

To: Chancellor Parnell, Provost Runge, VCAS Buchholdt
From: Debbie Craig, Amanda Yauney - Co-Chairs of SS Migration Comm
CC: Committee – Cathy Hviid, Sabrina Haverfield, Justin Atteberry, Kris Keyes-Gant,
Heather Paulsen, Christine Lidren, Al Grant
Date: May 8, 2024
Re: Shared Services Migration Committee - Final Outcomes

After meeting several leaders across UAA and much discussion, we offer below the proposed work units, the personnel distribution plan, and the proposed timeline. We conclude with areas that need further consideration and/or messaging from the Chancellor.

Proposed Work Units

Based on the [summary of usage patterns \(# of tickets submitted\)](#), the following work units were created that allow the closest workload distribution across all units. You'll see in the linked document that CBPP/SOE/Libr has about half of the workload (number of tickets) as the other 5 work units, but that the other 5 are more closely approximated. The proposed work units are:

- College of Art and Sciences
- College of Health
- Community & Technical College and College of Engineering
- College of Business and Public Policy, School of Education, Library
- Chancellor, Provost, Vice Chancellor of Administration Services, Advancement
- Office of Research

Personnel Distribution Plan

Based on the above-mentioned document of usage patterns, the table below illustrates the recommended distribution plan for: Shared Services (SS) - Fiscal & Human Resources Coordinators (HRCs); Faculty Services (FS); Strategic Budget Officers (SBOs); and Process Improvement/Training positions.

Unit:	Fiscal FTEs	HRC FTEs	Fac Serv FTEs	SBO	Total
Process Improvement/Training	1	1	0	(Brian/Ahmbra)	2
Office of Research	3	2	0	(SPAS Mngr)	5
Chancellor/VCAS/Provost/Advancement	3	2	Marian+1	Vacant SBO	6
CBPP/SOE/Library	2	1	1	Susan	5
CoEng/CTC	4	2	1	Stephanie	8
CAS	3	2	1	Audrey	7
COH	6	3	1(new hire)	Mark	11
Total by Unit	22	13	6 (currently 4)	5	44

SS Positions

Prior to the committee's charge, the Shared Services Director and managers spent time analyzing each of their respective areas and looking at metrics. The Director provided the recommendations to the committee and there is agreement on the committee that the current distribution of both fiscal SS employees and HRC SS employees is as balanced as can be, given the data of work output per employee type, regardless of what factors may or may not be missing in that data.

Supervision

There was consensus that fiscal employees should report to the SBO's. There was discussion among the committee that there is logic in the HRC and FS employees reporting to Directors of Operations or a similar 'chief of staff' type of person in each work unit. Work units will need to ensure that employees retain relationships with peers in other units. Work Units should be prepared with an onboarding plan for their new employees to include:

- Org chart
- Introduction to new supervisor
- Performance expectations
- Any other items that a supervisor and/or work unit would provide to new employees • Access rights (if needed to various systems and drives)

Faculty Services Positions

In discussion with the Chancellor's cabinet, we considered whether Faculty Services (FS) employees were needed in each work unit, given that they did not exist prior to the implementation of Shared Services. The FS positions were created based on an identified gap in work that occurred when SS was created. While the processes in FS and SS can sometimes run parallel, they are not the same duties. Currently, FS employees are hired at significantly higher grade levels than the HRCs. Additionally, prior to SS, if there were positions in the unit that had both FS work and SS work, they

were graded significantly higher than both the current FS and the HRCs, due to the wider scope of responsibility.

Because all SS employees were notified that their position descriptions would not change for a period of 18 months, we don't feel it would be appropriate to combine FS and HRC positions into a new HR Specialist type of employee. After the 18-month period, a work unit could decide to rethink the position description if needed. Thus, our recommendation for the FS allocations in the table above remains unchanged.

Process Improvement/Training Positions

After review of the discussion with the Chancellor's cabinet on April 30th, these two positions are an area that our committee is undetermined whether they are necessary as presented in the table above. Many/All/Most of the committee felt strongly that these two positions are needed. Advantages of implementing these two positions include but are not limited to: standardization of onboarding of new fiscal and HRC employees, dedication to improving fiscal and HR policies and processes, continued training in fiscal and HRC best practices, and liaison between work units and other campus or statewide units. On occasion, these positions may also provide limited back up for critical or time sensitive issues.

Proposed Transition Timeline

5/20 - Soft cutover

- Work Units greet and invite new employees to staff meetings
- Work Units design regular meetings with new staff input
- Work units and SS plan for transition: software waivers, recurring pro-card payments, change travel delegates, change pro-card reconciliation and approval names, redo signature cards, change in HRC TKL assignments, permissions, access (PageUp, LawLogix), access to work unit files/records for completed work
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6/30 - Hard Cutover

- Transition of money from SS to Work Units (Budget office to complete)
- Change supervisors/timesheet approvers, D-Levels, and TKLs in Banner
- Decommission SS website

SS employees are understandably anxious about what unit they will be assigned to. Confirming their placement sooner rather than later is important. We view this as Step 1 in the transition! While it has been proposed that the list of employees and work unit assignment should be shared with both the SS employees and the Deans/work unit leads for their input prior to final assignment, we disagree with this

path. Our concern is that the Shared Services Leadership Team has worked very diligently in the placement of Shared Services employees to work units. Factors that were considered:

- Employee's familiarity with the work unit
- Employee's length of time and expertise in their work
- Consideration of institutional knowledge; pairing new and experienced employees when possible
- Temperament/work style of both the employee and the work unit staff/leadership

If we allow others who are not aware of these factors to provide their input, the trauma to our SS employees could be exacerbated. The list of placements has been created with significant care and we believe is the best arrangement for all parties. Our request is to not 'open this can of worms' again, by allowing others to say "no" to an employee's placement.

SPAS Considerations

While the initial charge to this committee did not include making recommendations on SPAS, the committee felt that making recommendations on SS ultimately impacted SPAS and workflow; and therefore, offers the following considerations:

- The committee felt similarly torn, as did the Chancellor's cabinet - we could see it working/failing with either choice of having SPAS remain with full services on fund 2 activities; or transitioning out of the SPAS model and distributing employees to work units.
 - Given the directive that the committee cannot offer solutions that require the addition of further staff lines, it is difficult to suggest that SPAS stays intact and actually takes on more work toward full fund 2 services.
 - Since adding more SPAS positions is not a likely solution, the committee recommends either dissolving SPAS or letting each Dean decide their preference and what works best for their business model. This could include:
 - Transitioning SPAS employees and work back to the work units at the same time that these other SS and FS transitions are occurring. The benefit of transitioning them at the same time is that all new employees will be arriving in the work units at the same time and thus part of the new team building exercises. People on our committee who already work with the SPAS employees believe this would be best, and that these employees already know this is a possibility.
 - Having the employees remain in SPAS and then OR would be responsible for those units (i.e. - contracting solution) and the workflow. The benefit of having members remain is that fund 2 can be highly specialized needing a different knowledge and skill sets than are currently in the Colleges or SS.
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Workflow Considerations

1. Development of the ticketing system - TDX - centralized model with IT oversight.
 2. Backfilling SS/FS vacancies - current and future SS and FS position searches will be for Term positions, rather than permanent positions. This was relayed to the committee after our meeting with the Chancellor's cabinet. The committee feels that permanent positions are more desirable and would garner a more robust applicant pool.
 3. All Deans/work unit leads need to create an onboarding plan, where conversations about expectations, communication styles, and workflow processes can be conducted, among other items for discussion.
 4. Recommendation to hire two new Faculty Services lines.
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Recommendations for Written Guidance from Chancellor

With the above outcomes, we suggest that the Chancellor provide a written memo to all affected employees (SS and work units) with further guidance. Items to include at a minimum are:

1. Inclusion of transitioned employees with regular work unit staff meetings.
2. Biweekly meetings with Strategic Budget Officers with transitioned staff.
3. Clear definition of reporting lines between Deans, SBO's, Director of Operations and the Budget Office.
4. Reassessment of the distribution of the FTE's at 6 months.
5. Colleges and work units will provide written onboarding plans for new employees to include:
 - How they will integrate employees with existing team(s)
 - Performance expectations
 - Professional development/training expectations and opportunities
 - Leave request process
 - Plan in place to avoid single points of failure.

We appreciate the opportunity to serve the University and the Chancellor with this important committee! Please feel free to contact us if we can be of further assistance.