The UC Davis Shared Services Center has made great strides to improve relationships, enhance services and increase visibility – earning an 80% favorable rating from customers in the most recent satisfaction survey.
Outline

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Executive Summary

The UC Davis Shared Services Center (SSC), a unit of the Office of the Vice Chancellor & Chief Financial Officer, is an important effort directly supporting the Chancellor’s Vision to “Cultivate a Culture of Organizational Excellence, Effectiveness and Stewardship.” The SSC team made great strides during the 2014–15 fiscal year. An almost entirely new management team was hired and a number of initiatives were executed to improve relationships, services and visibility.

The SSC was established in early 2012 to provide more efficient, cost-effective central services to the university. During the 2014–15 fiscal year, the SSC underwent a number of significant changes to improve processes, cultivate customer satisfaction and increase campus engagement.

2014–15 Accomplishments

- Completed 11% increase in overall requests, from 63,458 in 2013–2014 to 70,365
  - more than 90,000 including Service Desk requests
- Completed collaborative process to build a shared mission and vision
- Launched a new website to enhance communication and brand SSC
- Opened a satellite space on core campus to serve new student employees
- Executed a Finance Team redesign to better support clients and build relationships
- Hosted a first-ever campus-wide Open House event
- Shared best practices with other UC campuses – including Berkeley, San Francisco, Merced and Riverside
- Conducted extensive outreach and client engagement
- Engaged in community and campus service through leadership in campus committees, participation in campus events and service-oriented activities, including adopting a Short Term Emergency Aid Committee (STEAC) family and collecting food for the UC Davis Food Pantry
- Completed first-ever upgrade to case management with minimal disruption to clients and staff
- Achieved overall increase in client satisfaction – with more than 80% of respondents considering service “Good” or better

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1 Additional details are available in Appendix A, FY 15 dashboard
2 Details available in Customer Service Analysis Summary document; please contact SSC Leadership for a copy.
Future Efforts

The UC Davis SSC strives for continuous improvement and continues to grow and develop its offering to meet its mission of enabling the One UC Davis mission through partnership. Future plans include the following:

- Execute technology upgrade
- Revamp and update Service Partnership Agreements
- Support, as requested, new units at UC Davis
- Explore additional service offerings
- Continue to improve processes
- Maintain a partner-focused, continuous improvement culture
- Conduct enhanced communication efforts
- Continue to develop and grow a service culture
- Execute pilot of campus-wide service to enhance operational efficiency of accounts payable invoice payments

Metrics & Workload Statistics

Shared Service Center teams – including Finance, Human Resources and Payroll – supported 70,365 requests\(^3\), an overall increase of almost 10% from 2013–14. When the Operations Team activity is added to the volume, more than 90,000 requests were supported in 2014–15.

\(^3\) Counts are based on requests made in case management. For convenience of the client base, many requests may be in the same request. For example, the Payroll Team may process multiple funding changes on a single request or the HR Coordinators may process multiple student hires in a single request.
FY 15 Total Volume of Requests

Volume of Requests by Category

SSC Overall Performance Change
FY 14 to FY 15 Client Satisfaction Comparison

Overall Shared Services Center Accomplishments

The UC Davis Shared Services Center (SSC) accomplished a number of initiatives during 2014–15. Aside from the increase in overall work completed, a number of additional projects were accomplished during the year.

Mission & Vision

During Fall 2014, surveys and listening sessions were conducted with SSC staff, central unit business partners, and clients to create a shared mission and vision for the SSC.

**Vision Statement:**
The UC Davis Shared Services Center is a trusted partner in providing administrative support functions that allow our campus community to focus on their core functions to accomplish the One UC Davis mission of teaching, research and public service.

**Mission Statement:**
The mission of the UC Davis Shared Services Center is to be a partner–focused organization that delivers quality finance, human resources and payroll services in support of One UC Davis’s mission of teaching, research and public service.
Website

The SSC website was completely redesigned to better serve clients. The new website was built based on feedback from clients, central business partners and SSC staff. It now provides a variety of information on the services provided by the SSC to the campus community, and receives regular updates to keep valuable information fresh.

Open House

In March 2015, the SSC hosted its first campus-wide Open House, attended by more than 300 campus community members, including the Chancellor, Provost, Chief Financial Officer, and several other campus leaders. The Open House showcased the overall SSC, as well as the individual team services and efforts. The event provided the campus community an opportunity to learn more about its shared service center. The event also raised awareness across the campus of the services offered.

Improved Client Service

The SSC and other parties have surveyed the client groups on a regular basis since its inception in 2012. During the 2014–15 fiscal year, client service satisfaction improved significantly. In the most recent survey, more than 80% of respondents considered the service by the SSC staff to be “good” or better. This percentage is much higher than in previous years, indicating an increase in client satisfaction and improved relationships.

Staff Connection to Campus Community

Throughout the 2014–15 year, SSC staff engaged with the campus community in a variety of ways. From a Fall 2014 visit to learn more about the campus to active involvement in initiatives, the SSC staff is showing its commitment to the campus community through action. Campus community volunteerism and involvement include supporting Soaring to New Heights, hosting a booth at Thank Goodness For Staff, and volunteering at a commencement ceremony.

Governance & Continuous Improvement Efforts

During the 2014–15 fiscal year, the SSC Governance structure was formalized, including the revamp of the Client Advisory Committee to be the Client Partnership Committee and the addition of Functional Workgroups. From the strategic lens of campus (Governance) to the Operational link (Chief Operating Officers) to the Functional level (CPC/Functional groups), the SSC strives to have a forum for
discussing current and future operations in a manner that will continue productive dialogue between the groups.

Budget Model

During the 2014–15 fiscal year, the SSC maintained a flat budget for the third year in a row. Additionally, the SSC utilized a data analyst to conduct extensive analysis in partnership with Budget & Institutional Analysis to continue to evolve the budget model, seeking a transparent and predictable model for clients and those interested in joining the client base. The budget model work will continue in 2015–16 to ensure it aligns with the campus budget model efforts and can maintain transparency in the process.

Training & Development

In an effort to continue to develop and inspire our team, a number of initiatives were launched. Each employee had an opportunity to create an individual development plan and identify professional training interests. Additionally, in partnership with Administrative Officers for the Future (AOFTF), an assessment was conducted to determine training needs of SSC clients and staff, with recommendations for 2015–16.

Team Accomplishments

The UC Davis Shared Services Center consists of four main teams: Finance, Human Resources, Operations and Payroll — with strong support from Organizational Excellence. An organization chart and specific details about the team efforts are included below.
Finance Team

The SSC Finance Team underwent a number of changes during 2014–15. They welcomed a new manager, new supervisor and new accounts payable coordinator. Additionally, the Finance Team underwent an entire redesign to better support clients and to better build sustainable relationships with clients.

Metrics / Summary of Activity

During the 2014–15 fiscal year, the Finance Team increased its total transactions completed by almost 15%, while maintaining the same staffing level.

<table>
<thead>
<tr>
<th>Finance Request Types</th>
<th>7/1/13-6/30/14</th>
<th>7/1/14-6/30/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing Documents</td>
<td>18257</td>
<td>23202</td>
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<td>Pcard transactions</td>
<td>2431</td>
<td>2471</td>
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<tr>
<td>A/P documents</td>
<td>25897</td>
<td>27953</td>
</tr>
<tr>
<td>T&amp;E</td>
<td>499</td>
<td>40</td>
</tr>
<tr>
<td>TOTAL</td>
<td>47084</td>
<td>53666</td>
</tr>
</tbody>
</table>

Summary of Accomplishments

- Procure to Pay Finance Team Redesign: In response to client feedback and in coordination with Organizational Excellence, the SSC Finance Team was redesigned to allow teams to support a specific set of clients, facilitating SSC staff knowledge of business needs and growth in relationships.
  - Initiated pilot team in place and successfully completed pilot
  - Transitioned the staff to teams and moved them into close proximity
  - Transitioned departments to teams and notified clients
- Transitioned 25 departments to the On-Line Pre-Purchasing System (OPP)
  - Conducted outreach to bring new clients over to OPP
  - Developed PowerPoint training for staff to ensure all have the same information on processing with OPP
  - Worked one on one with departments to assist them in OPP set up
  - Developing clear directions for departments to use for transition
  - Developing presentation for new clients to use for on-site training
  - In partnership with College of Agricultural & Environmental Sciences programmers, coordinated OPP enhancement to improve reporting and to increase functionality
Payroll Team

The SSC Payroll Team continues to hone and refine its support to clients. The team welcomed new payroll coordinators, conducted its first-ever boot camp, and began a pilot of transitional support to an academic cluster in support of four academic departments.

Metrics / Summary of Activity

The Payroll team supported close to 7,000 employees during 2014-15 and processed almost 28,000 payroll and personnel transactions for the eight divisions currently supported.

<table>
<thead>
<tr>
<th>Client Employee Headcount</th>
<th>7/1/14-6/30/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biweekly (Non-exempt)</td>
<td>4968</td>
</tr>
<tr>
<td>Monthly (Exempt)</td>
<td>1722</td>
</tr>
<tr>
<td>Without Salary</td>
<td>92</td>
</tr>
<tr>
<td>TOTAL</td>
<td>6782</td>
</tr>
<tr>
<td>Payroll Transactions (PAN) and Personnel Transactions (OPTRS)</td>
<td>27997</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payroll</th>
<th>7/1/13-6/30/14</th>
<th>7/1/14-6/30/15</th>
<th>Net +/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hires</td>
<td>2596</td>
<td>2717</td>
<td>121</td>
</tr>
<tr>
<td>Separations</td>
<td>2629</td>
<td>2399</td>
<td>-230</td>
</tr>
</tbody>
</table>

Summary of Accomplishments

- Partner Team Creation: In an effort to have payroll coordinators provide better support to one other and ensure a client-focused method, the payroll teams were reshaped to provide better coverage, build team cohesiveness and improve communication.

- Payroll Ambassador Program: The SSC Payroll Team led client engagement efforts, seeking to better understand client business needs. These meetings provided and will continue to provide an opportunity to connect the payroll coordinators with the UC Davis mission – building stronger relationships between the team and clients.

- Team Development: During 2014-15, the SSC Payroll Team conducted a number of activities to develop the team, both as individuals and as a team. The year started with a “Payroll Bootcamp” to expedite the training of new coordinators. Additionally, a structured training plan was developed to support new coordinators in their journey to being an SSC payroll coordinator. Finally, the Payroll Team attended the career management academy, supporting the individual development of the team.
Human Resources Team

The SSC Human Resources Team underwent a number of changes during 2014-15, including the hiring of a new HR Operations Manager. Additionally, the team supported a strategic effort of the One HR Transformation in End-to-End Recruitment support. Lastly, in response to client feedback and in partnership with Student Affairs, a satellite office was opened on campus to better support student employee hiring and onboarding.

Metrics / Summary of Activity

<table>
<thead>
<tr>
<th>HR Request Types</th>
<th>7/1/13-6/30/14</th>
<th>7/1/14-6/30/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position maintenance</td>
<td>476</td>
<td>418</td>
</tr>
<tr>
<td>Recruitment</td>
<td>1655</td>
<td>1700</td>
</tr>
<tr>
<td>Salary actions</td>
<td>568</td>
<td>435</td>
</tr>
<tr>
<td>TOTAL</td>
<td>2699</td>
<td>2553</td>
</tr>
</tbody>
</table>

Summary of Accomplishments

- Leaves Unit Restructuring: The structure of the unit was reviewed and a key structural change was made. Instead of having a lead position provide some elements of supervision for the unit, it was decided that the unit would be supervised by a position with full supervisory authority. This new structure has provided a higher degree of accountability within the unit and a better supervisory/leadership structure as the SSC gains more clients.
- Monthly HR Recruitment/SSC HR Meetings: In partnership with Central HR Recruitment, SSC HR staff meet monthly with HR Recruitment staff with the goal of sharing information and best practices, and continuing to solidify the working relationships between the two teams, which is essential in order for recruitment handoffs to work seamlessly for clients. Meetings focus on process improvement initiatives, team building events and training.
- Satellite Office Space: In response to client feedback, in November 2014 the SSC HR team opened a satellite office located on core campus. This space provides services to student employees.
- Enhanced (End-to-End) Recruitment: In partnership with Central HR, the SSC HR team supported an enhanced model of recruitment, commonly referred to as End-to-End (E2E) recruitment. This initiative is a high priority as it moves from the pilot stage to offer the service more broadly.
- Process Mapping: SSC HR staff have been actively involved with Organizational Excellence (OE) on improving processes through process mapping to evaluate current processes and
consider improvements. Specifically, the processes for onboarding, leaves, staff salary actions, and appointments/contract extensions are being mapped. It is anticipated that new checklists, toolkits/user guides and training manuals will be developed and implemented upon the completion of the mapping.

- **Staffing:** The SSC HR workload volume remains high within all three groups: HR Generalists, HR Coordinators and Leave Specialists. Work is being done to backfill vacant positions to even out the workload and enable the HR Team to continue providing excellent service.
Operations Team

Like other SSC teams, the Operations Team underwent a number of changes during 2014–15. The year began with two new Service Desk analysts and a new Operations Manager joined for the first time in almost two years.

Metrics / Summary of Activity

The SSC Service Desk supported more than 20,000 requests during 2014–15, ranging from calls and emails to rapid response for incidents.

<table>
<thead>
<tr>
<th>Service Desk Metrics</th>
<th>7/1/14-6/30/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Volume</td>
<td>7967</td>
</tr>
<tr>
<td>Abandonment rate</td>
<td>10.09%</td>
</tr>
<tr>
<td>Average call time</td>
<td>0:04:29</td>
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<tr>
<td>Average Speed of Answer</td>
<td>0:00:14</td>
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Summary of Accomplishments

- **Efficiency Efforts**: Reduced licensing costs for Five9 (phone system) by switching from ServiceNow to track service desk calls. Coordinated enhancements to Five9 to update the ease and speed of connecting with a service desk analyst (removed menu options), providing a better customer phone experience.

- **ServiceNow Upgrade**: Successfully upgraded ServiceNow to the most current version, which included considerable advancements to the user interface to help enhance the user experience. Staff and client involvement in the project included user acceptance testing and training.
• Website: The Operations Team led the effort and launched a new SSC website, coordinating feedback from diverse stakeholders and providing a defined brand for the SSC.

• Feedback Efforts: Based on customer feedback, the Operations Team created a quarterly customer feedback survey, which provides a brief snapshot of service within the last 90 days. The initial survey had the broadest response to date and indicated an overall improvement in customer service.

• Strengthened Communication Efforts:
  o Enhanced incident process to ensure rapid response times and proper documentation of root cause/results
  o Initiated regular updates to knowledge base, providing better and more relevant information to client base
  o Proactively created a Client Engagement Plan to ensure proactive meetings with client base to discuss feedback and areas for improvement

• Accounts Payable Invoice Service: In partnership with Central Accounts Payable, the Operations Team initiated a new AP Invoicing Service project, including:
  o Presented to various campus & ANR units
  o Created standard operating procedures
  o Determined necessary system changes

• Technology Enhancements: In 2015–16, the SSC will be transferring case management systems in an effort to prepare for future strategic initiatives and streamline communication across diverse processes.
Organizational Excellence

Organizational Excellence team members are essential to the continuous improvement efforts of the UC Davis Shared Services Center. Their business process analyst expertise has been invaluable in continually updating and documenting procedures, as well as providing executable recommendations for improvements of service.

Summary of Activity & Accomplishments

- Built newly utilized Dashboard for communication of overall SSC efforts (See Appendix A) and division–specific dashboards to communicate SSC efforts with clients.
- Documented HR and Payroll processes for Onboarding, Staff Salary Actions, Contract and Appointment extensions, Lateral Career Track Changes and will be improving processes cross–functionally.
- In partnership with Operations Team, leading effort for technology upgrade
- End to end Payroll Review: Mapping of several processes – including timesheet submission, separation request, emergency check and overpayment – was completed. The review outlines a list of opportunities and recommendations.
- End to end Leaves Review: Mapping processes in the SSC departments and Central Benefits, with a goal to complete and move to identifying process improvements over the next 4–6 months.
- Accounts Payable Invoicing Service: Supported strategic effort to implement Accounts Payable Invoice service for the SSC clients and eventually to the rest of campus.
- Payroll Review
  - Metrics: Created mechanism to track error rates from the payroll supervisors’ review of all paper timesheets (those affecting paychecks vs. not) by processor and pay period.
  - Helped to improve quality and standardize for CMS Close Notes for emergency check requests so that it is clearer why the request was made and how it was resolved.
  - Completed process mapping of several major processes in payroll from department to SSC to central payroll.
  - Conducted project management training for SSC Payroll Manager and Supervisors.
- Developed client data dashboards incorporating all transactions, financials and client feedback — providing the ability to report valuable information quarterly to clients.
Future Plans

The UC Davis Shared Services Center strives for continuous improvement and will continue to grow and to develop its offering to meet its mission of the enabling the One UC Davis mission through partnership.

Future efforts include:

- Execute Technology upgrade, seeking to streamline, to simplify, and to continue to improve support to clients. The new technology is planned to pilot in early 2016.
- Revamp and update Service Partnership Agreements to provide shared expectations and goals and highlight key metrics of the SSC Team.
- Support, as requested, new units on the UC Davis campus
- Explore additional service offerings, including a “One Stop Shop” for new employee onboarding
- Continue to improve processes through process mapping and by utilizing LEAN principles
- Maintain a partner-focused, continuous improvement culture by executing proactive Client Engagement meetings and being responsive to the needs of clients
- Conduct enhanced communication efforts through a newsletter, updated website, and other communication methods.
- Continue to develop and to grow a service culture
- Execute pilot of campus-wide service to enhance operational efficiency of Accounts Payable Invoice payment
- Support other strategic efforts, as requested within the mission of the SSC, including preparation for the system-wide initiative UCPATH
Volume of Requests by Category

### Finance Request Types

<table>
<thead>
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Source: KFS

### Client Employee Headcount

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Source: ServiceNow/PPS
## Shared Services Center 2014–15 Annual Report

### Service Desk Metrics

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</tr>
</tbody>
</table>

Source: Five9

#### Service Desk Workload 7/1/14-6/30/15

- SSC Help Email Correspondence: 9176
- Incidents: 1647
- Ask a Question: 1241

Source: ServiceNow, Outlook

Note: All Incidents and Ask a Question tickets route to the Service Desk first. They are then routed to appropriate area for resolution if Service Desk is unable to resolve.

### Payroll

<table>
<thead>
<tr>
<th></th>
<th>7/1/13-6/30/14</th>
<th>7/1/14-6/30/15</th>
<th>Net +/-</th>
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</thead>
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<td>New Hires</td>
<td>2596</td>
<td>2717</td>
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<td>Separations</td>
<td>2629</td>
<td>2399</td>
<td>-230</td>
</tr>
</tbody>
</table>

Source: PPS

### Number of Incidents

- Finance: 613 (7/13-6/30/14), 237 (7/14-6/30/15)
- HR: 171 (7/13-6/30/14), 153 (7/14-6/30/15)
- Payroll: 1193 (7/13-6/30/14), 1257 (7/14-6/30/15)
- Total: 1977 (7/13-6/30/14), 1647 (7/14-6/30/15)

Source: ServiceNow