### **CLS Fiscal Shared Services**

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# **OpenMSU Shared Services**

- Handle growing enrollment
- Business processes take less time
- Lessens workload of Faculty and Staff
- Focus on improvement
- Reflected in Strategic Plan and OpenMSU initiative



### What CLS looked like

- Large and diverse College
- No reliable redundancy
- All departments operating slightly differently
- More and more things passed down to departments
- Ability to respond becoming hampered



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### **Shared Services Task Force**

- Developed a Task Force
- Interviewed all departmental staff
- Used feedback to shape what CLS Fiscal Services (CLS FS) would look like



### Questions

- 1. Can you describe a typical day in the office?
- 2. Walk me through how your job changes during the year? Fall, Spring, Summer.
- 3. What do you spend most of your time on?
- 4. What are the top three things that, if taken off your plate, would make your work easier/better?
- 5. What kind of assistance/support from the Dean's Office would you like for those tasks that you find most challenging?
- 6. Are there procedures or strategies that you have developed that might be helpful for other departments in the college?



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## Task Force feedback analyzed

- Students and accounting are significant issues, but not always for the same people.
- HR, Communication, and IT are also important parts of everyday work.
- Caution: Respondents also seem to value diversity in their work.



"The most time consuming is being the office manager and everyone comes to me [asking] how to do stuff. What I try to do every day is work on my to-do list, but anymore it seems like I am only working on immediate deadlines. I feel like I am staying afloat, but barely."



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### Creation of CLS Fiscal Services

- Reassigned accounting positions centrally when possible
- Pulled transactional grant accounting processes centrally
- Reorganized and standardized departmental positions and duties
- Established a goal to serve all departments in five years



### **CLS FS today**

- 17 units
  - 13 academic departments
  - 1 administrative office
  - 3 interdisciplinary units
- 750+ active indices, including
  - 85 state indices
  - 32 restricted gift indices
  - 393 designated indices
  - 266 grants



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# **CLS FS today**

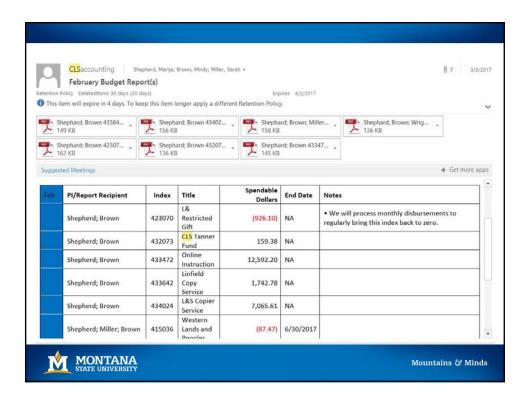
- AP (BPAs)
  - FY2015 1,061 transactions
  - FY2016 2,918 transactions
- CatBooks transactions
  - FY2015 19,210
  - FY2016 47,315



### **CLS FS - Tools**

- Shared Drive
- DocuWare
- CatBooks





### **CLS FS - Tools**

• State Salary Budget Development (SSBD)

Sample - FY2017 SSBD.xlsx



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### **CLS FS - Tools**

• #BestPractices





# CLS FS at a glance

Supports department operations and ensure compliance with university accounting practices by:

- Streamlining and standardizing accounting practices across the college
- Providing operational redundancy
- Providing a central fiscal resource and accounting training for staff throughout the college
- Providing single point contact for centralized units (OSP, UBS, etc.)
- Enabling the retention of organizational knowledge
- Allows departments more time to focus on their core mission

