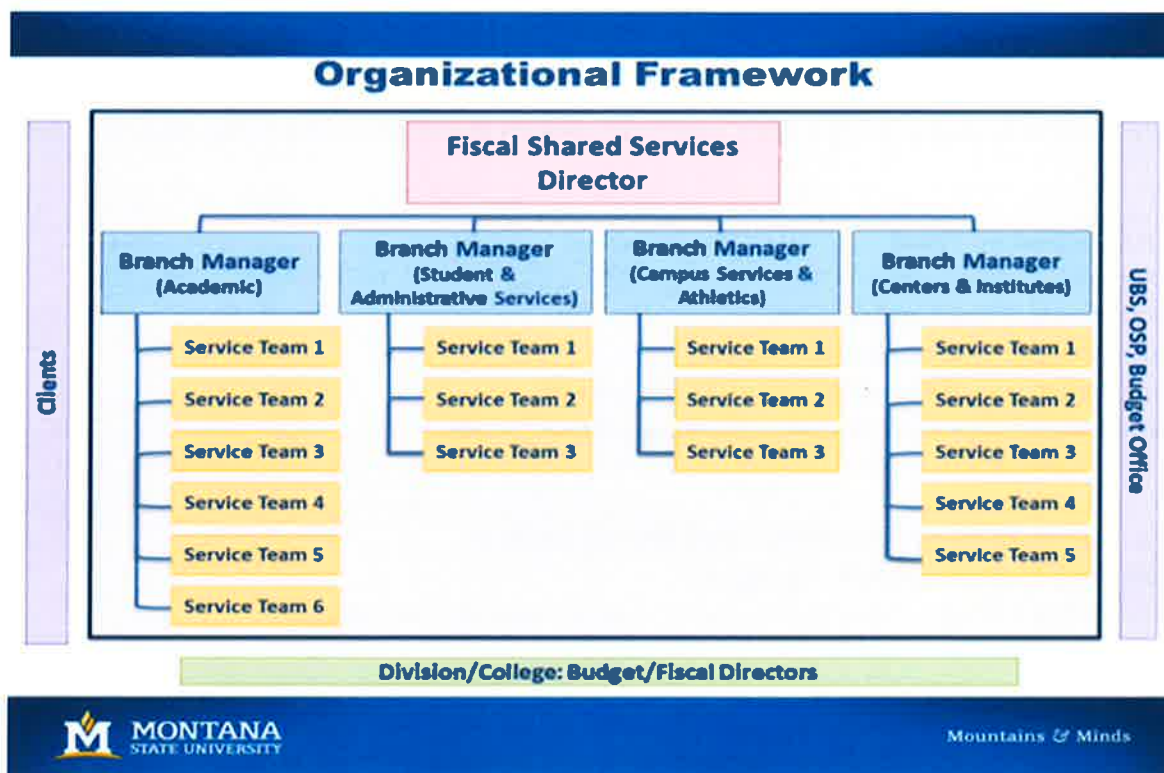


## FISCAL SHARED SERVICES (FSS)

The idea of shared services, from the OpenMSU initiative in 2010, aimed to analyze opportunities to share administrative functions and to improve information sharing, training and operational efficiency across the university. An initial phase of fiscal shared services, consisting of three pilots, began in spring 2015. The pilot groups each optimized ways to share basic administrative and financial services across their units, ultimately affording their departments the ability to focus more on services essential to their core mission.

Based on the successes of the pilots, a Fiscal Shared Services Task Force was created in February 2018 to steward a full rollout to campus. It consisted of Kim Anderson (Arts & Architecture), Jody Barney (Agriculture), Mindy Brown (Letters & Science), Jen Joyce (Student Success), Sarah Miller (Letters & Science), and Kasia Maison (HR). Their charge was to create the structural framework for fiscal shared services on campus. It was agreed that it should be 'home grown' and driven from the department level to make certain that changes added value. With this in mind, the Task Force initiated a structured, open process to elicit feedback, suggestions, and ideas to ensure the final configuration encapsulates both the needs of the staff performing the work, as well as the needs of the end users relying on the fiscal information.

Meetings with various constituent groups, continued communications, surveys, and 1-on-1 discussions across campus started 12/2018 and are continuing. The process was intended to lead to greater insight and understanding necessary to build the structural framework for Fiscal Shared Services from the ground-up.



The organizational structure of Fiscal Shared Services consists of:

1. Director of Fiscal Shared Services – Ben Dahlke will start on June 25<sup>th</sup> (nat'l search conducted spring 2019)
2. Branch Managers - Kim Anderson (Academic) and Cassandra Balent (SAS) started on May 1<sup>st</sup> and will:
  - Be charged with building consistent policies and processes for FSS.
  - Ensure that the output from each branch be correct and delivered in a timely manner.
3. Service Teams - the true power of fiscal shared services
  - Directed by a Service Team Lead, these teams are the "boots on the ground" accountants working on transactional fiscal processes for departments and units at MSU.

## **Benefits to Colleges/Units**

- Focus on primary mission, while administrative needs are provided for
- Retain control of funding decisions without managing transactional details
- Easier fiscal processes and systems
- Better financial data for decision-making
- Excellent service from trained staff with backup in times of turnover/absences

## **What problems are we solving?**

- Fiscal activities detract from a department's primary mission
- Many processes are still manual, inefficient and complex; slow, redundant processes are open to error
- De-centralization creates challenges for improving processes and providing training
- Economies of scale will help address common needs
- Compliance risks exist due to turnover & lack of focus
- Business process staff lack job satisfaction (per OpenMSU survey)

## **Current Overall Vision**

- One unified fiscal shared services team
- Multiple sub-teams serve the individual colleges/units
- Each college/unit has a primary point of contact who understands their unit and financials
- Best practices and systems are used throughout, with flexibility for unique business needs
- Vision provides guidance for project team; team designs the structure and makes recommendation

## **Vision for One Unified Team**

- Dedicated fiscal experts
- Community of fiscal professionals
- Advancement opportunities for FSS staff
- Implementation of consistent processes and systems
- Staff rotation for enrichment and to balance peak workloads

## **Examples of work to be performed by Fiscal Shared Services**

- Executing accounts payable - Paying bills
- Reconciling indexes - Ensuring accuracy of revenue/expenses and balances
- Reporting balances – How much is left in my budget or grant?
- Facilitating consistent, accurate and timely processing of paperwork to central business offices