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

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
CLS FS - Tools

• State Salary Budget Development (SSBD)

Sample - FY2017 SSBD.xlsx

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