**CLAS Concept for a Shared Service Center**

**Introduction**
The college includes approximately 40 departments and centers, employing over 900 faculty and staff. The staff process over 61,000 transactions annually and support the HR functions for approximately 3000 faculty, staff and graduate students. The total CLAS budget for administrative staff support is approximately $5.2 million.

Discussion of adopting a shared service model has been driven by two problems confronting the college. First, the distributed model requires a large number of generalists spread around the college, each of whom must master a broad range of skills and manage a multifaceted workload. The heavy demands placed on these generalists lead, in some cases, to ongoing problems, both in the ability to adequately complete all tasks and in employee satisfaction. Recent staff reductions due to budget cuts put even more stress on this model. Second, the budget situation leaves us looking for ways in which we can find more money to devote to the core missions of teaching, research, and service. A natural question is whether moving—at least in part—from a generalist to a specialist model and pooling some tasks across units might provide better service at lower cost. We began evaluating whether this might be true and how we would achieve these goals in early 2011.

This document summarizes the plan developed to date. We are currently reviewing the specific proposals outlined here to evaluate whether to go forward with implementing a shared services model.

**What are Shared Service Centers (SSCs)?**
Shared Service Centers are organizations tasked with carrying out a specific set of administrative tasks, and of doing so with efficiency, expertise, and high commitment to customer service. Employees in a shared service center cover one task (or a number of related tasks) for multiple units. The SSC model is intended to:

- Improve quality by having staff members specialize in certain kinds of transactions.
- Empower staff by creating opportunities for advancement within the organization, rather than only by leaving it.
- Reduce costs through specialization and by pooling work from multiple units so that economies of scale can be achieved.
- Increase the opportunity to cross train specialists, minimizing the disruption when a particular individual is not at work.
- Ensure that tasks for which unit-level knowledge is crucial remain at the unit level.

**Information Gathering**
Relevant information was gathered through extensive interviews with CLAS staff, administrative leaders in other colleges and administrative units, a sampling of department chairs, meetings with small groups of staff, meetings with other UF shared service centers, official metrics from Finance & Accounting, job descriptions, literature related to other universities’ implementation of SSCs, and HR-related activities. Department Chairs and Center Directors were introduced to the concept in Chairs/Directors meetings. In addition, meetings to discuss the concept have taken place in the Finance Committee and in Divisional Chairs/Directors meetings.
Expected Benefits
For Faculty & Departments

- Timely and improved service for processing and completion of all HR and fiscal transactions transferred to the CLAS SSC
- Improve workflow electronically thereby removing some of the “paper” and the “walk-to-talk”
- Accountability to faculty groups; the expectation is that a small group of staff will serve a pre-designated group of faculty
- Easy identification of who does what
- Support to staff remaining in departments for peak busy periods and for back-up
- In later phase, improved expertise and efficiencies in grants’ management

For Staff

- Opportunity for staff to become experts in their chosen field
- Cross-training of staff to prepare them for promotion
- Promotion opportunities for staff within the SSC structure, same college or inter-college

For CLAS

- Consistency in processing transaction, knowledge & interpretation of policy/procedures, timeliness
- Improved data security
- Improved retention of records
- Savings to be reinvested in core missions

Activities identified for consolidation

Fiscal
PCard transactions
Expense Reports
Vouchers
Purchase Orders
Budget reports and management oversight of budgets
Specialized reports for units
Reconciliation of transactions as prescribed in UF directives
Fellowships, waivers and scholarships for graduate students

HR
Epaf entries
VISAs
Appointments-staff, faculty, and graduate students
New employee forms processing
Payroll distributions and retros
Activities identified for consolidation, continued

Grants (initially, units without grant support)

Pre-award
Compliance
All expenses
Reconciliation
Reports for PIs
Post-award

General
Back-up to departments

Activities to remain in the unit

Course Scheduling
Reception
Search Committee support
Grades
Textbook adoption
Departmental event coordination
Graduate Student recruitment and processing to the point of appointment
Place orders for purchase
Receive receipts and packing slips
Asset and space management
Time approval
Grant activity in larger units until Phase IV

Implementation - Suggested

Implementation would take place in staggered phases, to strike a balance between the disruption caused by a “big bang” approach and the complications of a gradual approach. Implementation should also minimize the job insecurity felt by staff members and maximize our ability to retain our best staff members. Each stage will present challenges both for the smooth running of the units and for a smooth transition for employees. For units and the college, the challenge will be to adjust to the new system with a minimum of “dropped balls.” For staff, we will face three overlapping challenges:

- Giving current CLAS employees the opportunity to compete for jobs in the SSC.
- Ensuring that staff remaining in departments have manageable workloads.
- Giving staff whose positions will be eliminated the maximum time and support to locate other employment.
The draft implementation plan aims to make the process more manageable by breaking it into four phases:

**PHASE I**
Units: AAC, Anthropology, Bob Graham Center, CES, Classics, CWOC, Dean’s Office, English, Geography, Linguistics, LLC, Oral History, Philosophy, Sociology/Criminology, Spanish/Portuguese, Statistics, UWP, and Women’s Studies.

Total Current Administrative Staff: 50.5
Projected to remain in units: 33
Projected Shared Service Staff: 5
Projected positions lost: 12.5
Projected Salary Savings: $655,135

Total Fiscal Transactions: 7,523
Total HR Transactions: 1,300
Faculty: 288
Graduate Students: 681
Majors: 3,451
Grants: $4,935,630 (52)

**PHASE II**

Total Current Administrative Staff: 18
Projected to remain in units: 10.5
Projected Shared Service Staff: 2
Projected positions lost: 5.5
Projected Salary Savings: $260,816

Total Fiscal Transactions: 4,683
Total HR Transactions: 800
Faculty: 157
Graduate Students: 385
Majors: 1,794
Grants: $3,403,463 (37)

**PHASE III**
Units: Astronomy, Biology, Chemistry, Geology, Physics, Psychology

Total Current Administrative Staff: 52.1
Projected to remain in units: 30.1
Projected Shared Service Staff: 7
Projected positions lost: 15
Projected Salary Savings: $718,827

Total Fiscal Transactions: 37,853
Total HR Transactions: 1,425
Faculty: 215
Graduate Students: 735
Majors: 3,799
Grants: $29,225,003 (345)

PHASE IV
Transfer all remaining grant activity into the Shared Service Center.

Total Current Administrative Staff: 7
Projected to remain in units: 0
Projected Shared Service Staff: 5
Projected positions lost: 2
Projected Salary Savings: $98,444

TIMELINE
April 2012: Decision on whether or not to implement SSC

PHASE I
May 2012: Identify planned changes for Phase I
Post job openings for the SSC
Prepare office for SSC including furniture and computers.

May/June 2012: Finalize hires for the SSC and coverage plans for affected units.

July 2012: Issue layoff notices to affected employees.

July 2012: Initiate transfer of transaction activity.
Conduct necessary training.

August 2012: Complete Phase I Implementation

PHASE II November 2012-February 2013

PHASE III May-August 2013

PHASE IV November 2013-January 2014