

CLS Fiscal Shared Services

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Mountains & Minds

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



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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

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?*

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.”

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

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



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CLSaccounting | Shepherd, Marijo; Brown, Mindy; Miller, Sarah ▾ | 7 | 3/3/2017

February Budget Report(s)
Retention Policy Deleted items 30 days (30 days) Expires 4/2/2017
ⓘ This item will expire in 4 days. To keep this item longer apply a different Retention Policy.

Shepherd; Brown 43364...
149 KB

Shepherd; Brown 42307...
162 KB

Shepherd; Brown 43402...
156 KB

Shepherd; Brown 43207...
136 KB

Shepherd; Brown; Miller...
158 KB

Shepherd; Brown 43347...
145 KB

Shepherd; Brown; Wrig...
136 KB

Suggested Meetings + Get more apps

Feb	PI/Report Recipient	Index	Title	Spendable Dollars	End Date	Notes
	Shepherd; Brown	423070	L& Restricted Gift	(926.10)	NA	• We will process monthly disbursements to regularly bring this index back to zero.
	Shepherd; Brown	432073	CLS Tanner Fund	159.38	NA	
	Shepherd; Brown	433472	Online Instruction	12,592.20	NA	
	Shepherd; Brown	433642	Linfield Copy Service	1,742.78	NA	
	Shepherd; Brown	434024	L&S Copier Service	7,065.61	NA	
	Shepherd; Miller; Brown	415036	Western Lands and Donorfee	(87.47)	6/30/2017	



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CLS FS - Tools

- State Salary Budget Development (SSBD)

[Sample - FY2017 SSBD.xlsx](#)

CLS FS - Tools

- #BestPractices


Open Notebook.onetoc2

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