

Service Excellence Transformation Shared Services Briefing Note

March 2021

*Overview, current activity,
and proposed approach for the
shared services workstream*



**UNIVERSITY OF
ALBERTA**

**UofA for
TOMORROW**

The University of Alberta respectfully acknowledges that we are situated on Treaty 6 territory, traditional lands of First Nations and Métis people.

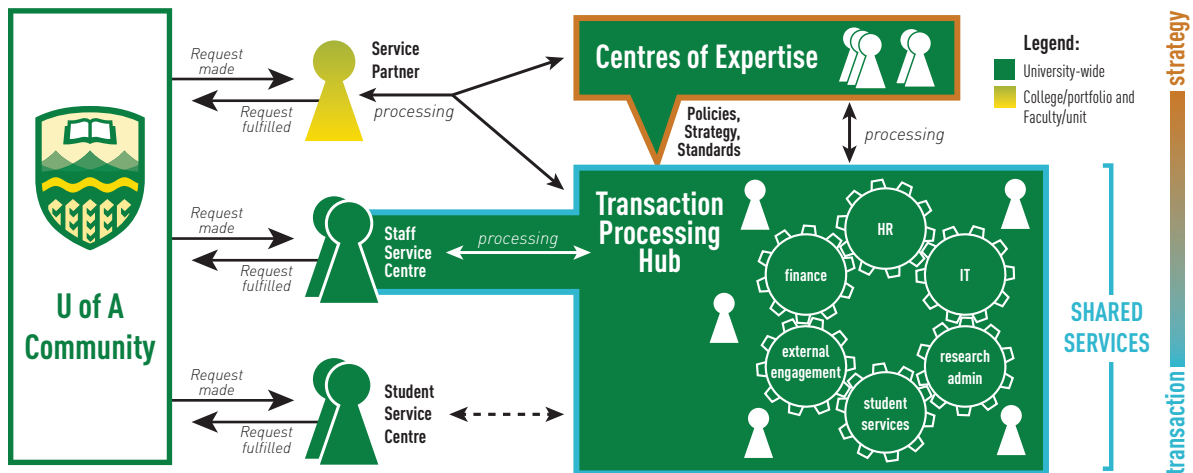
INTRODUCTION

Shared services provide efficient and effective service for faculty and staff, allowing them to focus time and attention on the university's core mission of teaching and research.

As a key component of the new operating model, shared services will consolidate transactional activities and processes from across the university into one common service organization. This allows for single points of accountability, minimizes duplication, maximizes service consistency, and generates the greatest opportunities for continuous improvement across the university. In doing so, shared services free up institutional time and resources to perform more strategic activities.

An effective shared service approach is not simply a cost-cutting exercise. In fact, a central promise of shared services is a greater focus on the needs of the university community. Once implemented, shared services will lead to an overall improvement in service quality.

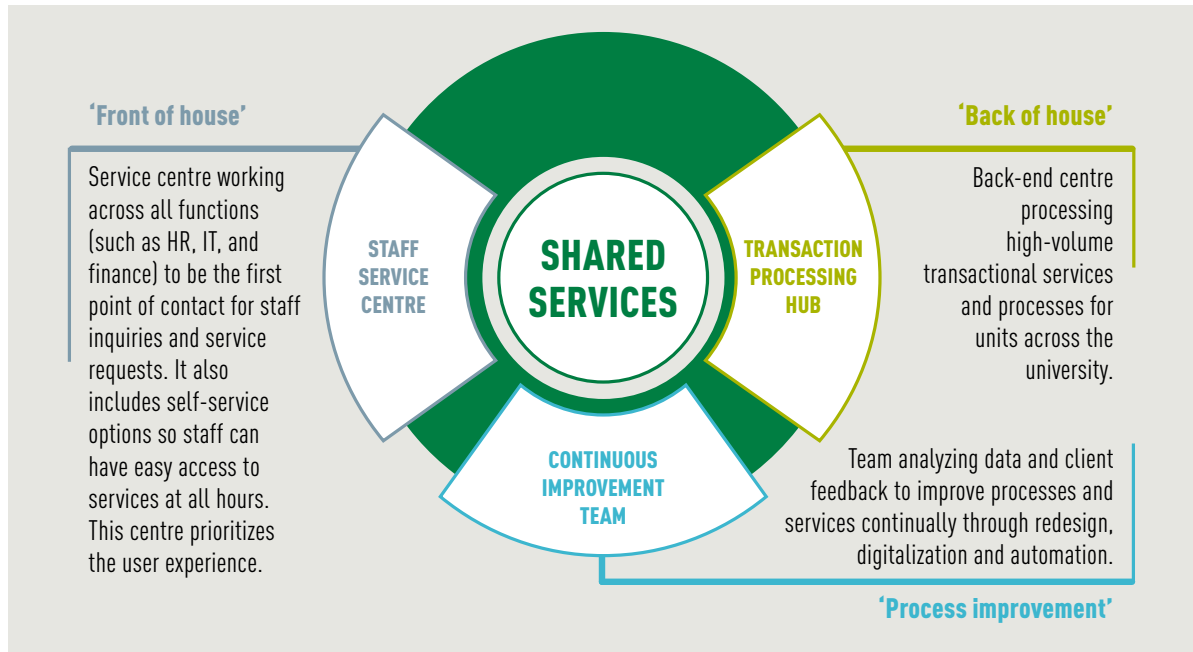
FIG 1. SHARED SERVICES WITHIN THE NEW ADMINISTRATIVE MODEL



SHARED SERVICES AT THE U OF A

A shared service function is commonplace for many universities and private companies across the world. The U of A has modelled its planned shared service unit on best-practice examples from academic institutions in Canada, the USA, UK and Australia. The U of A shared service function comprises three distinct elements that operate symbiotically to deliver efficient and effective services for users: the Staff Contact Centre, Transaction Processing Hub and Continuous Improvement Team.

FIG 2. THE THREE DISTINCT ELEMENTS THAT MAKE UP SHARED SERVICES



Shared services will evolve over time as more functions and services are transitioned. This minimizes risks and ensures continued service provision while services are redesign and transitioned. It also allows colleges and faculties to become accustomed to the new service structure.

Shared services will eventually be pan-university. Service catalogues are in development through consultation with leaders and subject matter experts from each administrative function. These identify services that will be migrated to shared services over the first 24 months of operation.

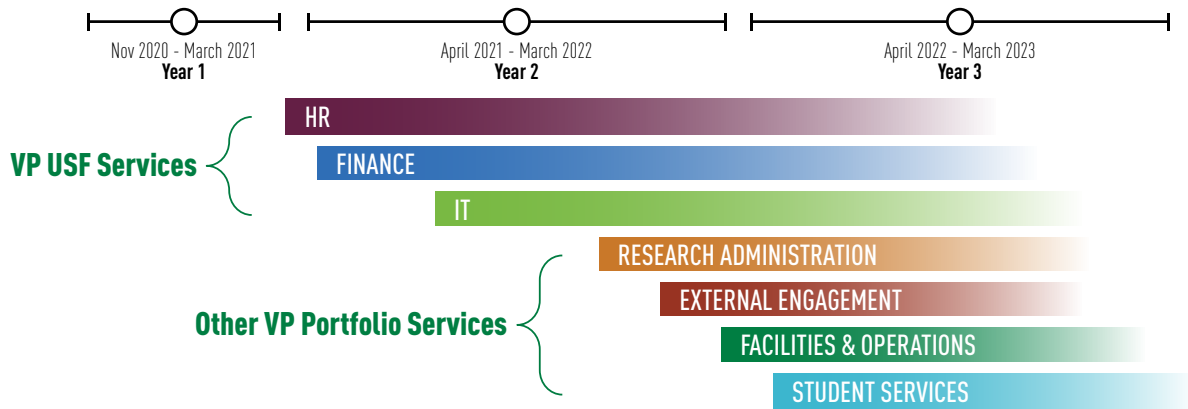
It is expected that shared services will be a contributor to service delivery across all key administrative portfolios, including:

- University Services and Finances (HR, Finance and IT)
- Research Administration
- External Engagement
- Facilities and Operations
- Student Services

These services are subject to change as the final delivery model is established across all six functional workstreams.

Below is a draft timeline for when various university administrative functions will be added to Shared Services. A service catalog will determine which services are delivered by Shared Services and what remains with the central unit.

FIG 3. INDICATIVE TIMELINE FOR THE ADOPTION OF SERVICES



PROCESS REDESIGN

To create value, a shared service model leverages technology, scale and specialization. It requires new ways of delivering services to the university community. Each process that is delivered by shared services must be redesigned to ensure it is optimized in the new operating model.

The key objective of the process redesign workshops is to develop a process that can be overlaid on the new operating model. Process redesign will ensure that administrative services are optimized for delivery, and that each completed process will be adopted into the standardized workflow.

Process redesign workgroups will define future-state processes, consult with colleagues for feedback, identify opportunities to leverage technology to streamline and automate processes, and provide support with implementation activities.

WHAT'S NEXT?

As development of shared services continues, our next steps include facilitating a series of structured workshops for each of the processes identified during the discovery phase of each functional stream.

To keep you informed about ongoing changes and updates within shared services, a [dedicated web page](#) has been created. Here you will learn more about how shared services will work, find information on consultation and engagement events, as well as prioritized activities, and much more. If you have feedback, comments, or suggestions, we encourage you to [share your thoughts here](#).