INFORMATION SESSION
What is Shared Services?

• Consolidation and re-engineering of administrative functions to improve services
• Allows units to focus on core mission and strategic initiatives
• Substantial increases in efficiency in business processes
• Standardization
• Improved internal controls
• Leveraged technology
Vision OHIO Linkage

- Accountability that is essential to effective management and good customer service
- Commitment to assessment, planning, decision making, and continual improvement
- Operational efficiencies and revenue enhancement
- Resource savings for reallocation to Vision OHIO initiatives
## Governance

### Steering Committee
- Bill Decatur, Finance & Administration
- Ben Ogles, Arts & Sciences
- Hugh Sherman, Business
- Kent Smith, Student Affairs
- Brice Bible, Information Technology

### Project Team
- Beth Lydic, Education
- Anita Mondo, Psychology
- Gwen Brooks, Human Resources
- Dawn Weiser, Finance & Administration
- Brian Bowe, Enterprise Applications
- Julie Allison, Facilities Management
- Gina Fetty, Controller
- Mark Hopton, Shared Services

### Travel and Expense Project Team
- Linda Morrison, Procurement
- Joe Shields, Physics & Astronomy
- Tressa Ries, Accounts Payable
- Sue Shaw, Procurement
- Cindy Meyer, Procurement
- Tina Canter, Southern Campus
- Tanya Hire, Accounting
- Mark Hopton, Shared Services
- Linda Shapiro, Assoc. Controller
- Brian Bowe, Enterprise Applications
- Evelyn Blake, College of Business
- Frank Corris, Procurement
- Shannon Bruce, Purchasing Card
Need

- Reduced processing costs
- Eliminated redundancies
- Leveraged technology
- Reduced administrative effort for faculty
Advantages

• Improved cycle times
• Fewer steps in a process
• Visibility to transactions
• Transparent processes
• Greater than 80% standardization
• Reduced processing costs and a reduction in backlogged documents
Examples

- Employee self-service
- Management reporting
- Automated travel booking and expense reimbursement
- Standard processes in all steps from hire to retire
Impact

- Financial
- Service
- Value-Added
Hurdles

• Cultural change
• Move to consolidation from decentralization
• Staff retraining and redeployment
<table>
<thead>
<tr>
<th>Date</th>
<th>Function</th>
<th>Status</th>
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<tbody>
<tr>
<td>July-08</td>
<td>Absorb AP &amp; Payroll</td>
<td></td>
</tr>
<tr>
<td>August-08</td>
<td>Begin Workforce implementation</td>
<td></td>
</tr>
<tr>
<td>September-08</td>
<td>Hackett Benchmark Results</td>
<td></td>
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<tr>
<td>October-08</td>
<td>Finalize VPFA administrative functions</td>
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<tr>
<td>October-08</td>
<td>Complete management reporting for VPFA</td>
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<tr>
<td>October-08</td>
<td>Re-engineer AP processes</td>
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<tr>
<td>November-08</td>
<td>Finalize Organizational Design And Staffing Model</td>
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<tr>
<td>December-08</td>
<td>Develop Service Level Agreement Template</td>
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</tr>
<tr>
<td>January-09</td>
<td>Expand Services To Other Planning Units</td>
<td>Not started</td>
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<tr>
<td>January-09</td>
<td>Implement Employee Self Service</td>
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</tr>
<tr>
<td>March-09</td>
<td>T&amp;E Implementation</td>
<td></td>
</tr>
</tbody>
</table>
Contact Information

- [http://www.facilities.ohiou.edu/sharedservices/](http://www.facilities.ohiou.edu/sharedservices/)
- [sharedservices@ohio.edu](mailto:sharedservices@ohio.edu)
- [hopton@ohio.edu](mailto:hopton@ohio.edu)
- Mark Hopton – 597-3269
Procurement Transformation

• Long journey involving people making significant changes affecting process and culture

• Enabling internal customers to conduct business in a more efficient way – by finding the best products and services they need, at the most competitive prices, and delivering on time

• Series of ongoing collaborative initiatives influenced by Ohio Department of Administrative Services, Chancellor Fingerhut and Gov. Strickland
Vision OHIO Linkage

- Accountability that is essential to effective management and good customer service
- Operational efficiencies and revenue enhancement
- Resource savings for reallocation to Vision OHIO initiatives
Goals

- Increased flexibility
- Increased accountability
- Increased transparency
- Increased efficiency
Initiatives

• Paperless purchasing solution with electronic workflow and approval processes
• Maximized purchasing power and reduced costs through consolidating procurements with key suppliers
• Eliminated off-contract purchasing
• Standardized products
• Improved and consistent reporting of indirect goods purchasing
• Reintroduced supplier diversity and expanded program and supplier base
**Product: Oracle Advanced Procurement**

*Modular Product Suite*

<table>
<thead>
<tr>
<th>Spend Analysis</th>
<th>Strategic Sourcing</th>
<th>Contract Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Purchasing Intelligence</td>
<td>• Sourcing</td>
<td>• Procurement Contracts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Self Service</th>
<th>Procure-to-Pay</th>
<th>Supplier Enablement</th>
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</thead>
<tbody>
<tr>
<td>• iProcurement</td>
<td>• Purchasing</td>
<td>• iSupplier Portal</td>
</tr>
<tr>
<td>• Services Procurement</td>
<td>• Accounts Payable</td>
<td>• Supplier Network*</td>
</tr>
</tbody>
</table>

*Complimentary service component of Advanced Procurement Suite*
Policy-Driven Self-Service Requisitioning
Automate and Control Employee Buying

- Self-service ordering in familiar web shopping interface
- Smart Forms to structure non-catalog orders
- Purchasing-controlled and directed to preferred suppliers
- Configurable approval flows with accounting enforcement
- Self-service order tracking and order changes
- Complete process automation
What Should You Expect

- Ease of Use...build a shopping cart...click, don’t type!
- Deep selection of products and suppliers
- Confidence...always purchasing from contracted suppliers within solid internal controls
- Increases visibility of diverse suppliers
- Seamless integration with current Oracle Financial applications and Purchasing Card
- Will become preferred method of purchasing
Suppliers Within eProcurement MarketPlace

- Grainger
- Fisher Scientific
- OfficeMax
- Lenovo
- Apple
- HP
- Dell
- CDW-G
- Cibi
- King
- Continental
Sustainability

• Green purchasing policy

• Environmentally responsible purchasing

• Green Alternatives Program
  • Recycled copy paper
  • Safe chemicals
  • Janitorial supplies
Hurdles

- Decentralized purchasing throughout the campus
- Users have little formal training in Advanced Procurement techniques and methodologies
- Paper-based systems with minimal technology integration
- The Purchasing group appears to be valued only by unit cost reduction; thus, their focus has not been on business process improvements or data-lead decision making
IUC Marquee Sourcing Projects

• **Purchasing Card Services**
  - Inter University Council (IUC-PG) cooperative bid is lead by Ohio University
  - Over $225M in collective annual spend
  - $34M/year is Ohio University spend
  - Rebates could increase by $100,000 per year

• **Furniture**
  - IUC-PG cooperative bid lead by Ohio State University
  - $25M in collective annual spend
  - $2M/year is Ohio University spend
  - Discount expected to increase by 5%

• **Pharmacy Benefits with RxOC**
  - Joint a collaborative with OPERS, STRS, SERS, and OSU
  - Over $1B in collective annual spend
  - Saving of 8% or $600,000/year for Ohio University
OU Marquee Sourcing Projects

• Travel and Expense Project
  • Cost saving of $140,000/year
  • Income generated another $300,000/year

• Coal
  • Purchase coal futures at 25% under market price
  • Cost avoidance of $1.5M over two years
  • A $5M Minority Business Enterprise (MBE) set-aside

• Computer Network Gear and Cabling
  • Conducted Ohio’s Higher-Ed’s first Reverse Auction
  • Saving of 12% to 16% for a combined savings of $165,000
Financial Impact

Source: SciQuest ROI analysis for OU
Timeline

Pre-work has begun in the following areas:

- Preferred Suppliers are listed on Purchasing web site
- Travel web site has been updated and link to Travel World and other preferred travel service providers
- Contract negotiation underway with Oracle at present
- Implementation Work to begin in Spring 2009
- Full implementation and roll out in Fall 2010
For More Information

• Contacts
  • Frank Corris, Chief Procurement Officer
    • Email: corris@ohio.edu
    • Phone: 740.597.3261
  • Ralph Six, Director of Purchasing
    • Email: six@ohio.edu
    • Phone: 740.593.1969
COMPENSATION PLAN

Steve Brooks
What is a Pay and Classification Plan study?

- Deliverables include:
  - Pay/classification plan analysis and recommendations
  - Fair Labor Standards Act (FLSA) compliance
  - Broad banding options
  - Current market surveys
  - Update and/or revision of job classifications
  - Wage compression analysis
  - Interface with University performance management system career path recommendations, employment/records system
What is a Pay and Classification Plan study?

• Deliverables (continued):
  • Competency driven ranges, training and implementation for University staff
  • New pay and classification plan for unclassified, administrative staff for alignment of classifications and salaries with the market
  • Review of current classified pay plan for non-represented staff
  • Recommendations to the Assistant Vice President for Human Resources
Vision Ohio Linkage

• Goal - Recruit and retain talented and diverse, students, staff and faculty

• Objective – Create and implement a strategic and comprehensive Human Resources plan
  • Year One
  • Establish Compensation Office
  • Engage consultant to design new administrative and classified pay plan
  • Evaluate purchase of compensation analysis software
Governance

Oversight
• Bill Decatur, Finance & Administration
• Linda Lonsinger, Human Resources

Project Team
• Steve Brooks, Compensation
• Steve Madden, Compensation
• Chy Wooten, Compensation
Steering Committee

- Beth Maxon, Communications/Marketing
- Eileen Theodore Shusta, Library
- April Henderson, Arts and Sciences
- Judy Piercy, Residence Life
- Tressa Ries, Finance
- Margaret Shesky, Advancement
- Sari Bailey, Payroll
- Wendy Merb-Brown, Administrative Senate
- Debbie Evans, Information Technology
Steering Committee (continued)

- Shane Gilkey, Research
- Stephanie Howe, Voinovich School
- Becky Bushey-Miller, Human Resources
- Amy Dean, Athletics
- Laura Myers, Institutional Equity
- Ed Yost, College of Business
Need

- Update 30+ year old administrative and professional pay plan
- Proactively address matters of compensation related to recruitment, retention, equity and variable pay
- Generate seamless interface between new classification plan and performance management initiative
Pay Plan Advantages

• Increased flexibility to colleges and departments in compensation related matters
• Improved retention of qualified staff
• Streamlined process and reduced paperwork
• Place Ohio University in competitive mode to compete for critical staff talent
<table>
<thead>
<tr>
<th>Date</th>
<th>Milestone</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2008</td>
<td>Complete work structure session – CODE facilitates</td>
</tr>
<tr>
<td></td>
<td>Complete Project Charter</td>
</tr>
<tr>
<td>August 2008</td>
<td>Publish RFP</td>
</tr>
<tr>
<td>September 2008</td>
<td>Receive bids, make recommendations</td>
</tr>
<tr>
<td></td>
<td>Initiate contract negotiations, communication plan</td>
</tr>
<tr>
<td>October 2008</td>
<td>Communicate to campus community re: RFP</td>
</tr>
<tr>
<td>October 2008 - November 2009</td>
<td>Staff work on new administrative pay plan, preliminary review of classified pay plan. First Steering Committee meeting</td>
</tr>
<tr>
<td>December 2008</td>
<td>Recommendation to purchase new compensation software</td>
</tr>
<tr>
<td>February 2009</td>
<td>Decision to purchase new software or stay with Oracle based solution.</td>
</tr>
<tr>
<td>November 2009</td>
<td>Completion of Administrative Compensation Plan</td>
</tr>
<tr>
<td></td>
<td>Revise Administrative Compensation policies, congruency with Administrative Pay Plan</td>
</tr>
<tr>
<td>December 2009</td>
<td>Begin targeted training regarding new system</td>
</tr>
<tr>
<td>February 2010</td>
<td>Go live with new administrative pay plan</td>
</tr>
</tbody>
</table>
Communication

- HR Manager Group
- Administrative Senate
- Classified Senate
- Deans, Directors and Department Heads
- Vice-Presidents
- Executive Vice President & Provost
- Board of Trustees
- President of Ohio University
- Business Unit Managers
- Planning Unit Heads
- HR Website modification to include link and FAQs
Contact Information

• Stephen Brooks – 597-2153
• HR website link – when activated
Academic Support Unit Program Review

Gary Neiman
What is Academic Support Unit Program Review?

• Purpose: to provide a consistent, robust and transparent way to continually improve the effectiveness and efficiency of all services within the University community
Guiding Principles

• Process will lead to continuous improvement
  • based on EHE methodology (Brent Ruben)
• Self-studies will be evidence-based
• Self-studies will address unit goals and objectives and ensure linkage to Vision OHIO
• Process will be parsimonious and sensitive to time and effort required of all participants
• Where possible, external benchmarks will be used
“Ohio University holds as its central purpose the intellectual and personal development of its students … Our academic support services exist to serve the academic mission: they should be effective, efficient and continually improving.”
Governance

• Executive Vice President & Provost’s Office
• Academic Support Unit Committee (represent the more than 50 academic support units and the faculty)
• Institutional Research
• Center for Organizational Development and Effectiveness (CODE)
• Unit Completing Review
Components

1. Formative
2. Summative
3. Action
4. Accountability
Methodology

- Formative
- Summative
- Accountability
- Action
The four phase process timeline is designed to provide maximum flexibility for departments in each cohort. A cohort department may begin at any point during the designated cohort year. Every unit should be able to complete a cycle of the four phases within 18 and 24 months.

Although the time spent in each phase may vary by unit, the idealized timeline is as follows:

- Formative (months 1-3)
- Summative (months 4)
- Action (months 5-16)
- Accountability (months 17-18)
EHE Organizational Review

Categories

• Organizational Profile
• Leadership
• Purpose and Plans
• Beneficiaries and Stakeholders
• Programs and Services
• Staff and Workplace
• Knowledge, Assessment and Info Use
• Outcomes and Achievements
Advantages

• Goal is continuous improvement
• Evidence-based
• Unit and institutional “buy-in” on goals and objectives
• Directly link to the implementation plans for Vision Ohio ongoing success
• Activities will be sensitive to time and effort required
• Where possible, external benchmarks will be used to assess effectiveness and efficiency.
• Improvement efforts will add-value for unit stakeholders/customers.
Examples

- Similar external review and stakeholder assessment process has been successfully used at: Northwestern, Ohio State, Bowling Green and Georgia State universities.

- This process will enable the University Community to become more aware and “buy-in” to the unit’s mission and goals.
Financial Impact

- Funds will be necessary to support approximately 7-10 external review teams per year.
- These funds will be supported by CODE via a central allocation.
- In addition, the unit’s time in preparing self-studies, mission review, etc., is acknowledged as necessary time investment to engage in the continuous improvement process.
- The return on this investment is improved quality and greater efficiency.
Hurdles

• Some units prefer not engage in the review and continuous improvement process

• It is expected that our practice of posting best practices on the ASUPR website will mitigate this aversion and add to a campus climate of continuous improvement and concomitant resource efficiencies.
Two-Way Information

- [www.ohio.edu/asupr/index.htm](http://www.ohio.edu/asupr/index.htm) contains an expansion of the information provided in the PowerPoint Presentation and in the handout and will be posting self-studies and, ultimately, best practices.

- The ASUPR leadership team of Gary Neiman (neiman@ohio.edu), Michael Williford (willifor@ohio.edu) and Terry Conry (conry@ohio.edu) are happy to respond to email inquiries.

- Follow-up stories on the ASUPR process will appear in OUTLOOK.
Strategic Enrollment Management Plan

Sustainability Planning

Kathy Krendl, Executive Vice President and Provost
Strategic Enrollment Management

Craig Cornell
What is Strategic Enrollment Management?

• A process and plan which aligns with internal strategies (Vision Ohio) and external constituencies (USO) to reach our enrollment and retention goals, involving:
  • Collaboration
  • Planning
  • Assessment
  • Team Work
Vision OHIO Linkages

• Objective 10
  • Create and implement a strategic enrollment plan that promotes fiscal stability and improvements in quality, access, and affordability/efficiency

• Goal: Create and implement a strategic enrollment plan that promotes fiscal stability and improvements in quality, access, and affordability/efficiency
• Create and implement a strategic enrollment plan that promotes fiscal stability and improvements in quality, access, and affordability/efficiency
  • Strategy 1: Establish Vice Provost for Enrollment Management Positions --- Done!
  • Strategy 2: Improve the quality of first-time enrollees
  • Strategy 3: Improve access, affordability and efficiency
  • Strategy 4: Create and implement a student recruitment marketing campaign
  • Strategy 5: Expand marketing and advertising
Governance

Strategic Enrollment Management Committee Structure 2008

- Strategic Enrollment Management Steering Committee (SEMSC) – Oversight
  Executive Staff

- Enrollment Management Advisory Committee (EMAC) – Advisory
  Standing Presidential Committee

- Enrollment & Retention Monitoring Committee (ERMC) - Implementation
  Hands-On; Director’s

Vice Provost, Enrollment Management Strategy
Need

- 10% decline in number of high school graduating seniors in the state of Ohio in the next six years
- Region will experience strong decline in same period
- Growth potential in select areas which we will target
- Have had 5% increase in Pell eligible students and a 3% growth in Ohio Grant eligible students in the past two years.
- Although have done well with scholarship programs, need to strategically align scholarship programs to best meet affordability challenges facing families and students.
Advantages

• Formal enrollment management plan developed with USO guidelines in mind will allow us to become the Ohio University we want within the constraints of the current economy, student demographics and political landscape we are in by:
  • Shaping class to meet Vision OHIO goals by increasing quality, access and growth in enrollment-targeted areas (e.g. diversity, out-of-state, academic indicators, international, transfer)
Advantages (continued)

- Developing comprehensive recruitment and retention initiatives based on data-driven analysis that will then inform the creation of an environment where our students will be successful.

- Tackling the “affordability” question and concerns in a systematic and strategized approach given the limited resources now and in the future.
Advantages (continued)

• Building a collaborative approach where all feel part of the enrollment and retention successes of Ohio University.

• Success will be measured by:
  • How well we recruit, retain and graduate our students as outlined in our Vision Ohio goals
What is Sustainability Planning?

Considering environmental impacts as we strive to meet Ohio University’s needs, now and into the future
Initiatives

• President’s Climate Commitment
• House Bill 251 implementation plan
• Campus sustainability planning process
• Construction and maintenance standards
• Reducing energy consumption
Vision Ohio Linkage

- **Goal:** Enrich the environment for students, faculty, staff and the region
- **Objective:** Improve campus facilities and strengthen commitment to sustainability
• Transformational goal for Facilities
• Campus sustainability planning process will be participatory and draw on stakeholder input across campus.
• Infrastructure initiatives will continue to be developed and implemented by Facilities Management, UPI, and affected departments and programs.
Why sustainability planning is needed and timely
Advantages

- Reduced GHG footprint
- Avoided utility and waste disposal costs
- Healthier, richer campus environment
- National prominence
- Compliance with legislation
Thank you for attending.

Please complete the evaluation form to help us find the best ways to provide you with timely and useful information.