,245	$1,440	$1,498	$539	**$12,240**
Ad-hoc Financial Reporting	$30,259	$1,226	$0	$13,542	$3,114	$7,200	$3,746	$4,845	**$63,932**
Subtotal	$151,658	$26,055	$16,274	$49,071	$35,031	$57,453	$37,471	$37,274	**$410,287**
Purchasing									
P-Card	$32,182	$12,678	$3,772	$5,730	$6,829	$8,384	$15,487	$17,714	**$102,776**
Petty Cash and Advances	$855	$0	$0	$0	$2,803	$0	$1,498	$3,072	**$8,228**
Web-Cat	$2,279	$3,788	$1,886	$1,910	$4,038	$0	$2,751	$2,938	**$19,590**
i-Buy	$8,259	$0	$0	$0	$3,284	$0	$3,746	$0	**$15,289**
Banner requisitions	$18,853	$6,661	$3,772	$1,910	$2,509	$1,390	$1,498	$1,537	**$38,130**
Subtotal	$62,428	$23,127	$9,430	$9,550	$19,463	$9,774	$24,980	$25,261	**$184,013**
Sponsored Program Administration									
Proposal budget preparation & processing	$0	$15,323	$11,200	$6,030	$9,341	$25,200	$7,492	$16,150	**$90,736**
Grants Management	$0	$15,323	$11,200	$18,090	$3,114	$28,460	$7,492	$8,075	**$91,754**
Subtotal	$0	$30,646	$22,400	$24,120	$12,455	$53,660	$14,984	$24,225	**$182,490**
Human Resources									
Payroll & Leave Reporting	$24,369	$4,645	$5,393	$1,482	$5,017	$415	$3,449	$4,228	**$48,998**
Appointments	$56,173	$11,572	$5,393	$7,460	$16,403	$6,700	$6,445	$13,359	**$123,505**
New Hires	$12,872	$5,786	$5,393	$1,482	$12,069	$3,350	$2,002	$4,424	**$47,378**
Searches	$20,975	$4,858	$5,393	$8,889	$8,553	$11,015	$4,003	$2,212	**$65,898**
Visa Processing	$0	$2,368	$5,393	$8,889	$2,467	$3,350	$4,003	$2,212	**$28,682**
Subtotal	$114,389	$29,229	$26,965	$28,202	$44,509	$24,830	$19,902	$26,435	**$314,461**
TOTAL	**$328,475**	**$109,057**	**$75,069**	**$110,943**	**$111,458**	**$145,717**	**$97,337**	**$113,195**	**$1,091,251**

What can be shared?

Finance/Accounting	Shared	Unit	Comments
Self-supporting Accounting	X		Nearly all of these functions could be shared.
Travel & Expense Reimbursements		X	In unit due to proximity to and knowledge of faculty and students.
Journal Voucher Processing	X		Many types of transactions could be processed in a shared setting.
Fund Reconciliations		X	Requires unit specific knowledge.
Property Accounting	X		Most of the related tasks could be handled in a shared manner.
Budget Transfers		X	Requires unit specific knowledge.
Gift accounting		X	Requires unit specific knowledge. No significant volume of work.
Ad-hoc Financial Reporting	X		Clear and unanimous support for sharing this function.
Purchasing			
P-Card	X	X	Issue w/documentation for reconcilations. Dept card manager -> central
Petty Cash and Advances		X	Not much effort here.
Web-Cat		X	Not much effort here.
i-Buy	X	X	Most departments do not use. May be an opportunity to standardize.
Banner requisitions	X	X	Initial request would need to be in unit. Remaining tasks could be shared.
Sponsored Program Administration			
Proposal budget preparation & processing	X	X	Large multi-investigator, multi-discplinary proposals prep could be shared.
Grants Management		X	Clear and unanimous support for retaining this function in the unit.
Human Resources			
Payroll & Leave Reporting	X		Pay adjustments could definitely be shared.
Appointments	X		Clear and unanimous support for sharing this function.
New Hires	X	X	Offer and acceptance should remain in unit. Other tasks can be shared.
Searches	X	X	New Applicant Tracking System may facilitate common processes.
Visa Processing	X		Clear and unanimous support for sharing this function.
Non-Business/HR Services			
Safety & Compliance	X		Clear and unanimous support for sharing this function.
Unit Security Contacts	X		Clear and unanimous support for sharing this function.
Facility Management	X		Clear and unanimous support for sharing this function.

ILLINOIS
UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Factors to Consider for Partnering Arrangements

1. Physical proximity of the units

2. Type of research that is performed (primarily experimental or primarily theoretical)

3. Natural affinities due to the academic nature of programs

4. Inter-personal relationships among departments and staff

5. Centers of excellence (some units may perform certain service better than others)

Possible Shared Support Structure
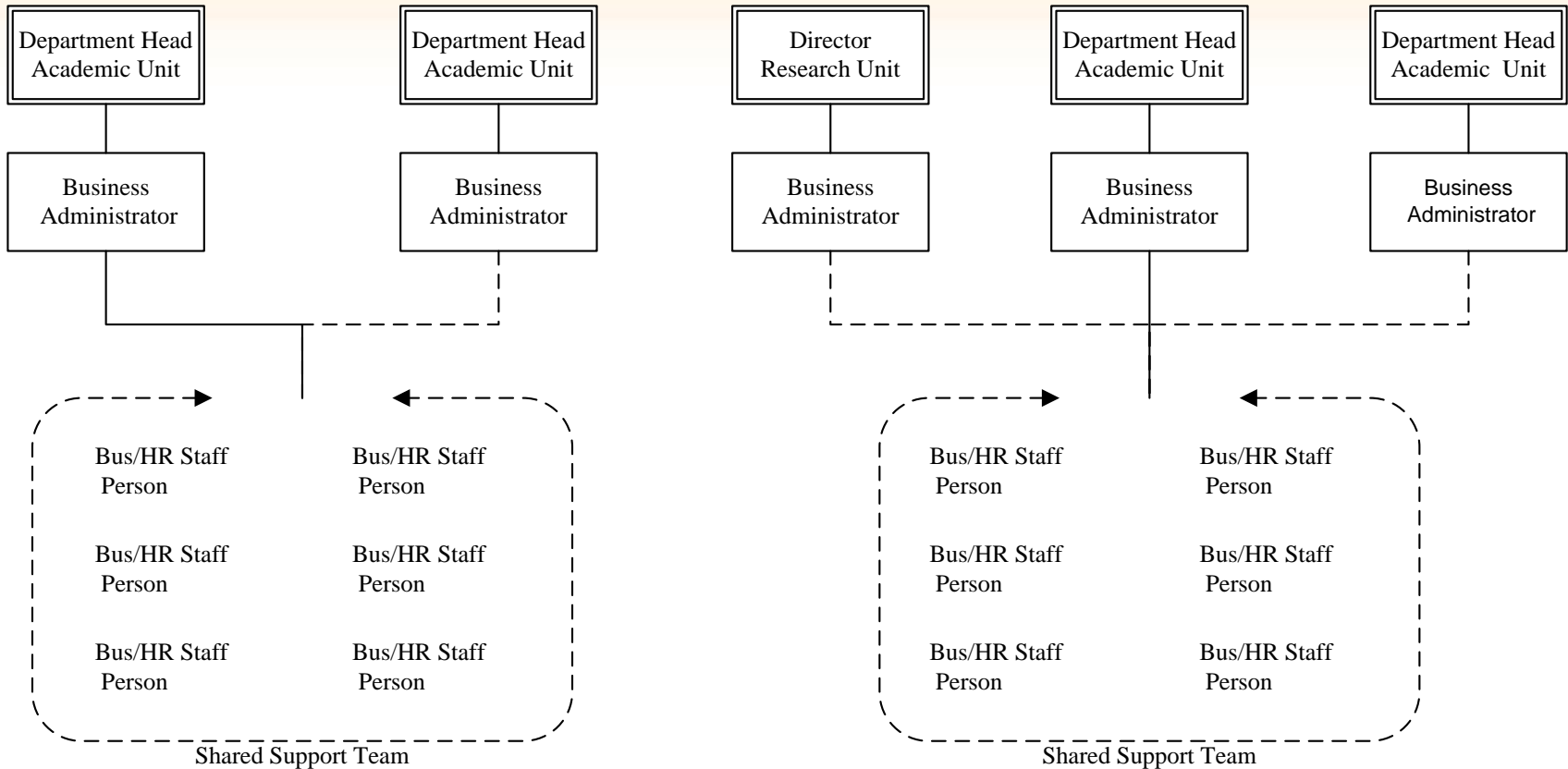
Some Conclusions

- Smaller departments have no capacity for absorbing additional work

- HR functions generally can be moved into a shared support center

- Most accounting and grant administration functions thought best to be in units

- Purchasing activities could be consolidated with efficiency gains with the right IT infrastructure in place

- Clear need for facilities, safety and some IT support from a shared resource

- Partnering arrangements could be beneficial:
  - Large with small
  - Physical location
  - Similar work