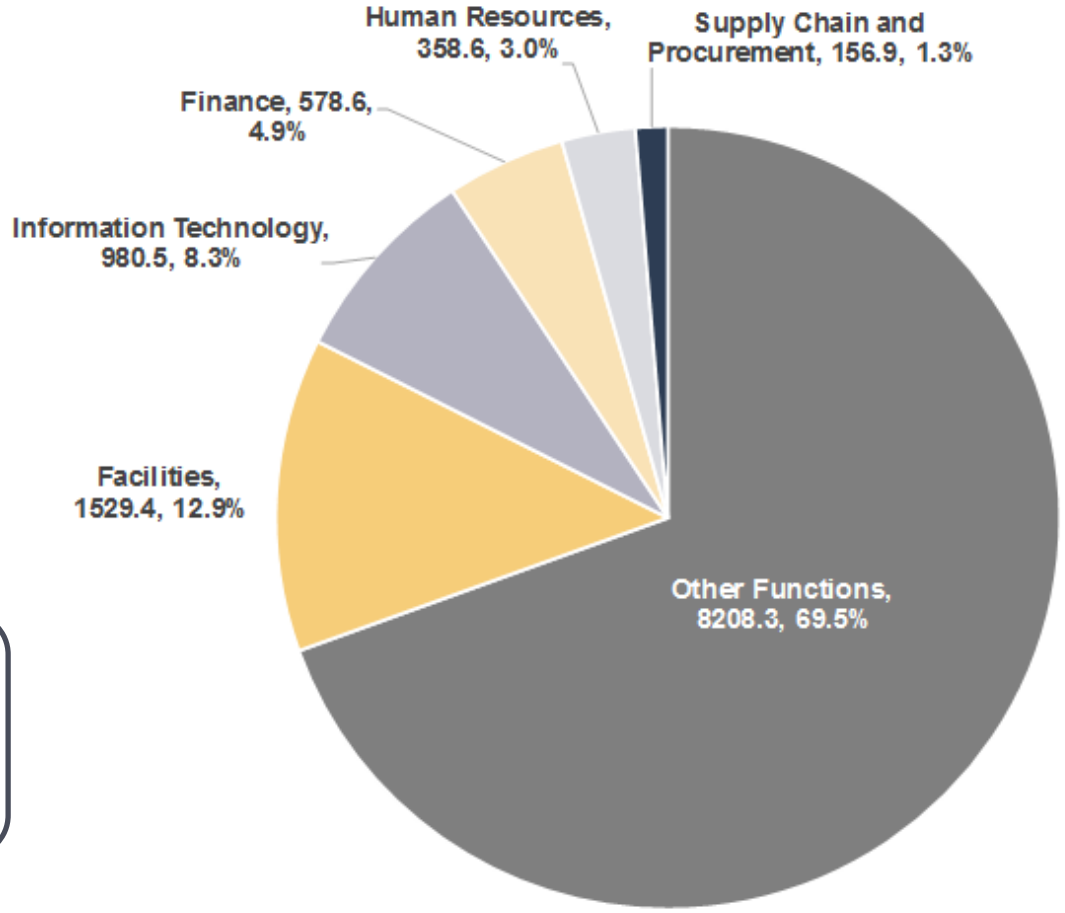
Informing Collaborative Design

Systemwide Activity Analysis Results by Function

#	Administrative Assessment Functions	Sum of FTE	% of FTE	Sum of Gross Salary (m)
1	Facilities	1529.4	12.9%	$59.9
2	Information Technology	980.5	8.3%	$53.3
3	Finance	578.6	4.9%	$29.8
4	Human Resources	358.6	3.0%	$18.7
5	Supply Chain and Procurement	156.9	1.3%	$6.7
Admin Review Area Totals		***3,604***	***30.4%***	***$168.4***

The Functions from the Administrative Review Assessment comprise of 3,604 FTEs – approximately 30% of the overall workforce effort

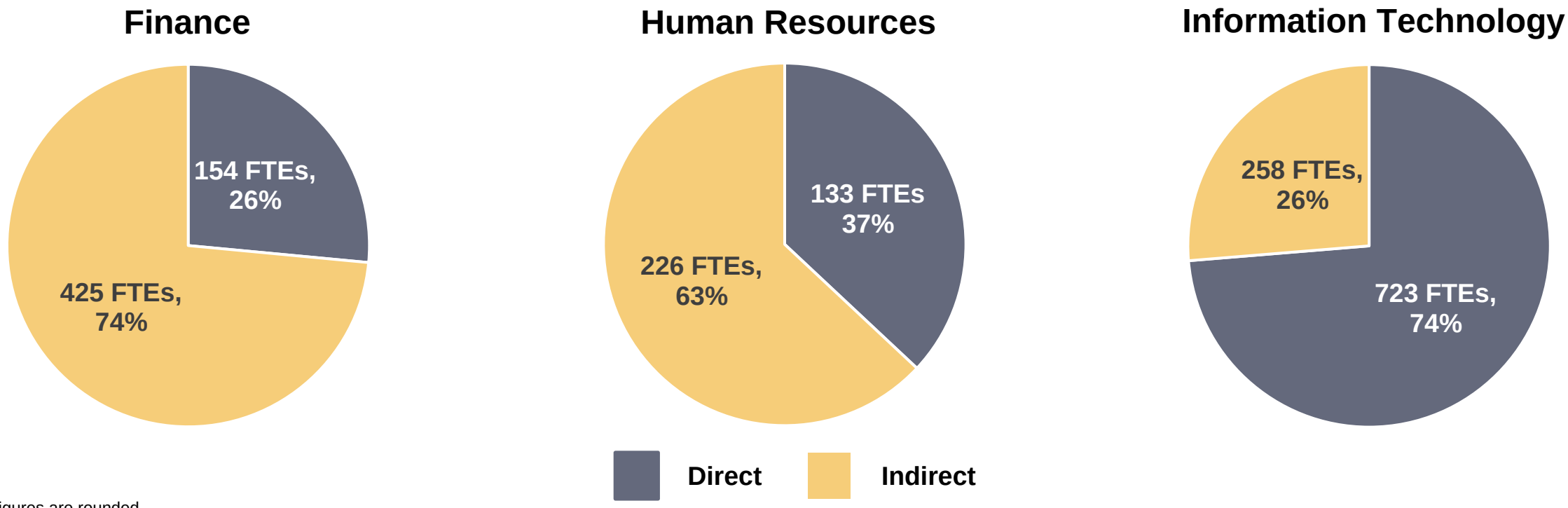


- Student Affairs and Services, Research and Economic Development, Clinical, Academic Affairs, General Administration, Auxiliary Services & Business Operations, Enrollment Management, Community Service and Extension, Teaching, Communications and Marketing, Intercollegiate Athletics, University Advancement, Libraries and Museums, Diversity, Equity, and Inclusion, Printing and Publishing, Legal, and Real Estate Services. Does not total due to rounding

Activity Analysis- Direct and Indirect FTEs

Finance and HR work is largely distributed, while the majority of IT work is performed by employees within a Chief Information Officer's (CIOs) reporting line (direct)

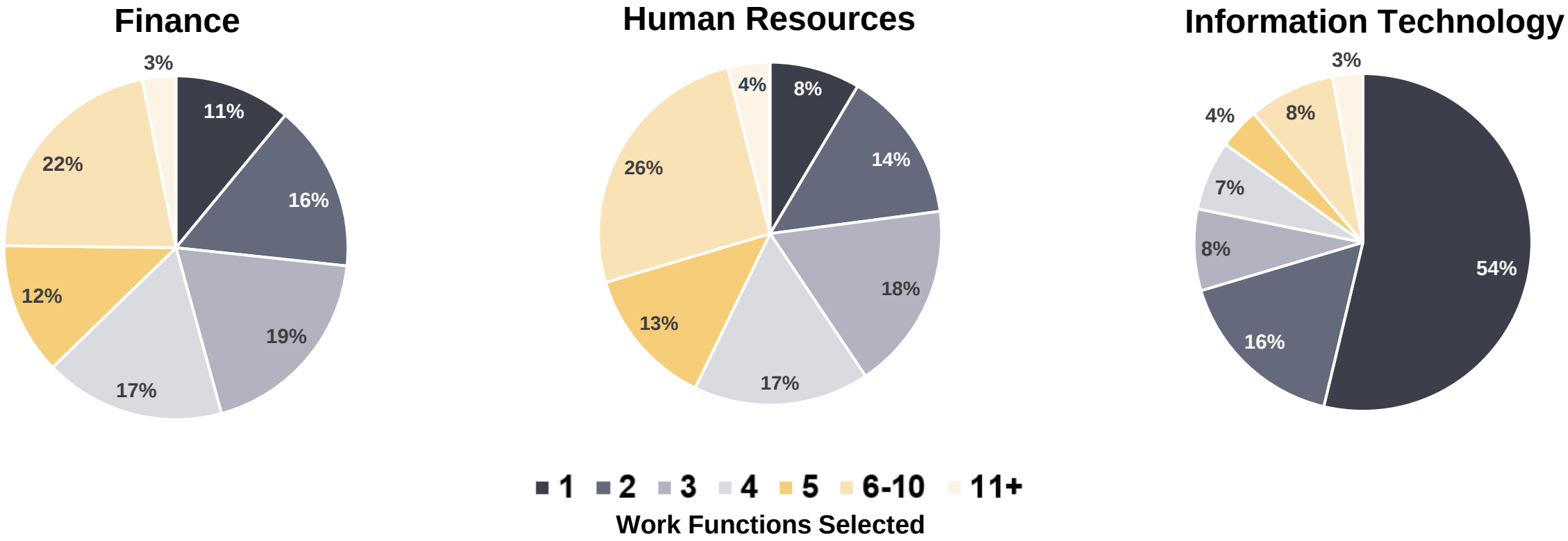
Direct: Staff organized directly within the reporting line of their respective C-Suite (CFO, CHRO, CIO)
Indirect: Staff performing Finance, HR, or IT work outside of direct functional reporting lines



Note: Figures are rounded.

Activity Analysis- Finance, HR and IT Functions Performed

The majority of staff performing HR or Finance activities typically work across multiple functional areas, whereas those performing IT activities mostly work within one functional area



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Voice of the Customer Survey

- A sample of the University community representing users of finance, human resources and information technology services shared feedback on these services at the University.
- In evaluating Finance, HR and IT services, respondents provided feedback on:
  - Importance
  - Effectiveness
  - Quality
- Respondents represented all units within UM System, as well as multiple levels of the organization and a range of departments.

Organizing Administrative Services in the Future

Strategic Campus Partners	Centers of Expertise (COE) *Policies, methods and tools*	Shared Services (SS) *Transaction processing service support*
• Strategic activities focused on planning, problem-solving and enabling the University objectives (not transactional) • "Pulls through" Shared Services and Centers of Expertise where needed • Driven by relationships and requires strong understanding of the business • Campus Partners are aligned to campus / units	• Translates functional strategy into policies and processes and business rules • Requires deep subject matter, functional and / or business expertise • Resolves issues escalated from Shared Services • Leaders typically have smaller span of control	• Transactional, repetitive, high volume without "in person" contact • Guided by well-defined, automated processes and / or business rules • Documented and can be taught to others • Generally resources are co-located and / or operate virtually • Leaders typically have greater span of control

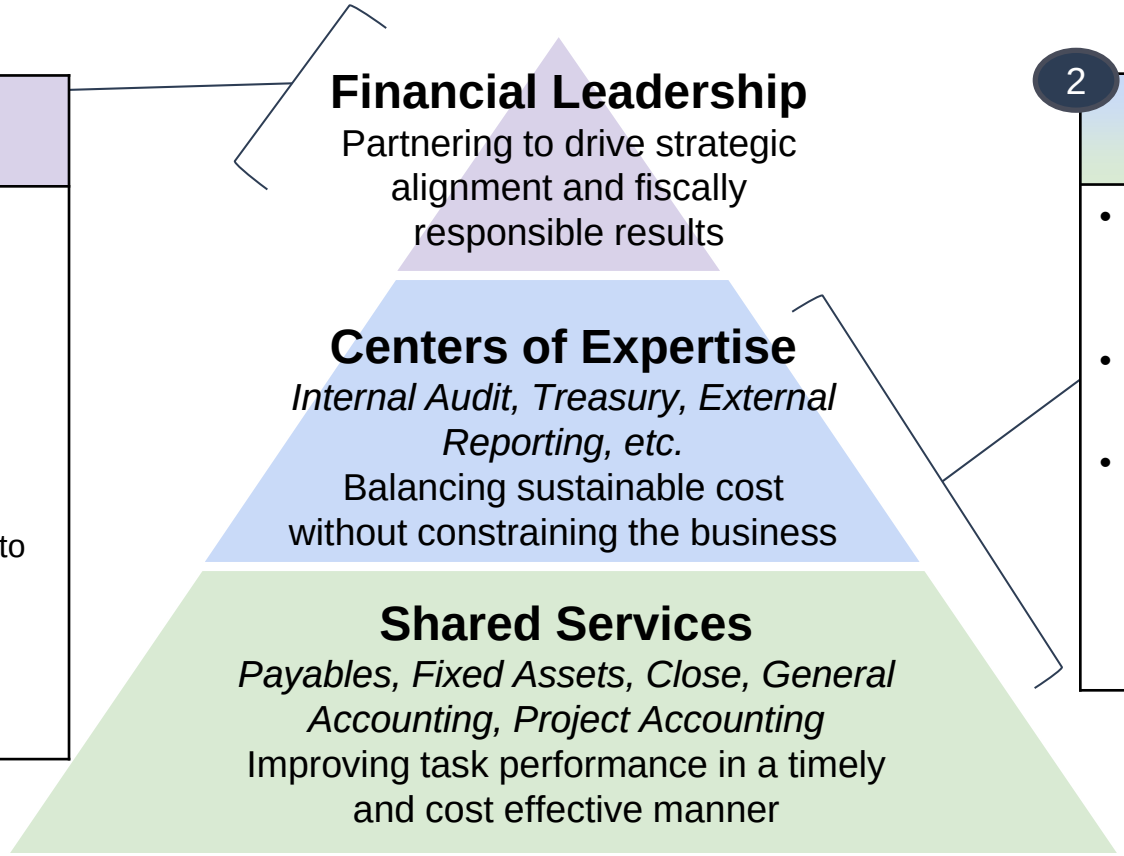
Finance

The University's challenge will be addressed by two, mutually dependent initiatives

1

Financial Accountability / Fiduciary Responsibility

- Finance must participate in the new process to deliver fiscally responsible results
- Shared financial performance goals among financial and academic / operational leaders
- Metric-based approach
  - Relevant and accurate data is critical to making Accountability successful
- Consistent approach throughout the organization, but flexibility amongst leaders to set the goals



2

Redesigned Operating / Service Delivery Models

- Transforming the organization to more specialized labor and better leverage process automation and simplification
- Need to balance insight, efficiency and control
- Conceptual finance service delivery model:
  - ✓ Shared Services
  - ✓ Centers of Expertise
  - ✓ Finance Leadership (Strategic Campus Partners)

Finance - Mission, Vision, Values

Finance Role Statement

Serve in a University-wide leadership role to deliver fiscally responsible results and drive value as a strategic business partner for the organization. Work to align our resources consistent with the mission and priorities of the University of Missouri System and its campuses.

Finance Critical Behaviors

LEADERSHIP / STEWARDSHIP

Partner / team to achieve fiscally responsible business results - Develop and maintain professional credibility and trusted relationships with stakeholders while managing risk and making fiscally responsible decisions

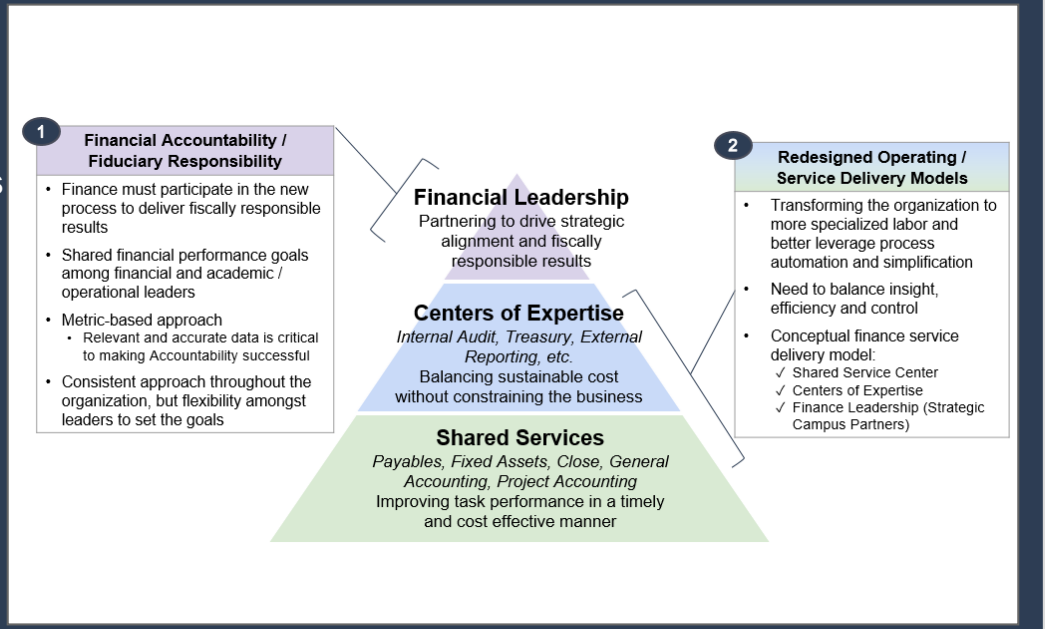
VALUE

Demonstrate Finance's value as a strategic partner and respectfully challenge the status quo to drive results and create better ways of working

SERVICE

Collaborative and Courageous – Engage in a 2-way dialogue and co-develop solutions with the institution, and proactively encourage innovative ideas and new ways of thinking to solve problems

Finance Strategic Dimensions



Finance System-wide Annual Goals (FY18 - FY19)

1. Develop consistent and unified Finance strategy

2. Design optimized Finance Delivery Model (people, process, technology)

3. Drive broader accountability for fiscal responsibility and decision making

Finance Service Delivery Framework

How the institution interacts with Finance

Prioritization Key
- Primary
- Secondary
- Tertiary

Financial Leadership
Strategic Campus Partners

University Leadership

Communication / accountability

Academic/Operational Leadership
- President
- Chancellor
- Provost / VC
- Dean / Director
- Department Chair

communication / accountability

Financial Leadership
- System CFO
- Campus CFO
- College / Department Fiscal Officers

Communication / accountability

Process Prioritization

Procure - to - Pay
- Performance Management*

Other Processes
- Business Analysis
- Budgeting & Forecasting
- Management Reporting
- Internal Charges
- Resource Allocation
- Management and Administrative

* -denotes Supply Chain and Procurement Function from Activity Analysis

Key Takeaways:
- **Fiscal Responsibility:** Interactions between Academic/Operational and Finance Leadership will drive the fundamental change in fiscal responsibility we are targeting at the University - shared fiscal responsibility.
- **Measurement:** Primary priority areas focus on creating a budget/forecast/actual reporting capability that supports a metric based approach to the measurement of fiscal goals

Note: - Functional roles above represent interactions and communication and do not reflect reporting lines or organizational structure.

Key Takeaways from the Collaborative Design Session

Finance

Understanding Finance's Role

- Focus more on financial leadership/strategic campus partner "differentiating capabilities"
- Deliver shared service activities as efficiently as possible
- Partner with respective campus(es)/ school(s)/departments(s), have a deep understanding of the business/strategic goals of that group, and "speak their language"
- Adopt a customer service mentality; staff should feel that they can rely on Finance for questions and support

Opportunities for Adding Value

- Capitalize on economies of scale/shared services to drive efficiency and free-up time for innovative thinking and business insight
- Invest in better technology to enable more effective differentiating capabilities Universitywide
- Simplify processes, especially procure-to-pay cycle and business insight processes
- Better align skillsets of resources to appropriate roles, and provide more training and clear job roles/responsibilities

Human Resources

Human Resources - Mission, Vision, Values

HR Role Statement

Serve as a strategic and trusted advisor. **Support** an inclusive and dynamic culture and workforce. **Pursue** continuous improvement through knowledge, collaboration and leadership.

HR Strategic Pillars

Workforce Planning	**People Development**	**Efficient HR Operations**	**High Quality HR Service**	**Health & Well-Being**	**Culture & Climate**	**Compliance**
Collaborate with leaders to evaluate talent needs, attract top talent and enable multi-year recruiting and succession plans	Strengthen leadership capabilities, promote high performance and a culture of continuous learning and development	Continuously improve HR workflow and leverage HR technology solutions to deliver efficient shared services	Provide our campuses, schools and departments with best-in-class service to enable our institutional goals and academic mission	Offer competitive total rewards packages to attract/retain talent & improve our community's health & well-being	Foster a culture that is inclusive, diverse and collaborative environment that creates an employee experience that inspires excellence in people	Partner with leaders to address employee-related issues and meet internal & external compliance requirements

HR Critical Behaviors

Professional Credibility - Develop and maintain professional knowledge and trusted relationships to ensure sound, credible advice

Collaboration - Engage in collegial, inclusive dialogue to create shared strategic solutions

Leadership - Proactively work across organizational lines to solve problems and drive excellence

“Big Shifts” Required in HR to Enable Strategic Objectives

1. **Introducing new HR Strategic Campus Partner roles**
2. **Expanding HR Centers of Expertise**
3. **Shifting HR transactional work to shared services and “self-service”**

Simplifying and improving our HR processes and policies

Concepts for Organizing HR Services in the Future

HR Strategic Campus Partners

Consultant to business leaders, drives local delivery & execution of system-wide HR strategies and programs including:

- Workforce Planning
- Employee Relations
- Talent development & performance management
- Succession planning
- Org development & learning
- Change Management Execution

HR Centers of Expertise

Policies, methods and tools

Areas listed below represent services that should ideally be delivered via a Center of Expertise model, but do not imply dedicated teams, roles or locations of how services will be delivered

- Recruiting
- Onboarding
- Talent Management
- Learning & Development
- Change Management & Culture
- Employee Relations
- Labor Relations
- Compensation
- Benefits and Retirement
- Wellness
- Diversity & Inclusion
- HR Technology & Workforce Analytics
- HR Strategy and Programs
- Academic HR

HR Shared Services

Transaction processing and service support

- Customer Service Center
- Administrative Processing
- Total Rewards Administration
- HR Reporting
- HR Technology
- Payroll, Time & Attendance

So… What are the “Big Shifts” or Areas of Opportunity in HR?

1 Introducing new HR Strategic Campus Partner roles

Primary Benefits:

- Single point of contact for leader who can proactively plan and triage “people” needs
- Improve communication between units and HR
- Focused on consultative strategic planning and forecasting of HR needs
- Greater consistency in levels of service and quality

Examples:

- Longer-term workforce planning
- Skill gaps and performance management
- Conflict resolution

Existing Success Stories:

- Current campus “HR Business Partner” roles contain some similar elements to proposed “HR Campus Partner” role

2 Expanding HR Centers of Expertise

Primary Benefits:

- Create greater specialization of HR skills to support departmental needs
- Expand candidate pools and reduce time / effort spent by depts and academic resources on recruiting, offer management and onboarding
- Provide greater discipline and clarity on career path opportunities
- Further develop staff skillsets
- Enable University’s employee value proposition

Examples:

- “Full Cycle” Recruiting, Selection, Onboarding
- Training, Learning and Development
- Talent Management
- Organizational Effectiveness and Change Management

Existing Success Stories:

- MU Healthcare full-cycle recruiting for clinicians

3 Shifting HR transactional work to shared services and “self-service”

Primary Benefits:

- Reduce risk for University and employees
- Free up capacity in depts / academic resources
- Reduce HR rework

Examples:

- Leave of absence / FMLA
- Time & attendance
- Non-resident alien taxation
- Employee records management
- Personnel action forms (ePAFs)

Existing Success Stories:

- Retirement self-service tool (“side by side” service)
- MU Core Administrative Processing Services (CAPS)

Key Takeaways from the Collaborative Design Session

Human Resources

Understanding HR's Role

- Enable a culture of "academic excellence" and a "great place to work"
- Support and enable professional development for faculty and staff through defined career pathing
- Provide expertise and serve as an "advisor" on all people-related issues and opportunities
- Weave diversity & inclusion into HR services and ensure accountability of leadership follow through
- Establish consistency in how we deliver HR services for faculty and staff

Opportunities for Adding Value

- Create and maintain a leadership development platform to develop leaders and individuals with high potential
- Define and develop more robust and standardized onboarding and offboarding processes
- Play a more active role in "full cycle" recruiting to attract and retain top talent
- Develop the capability to support the organization in this transition, specifically around work/job design
- Proactively identify recruiting and development needs from a workforce planning standpoint

Information Technology

Information Technology - Mission, Vision, Values

IT Role Statement

Serve as a strategic partner to the University of Missouri enterprise by providing leadership to enable the university's missions through planning, implementation, operation and delivery of foundational and innovative information technology solutions

IT Strategic Objectives

Service Focus
- Develop, maintain and support university wide solutions to enhance the university's missions (teaching, research, outreach and economic development)
- Provide technology solutions to improve and streamline university processes

Optimized Process Management
- Provide high quality IT solutions to improve efficiency across the system
- Remove outdated applications and duplicated services that are no longer needed or providing significant benefits
- Practice good stewardship in the use of IT resources

IT Leadership
- Support the use and delivery of IT leading practices and technology throughout the university
- Sustain an infrastructure that fosters cooperation and collaboration across the system
- Sustain a professional well-trained organization able to design and deliver efficient IT solutions

IT Critical Behaviors

- **Accountable in all relationships** – develop, maintain strong and trusted relationships that demonstrate accountability from IT
- **Cost aware** – selection of IT solutions that meet the requirements via efficient use of resources and budget
- **Collaborative, courageous and innovative** – engage in 2-way dialogue, gain understanding and co-develop ideas and solutions with the business. Challenge the status quo and think outside the box to create better ways of working
- **Constituent-focused** – Put user experience first while building solutions or resolving issues

FY18 - 19 IT System Goals

1. Develop governance structures that enable system-wide integration
2. Collaborate to develop common future state IT financial models
3. Improve operating costs
4. Integrate common applications
5. Set goals to enable student success

Conceptual Model for Future IT

Strategic Campus Partners

IT Development
- Scientific Analysis Software Development

Academic IT Support
- Specialized IT Support to Aid Academic Goals and Objectives

IT Strategy & Architecture
- Business Relationship Management
- People Management & Resourcing

Management & Administration
- Project Management and Coordination
- Student and Intern Management

Centers of Expertise

Infrastructure Operations
- Cloud Infrastructure Management

IT Strategy & Architecture
- Organization Strategy
- Technology Innovation
- Enterprise Architecture
- Portfolio Management
- Disaster Recovery Strategy and Planning
- Business Continuity Strategy and Planning
- Demand & Capacity Management
- Cloud Vendor and Contract Management
- Data Warehousing

IT Development
- Application and Infrastructure (Design)
- Application Integrations
- Business Intelligence and Data Analytics
- Data Visualization

Quality Assurance
- Solution Testing

Policy & Procedures
- Policy Creation
- Policy Management
- Policy Enforcement

Enterprise Applications
- SaaS Application Management
- Other Speciality Applications

Management & Administrative
- Administrative Oversight
- IT Acquisition and Asset Management
- IT Contract Management
- IT Consulting Services
- IT Vendor Management
- Program Management and Coordination
- Retention
- SLA Management
- Talent Management
- Communications
- Data and Content Collection and Entry
- IT Cost Assessment

Research IT Support
- Specialized IT Support to Aid Research Goals and Objectives

Shared Services

End User Support
- Service Desk
- Endpoint Support
- Classroom and Computer Lab Support

Infrastructure Operations
- Data Center & IT Facility Management
- Network Support
- Server Support
- Technical Collaboration Infrastructure
- Storage Support
- Database Support

Management & Administrative
- Chargeback Metrics and Measures

IT Development
- Application and Infrastructure (Build)
- Release Management

Enterprise Applications
- E-mail & Authentication Administration
- HR
- Student
- Finance
- Advance
- Other Common Applications Across System

Security & Compliance
- Identity & Access Management
- Network Security Management
- Security Awareness and Accreditation
- Security Incident Management
- Security Threat and Vulnerability Testing
- Cloud Security and Provisioning
- IT Risk Mgmt & Mitigation Planning
- Regulation and Policy Compliance
- Investigations and Forensics

IT Service Delivery Model of the Future

Represents interaction (service delivery) between IT and its customers
*Does **not** represent location, geography, or placement of services*

Subject Matter Experts, and face to IT Leadership
- Drives execution of system-wide IT strategies and programs
- Provides information on policies and procedures
- Facilitates agility

Centers of Expertise

IT Strategic Campus Partners

IT Strategic business and campus Partners
- Trusted advisor and IT's representative to academic, department, administrative and campus leaders

Shared Services

Shared Services team skilled in multiple areas
- Creates incidents, service requests, change requests
- Facilitates escalation of complex issues to higher tiers and SMEs as needed

Self-Service Portal
- Supports self-service incidents, service requests and change requests

Self-service

School / Department Leadership, Campus Leadership, Research, Academic Leadership, Administrative Leadership

University-Wide IT Leadership

Students, Employees, Alumni, Community

Key Takeaways from the Collaborative Design Session

Information Technology

Understanding IT's Role

- Aim to be a partner with the University and faculty to drive innovation
- Focus on supporting students and provide them with with an engaging and enriching experience
- As the delivery of academic programs change, update the underlying infrastructure to provide seamless service

Opportunities for Adding Value

- Explore collaboration and innovation opportunities, while also being cost-effective
- Drive standardization through the governance models; encourage cross-campus partnerships
- Look at the processes to make smart investments
- Need for a standard underlying data architecture that provides data consistency