



# Shared Services Center (SSC) Update

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DFS Conversations

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# Agenda

- College/Unit Integration Status Update
- SSC Staffing
- Metrics – FY23
- Challenges
- Initiatives, Process Efficiencies, etc.

# College/Unit Integration Status

## Completed Integrations

- SC Johnson College of Business: **June 2021**
- Statler Hotel: **January 2022**
- College of Arts & Sciences: **June 2022**
- CALS-Agritech, Geneva: **February 2023**
- CALS/CHE/BSPP, reporting lines only: **February 2023**; full-service integration: **May 2, 2023**
- College of Veterinary Medicine: **March 2023**
- Research & Innovation (excluding CLASSE): **May 2023**
- Student & Campus Life: **August 2023**
- College of Engineering/Bowers CIS/CU Tech: **November 2023**
- CLASSE: **December 2023**

## Future Integration

- Lab of Ornithology: **FY 2024**

# SSC Staffing as of 2/14/2023

SSC	# of Full-time staff	# of Temps/Gigs	
Procure-to-Pay	56	8	Includes 1 full-time vacant Acct. Rep. position.
Travel & Training	18	5	Includes 1 full-time vacant Acct. Rep. position.
Financial Management & Reporting	8	2	
Payment Services (P2P)	6	2	
Receptionist	1		Serves the entire Division of Financial Services.
SSC Leadership	7		Includes 1 full-time and 2 half-time SSC liaisons. SSC liaisons support CAS, SC Johnson, Research, CVM, SCL, and CoE/CIS/CU Tech.
<b>Total # of FTE's</b>	<b>90</b>	<b>17</b>	

# FY23 Metrics

<b>Functional Area</b>	<b>Created</b>	<b>Approved</b>	<b>Grand Total</b>
Financial Management	23,824	54,706	78,530
Procure-to-Pay	78,019	641,711	719,730
Travel	13,819	46,783	60,602
<b>GRAND TOTAL</b>	<b>115,662</b>	<b>743,200</b>	<b>858,862</b>

## *Exclusions:*

- *Concur expense reports created on behalf of faculty and staff.*
- *E-docs initiated/approved by Payment Services.*

# Challenges

- **To successfully perform existing and future services and meet turnaround standards and customer needs, we face some challenges:**
  - Transaction volume has increased and is higher than expected.
  - A gap in staffing numbers does not allow time to assess potential process improvements and efficiencies as quickly as expected.
  - Funding for positions is needed before implementing the costing allocation model.
- **Ways we are addressing the staffing gap:**
  - Actively searching to fill 2 Account Rep IV, band D positions on the P2P and Travel teams.
  - Continuing to offer overtime to interested staff.
  - Extending part-time temps through June 2024.
  - Offering part-time gig opportunities to campus.

# Initiatives Completed

- ✓ Transitioned college BSC staff to the SSC.
- ✓ Virtual Office Hours offered 5 days a week, via Zoom.
- ✓ Created 9 Team Dynamix forms to request services and 9 templated responses for consistent messaging to the requestor.
- ✓ Implemented a new PCard \$2,500 limit, in addition to the \$500 and \$1,500 limits.
- ✓ Added a Workday supervisor to the 20-day PCard warning notification and the suspension notification.
- ✓ Made several I Want Doc changes and improvements for the user's experience.
- ✓ Streamlined access request process.
- ✓ Made Concur system changes to reduce the need to return expense reports.

# In-Progress and Future Initiatives

- ❑ Identifying additional staffing needs to support the volume of transactions.
- ❑ Issuing Service Level Agreements (SLA) to colleges/units.
- ❑ Creating standardization and efficiency projects within all functional areas.
- ❑ Creating standard SLA metric reports for colleges/units in comparison to SSC turnaround standards.
- ❑ Building out website content and making revisions.
- ❑ Reviving Travel 107, Travel Policy training in conjunction with updating the Travel policy to new template.
- ❑ Collaborating with Global Operations to ensure compliance with Travel Registration requirements for international travel.
- ❑ Working with Ivy League travel leaders to identify challenges and potential solutions in the travel space.
- ❑ Identifying changes to OAS dashboard to provide better travel data to customers.
- ❑ Working with Procurement to increase the number of travel-related contracts to reduce spend.
- ❑ Building a consistent process for outstanding travel advances and prepaid travel.
- ❑ Provide cardholders a secure access to information needed to validate identity with credit card issuer.
- ❑ Automate cardholder (PCard and T&M card) certification process.
- ❑ Automate cardholder reporting for administrative managers to easily access cardholder lists for their units, when needed.
- ❑ Modify pcard documentation form to ensure needed information is captured to reduce the requests received by cardholders for additional information.
- ❑ Evaluate vendor registration tools to improve vendor/payee experience and improve automated registration and updates.



# Ongoing Effort

- Commitment to customer service.
- Various training available in CU Learn and ad-hoc training provided, as requested.
  - For example, I Want Doc, Procurement Gateway, Concur Travel, Group Travel.
- Provide professional development growth and opportunities for SSC staff.
- Provide gig opportunities for Cornell employees who are interested in learning more about the SSC.

Thank you!

