WHAT WE WILL DO TODAY

/ How Today Will Work

/ Background

/ WVU Shared Services Center

/ Current Activities and Next Steps

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HOW TODAY WILL WORK

/ Hear from Paula and Lisa

/ Open question-and-answer session
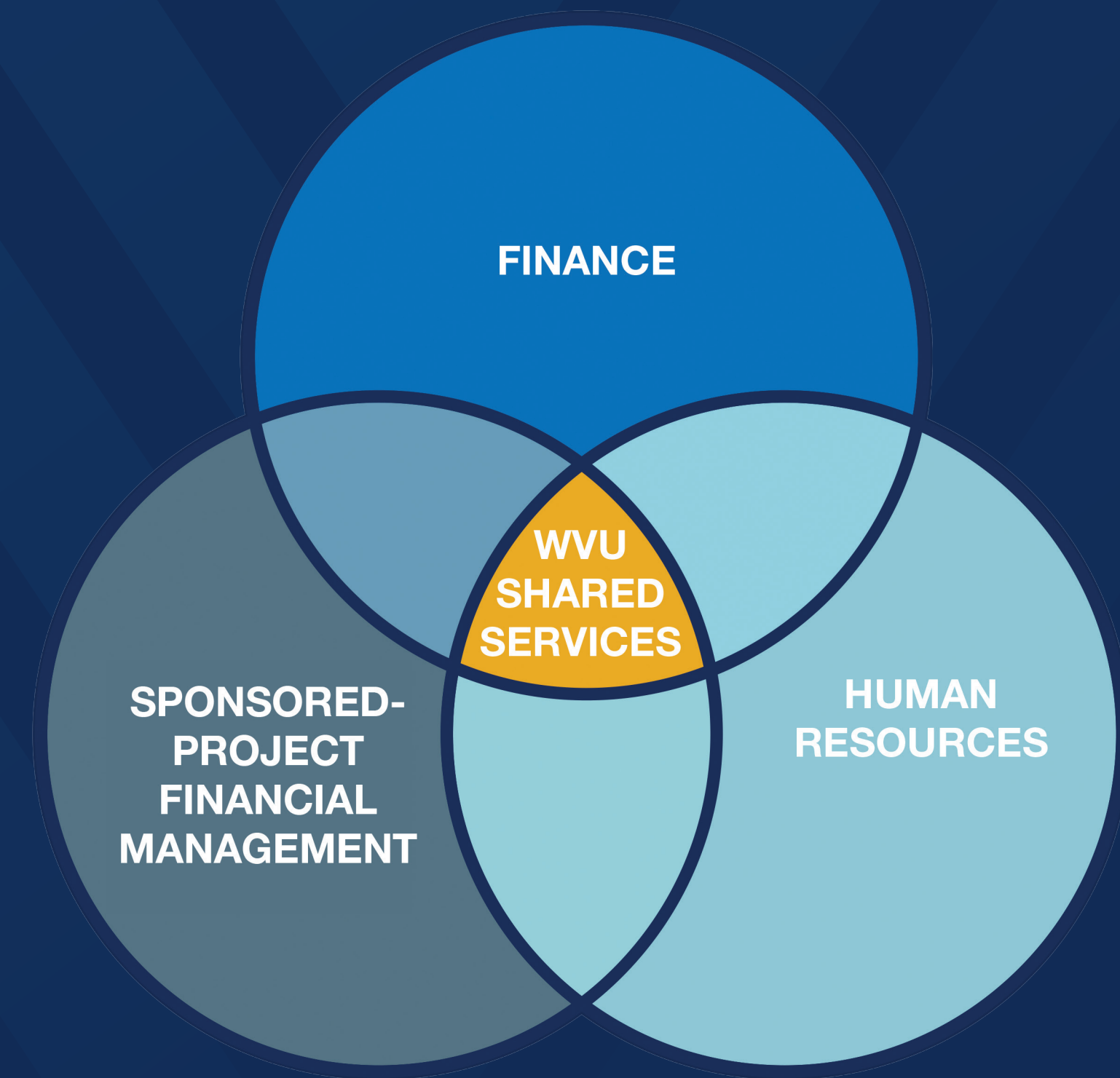
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WHAT IS SHARED SERVICES?

/ Shared services is a **service-delivery model** that involves the integration of certain operations that support multiple parts of the same organization.

/ A designated **single point of contact** (i.e., front door) typically is defined for clear communication between a Shared Services organization and its customers.

/ Shared Services organizations exist at many other **higher education institutions**; however, no two models are exactly the same.

/ Some Shared Services organizations in higher education focus on service delivery for a specific function (e.g., payroll or human resources), while others are designated for certain areas of an institution (e.g., a particular college, school or program).

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WVU SHARED SERVICES PROJECT

/ The WVU Shared Services project developed in spring 2016 out of the **Transformation Through Innovative Business Practices** initiative.

/ An assessment of work activities across WVU was completed in fall 2016, which reported:

/ Service and support often are fragmented and not standardized.

/ There was duplication of work between units.

/ Transactional work was highly distributed among positions — even those positions with a more strategic focus.

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WVU SHARED SERVICES PROJECT

/ Since the assessment, a small team has worked with individuals across the institution to review policies and procedures and develop an implementation plan to **reduce duplication of work** and **improve customer service**.

/ The plan became the **WVU Shared Services Project**, which focused on the areas of **human resources**, **finance** and **sponsored-project financial management**.

FINANCE

WVU SHARED SERVICES

SPONSORED-PROJECT FINANCIAL MANAGEMENT

HUMAN RESOURCES

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VISION AND GOALS

VISION STATEMENT

Redesign business support activities with the infusion of technology and data accuracy to empower our workforce, resulting in trusted and timely customer service.

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VISION AND GOALS

GOALS

/ Improve **customer service** to faculty and staff — allowing them to focus on teaching and research.

/ Create **efficiencies in systems and processes** and allow employees to become experts in specific areas instead of partially supporting various functions.

/ Eliminate **duplication of services**.

/ Provide tools — such as a digital location (knowledge base) and online community — for all guidance on activities related to **human resources**, **finance** and **sponsored-project financial management**.

SERVICE-DELIVERY MODEL

/ WVU Shared Services will:

/ Offer faculty and staff a **clearly defined means** to **access support** for the areas of **human resources**, **finance** and **sponsored-project financial management**.

/ Enhance and extend support — faculty and staff will be able to access **live assistance Monday** through **Friday**, from **7 a.m.** to **7 p.m.** via **phone**, **email**, **online chat** and **walk-up support** (i.e., **Shared Services storefronts**).

/ Provide an **online community** available **24/7** to submit **service requests**, access **frequently asked questions** and share information through a **digital library** and **chat groups**.

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SERVICE-DELIVERY MODEL

/ The WVU Shared Services-Delivery Model comprises:

/ **Centers of Expertise**, which will provide University-wide strategic, programmatic, planning and governance activities.

/ **HR Partners**, **Strategic Business Partners** and **Grants Managers**, who will serve as resources embedded in units to provide advisement to planning unit administrators and principal investigators in the areas of **human resources**, **financial planning**, **forecasting**, **budgeting** and **post-award activities**.

/ The **WVU Shared Services Center**, which will focus on **customer care** and **transactional support** in the areas of **human resources**, **finance** and **sponsored-project financial management**.

/ Each of these groups will partner with the others to form an overall **system of support**.

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WVU SHARED SERVICES CENTER

/ The areas of the WVU Shared Services-Delivery Model include:

> / **Customer Care**.
>
> / **Workforce Administration**.
>
> / **Financial Management**.
>
> / **Sponsored-Project Financial Management**.
>
> / **Operational Excellence**.

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CUSTOMER CARE

Jameeta Lewis
Director of Customer Care

/ The **Customer Care** team will assist with employment and business-support activities, including:

/ Answering general questions about **payroll, benefits**, **externally funded awards**, **employment**, **funding information**, **changes to employee accounts**, **I-9 employee processing**, etc.

/ Assistance in **making purchases** or **reconciling PCard transactions**.

/ Connecting functional experts with customer requests when a request or resolution is outside the scope of the **Customer Care** team.

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WORKFORCE ADMINISTRATION

Sheila Seccurro
Director of
Workforce Administration

/ The **Workforce Administration** team will manage transactional activities related to the full-employee lifecycle, including:

/ Creating **requisitions** in **Taleo**, drafting **offer letters**, **pre-screening candidates** and overseeing **onboarding processes** for new employees.

/ Administering **benefit-enrollment processes**.

/ Keying information in **MAP**, such as **new positions set-up**, **assignment changes**, **supervisor changes** and **benefits deductions**.

/ Maintaining **employee personnel files**.

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FINANCIAL MANAGEMENT

Stenja McVicker
Director of
Financial Management

/ The **Financial Management** team will support the review, approval and processing of various financial activities, including:

/ **Reviewing** and **approving transactions** submitted through **Mountaineer Marketplace** and **MyExpenses**.

/ **Reconciling funds** and **distributing financial reports**.

/ **Reporting unrecorded assets/liabilities** on a quarterly basis.

/ Overseeing **timecard submissions** and **working with supervisors** to ensure time is submitted and approved.

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SPONSORED-PROJECTS FINANCIAL MANAGEMENT

Not pictured:
Vince Alvarez
Director of
Sponsored-Projects
Financial Management

/ The **Sponsored-Projects Financial Management team** will manage post-award transactional financial activities, including:

/ Reviewing and approving **purchases** on **externally funded awards**.

/ Reconciling **externally funded awards** and distributing **monthly reports** to principal investigators.

/ Processing **financial data related to grants** (e.g., billing and invoicing of sponsors), reconciling **award expenses** and initiating **cost transfers**.

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OPERATIONAL EXCELLENCE

Rich Cortellini
Director of
Operational Excellence

/ The **Operational Excellence** team will provide accountability to our customers by:

/ Monitoring **case submissions** and **resolutions**.

/ Reporting **case statistics** to units.

/ Reviewing **processes**, **procedures** and **knowledge base** articles on a consistent basis.

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WVU SHARED SERVICES CENTER: FACILITIES

/ The primary location of the **WVU Shared Services Center** will be the **third floor** of **One Waterfront Place**.

/ At this location, customers can receive assistance via **phone**, **email**, **online chat** and **walk-up support**.

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WVU SHARED SERVICES CENTER: FACILITIES

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WVU SHARED SERVICES CENTER: FACILITIES

/ The **Shared Services Center storefronts** will be located on:

   / The **ground floor** of the **Mountainlair.**

   / The **first floor** of the **National Research Center for Coal and Energy building.**

   / The **ground floor** of **Health Sciences South.**

/ Initially, faculty and staff located outside of our Morgantown campus will be able to contact the **Shared Services Center** via **phone**, **email** or **online chat**.

/ In late spring 2020, **WVU Institute of Technology** and **WVU Potomac State College** will operate **storefronts** out of existing locations that handle business-support functions.

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WVU SHARED SERVICES CENTER: TECHNOLOGY

/ The **WVU Shared Services Customer Care Community** is a **24/7 online resource** with **robust search capabilities**.

/ This system is built upon the **Salesforce** platform and will be used by faculty and staff to **submit** and **track requests** (and reference requests after they are resolved).

/ The **Customer Care Community** will be accessed via **portal.wvu.edu** or the **WVU Shared Services** website (**SharedServices.wvu.edu**).

/ For **technical support** of **WVU systems** and **services**, faculty and staff should continue to contact the **WVU ITS Service Desk** or the **HSC ITS Help Desk**.

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WVU SHARED SERVICES CENTER: TECHNOLOGY

CURRENT ACTIVITIES AND NEXT STEPS

/ WVU Shared Services currently is:

/ Working with our partner groups to define **step-by-step procedures** for activities supported by the **WVU Shared Services Center**.

/ Drafting and refining **knowledge base articles** and **testing workflows** in the **case-management system**.

/ Completing **training** activities for **internal staff**.

Note: Training sessions for the broader WVU community will begin in January and include customer training on using the **case-management system** and **knowledge base**.

/ Planning for **"go-live" activities** in early 2020.

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CONTACT INFORMATION

/ Visit **sharedservices.wvu.edu** for more information.

/ Contact the Shared Services team at **sharedservices@mail.wvu.edu** with any questions.

/ An archived version of this Campus Conversation will be available at **bureaucracybusters.wvu.edu/campus-conversation**.

/ You may continue to submit questions to **campusconversations@mail.wvu.edu**.

/ Stay tuned for upcoming Campus Conversations.

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