EVOLUTION OF A SHARED SERVICES CENTER

FOCUS ON EFFICIENCY

It was decided that many of the distributed services could be combined in one service center that could deliver consistent quality of service.

Berkeley needed an administrative structure that was scalable, nimble, and allowed us to remain competitive.

The distributed model of administrative operations at UC Berkeley had evolved over time with little or no guidelines. The result was multiple operational challenges including highly dispersed administrative functions, varying types and quality of technology used across campus, inefficient or redundant processes, and fragmented quality control. These challenges resulted in problems such as service disparities, a tendency toward reactive, ad-hoc solutions, and a high administrative burden on faculty and staff in departments.

The objectives of establishing a campus shared services center were to simplify and standardize certain common administrative tasks and processes across the entire campus; direct more resources toward Berkeley's teaching, research, and public service mission; and meet the unique needs of departments, labs, units, and the campus by drawing from the expertise of staff and faculty. Campus Shared Services (CSS) was a collaborative design effort meant to serve all departments and colleges on campus; engage academic and administrative leaders, faculty, staff and students in design; move sharable work to one shared services center; and include sharable work in the areas of HR and Academic Personnel, Business and Financial Services, Information Technology, and Research Administration.

The physical location of the CSS is about 2.5 miles from the campus. Approximately 2/3 of the staff are located there and about 1/3 are located on campus (Research Administrators, Desktop Support, Satellite Services Offices). It is a matrix organizational structure with leadership for the four functional areas and leadership to ensure service delivery across functional boundaries. The implementation approach was to move work as is into CSS. Approximately 500 staff who performed 50% or more "sharable work" transitioned into CSS.

Engagement with campus units began 5-6 months in advance of transition to prepare the unit for the transition and to understand the work that the unit would be bringing into CSS. The transitioning into CSS occurred in phases. The campus was grouped into cohorts based on like needs. The funding model that supports the center was a collaborative effort on the part of Campus Executive Leadership, CSS, the Campus Budget Office and the Deans.

MILESTONES

2015
- Focused on improving operations > people, processes, technology

2015

2013
- Transitioned in all campus units (~95%)

2013
- Go live with administrative units – first IT, followed by B&FS and HR
- Go live with first academic cohort

2012
- Developed method and tools to reassign staff and work
- Began hiring functional directors
- Decided on "day 1" processes

2011
- Hired executive director for implementation project
- Developed service menu
- Began development of funding model

QUANTIFICATION AND RESULTS

All staff and faculty have access to the IT Service Desk for application support and desktop support.

CSS is processing all procurement and travel and entertainment reimbursement transactions with fewer FTE than the decentralized model prior to CSS.

CSS staff have more opportunities for advancement within the unit than they may have had previously.

CSS IT has demonstrated stabilized operations in FY 2016 by increasing staffing by only ~20% and the same time maintaining a high customer satisfaction level.

OPPORTUNITIES AND SOLUTIONS

At the start of CSS, VCAF John Wilton stated that we would review the funding model once the implementation project was complete. We are now at the time to review and we have some experience with a shared service center that can better inform our vision of a shared service center in the future. We may decide that some activities in the shared service center would be better completed locally and other activities that were not considered for CSS before should move to CSS. The campus has asked CSS to take on some activates that would require a pay-as-you-use aspect to the funding model. And perhaps we should look at the providing varying levels of services (e.g., bronze, gold, platinum) so that departments that have a need for a higher level of service can pay for a higher level of service.

IMPACT AND BENEFIT

The impact to the campus has been significant. The change has been quite disruptive for units across the campus as some of their staff and some of their work has transferred to CSS leaving gaps in their daily operations. Many units tend to look only as far as filling gaps based on the way things were done in the past rather than thinking more strategically about how they will fulfill the mission of unit in the future. In addition, the redesign of processes that standardize our work and allow for customization where needed take time and effort. The delay means that the campus may not yet be getting the service they expected from CSS.

LESSONS LEARNED

1. This is a transformational change that takes many years to complete.

2. Campus engagement requirements were and still are, substantial.

3. Ongoing participation of leadership was, and still is, critical.

4. There is a cost to transitioning in non-standard processes.

5. Ensure clarity on the backlog of work that will transition to CSS with each unit.

6. Hire directors, managers, and supervisors earlier.

7. Manage expectations; don't promise more than can be delivered.

PROJECT TEAM

Executive director

Project manager

Project coordinator

Process analysts

Communications

Change management (including training)

Facilities manager

Outside consultants as needed to help specific problems