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June 8, 2020

To: Daniel M. White, Chancellor

From: Nickole Conley, Executive Officer
Julie Queen, Vice Chancellor for Administrative Services

RE: Shared Services Recommendation

Per the [December 2019 solicitation](#), UAF received six proposals all addressing many of the areas requested (travel, purchasing, financial transaction management, and PPA duties) but not fully encompassing them all into two multi-function business offices. Two proposals were selected that most closely met the charge, submitted by Dave Read in the Geophysical Institute and Kellie Fritze in Facility Services; each proposer

1. Campus Travel Office
2. Proposal Development Office
3. Campus Purchasing Office

are proposed as a cost center, meaning as work is completed, the unit will be charged accordingly. - , thereby allowing but not requiring units to use the service as needed. Specialized pods will be managed by central administration or assignment to a unit. Oversight for functionality of both unit and specialized pods will be at the vice chancellor level, or as delegated. The proposal suggests the Associate Vice Chancellor for Financial Services as responsible lead. Full details can be found on the [Shared Services Center Proposal](#).

p is an additional theme and consists of a collaboration to provide multiple functions for the units in each pod. The primary benefit of these partnerships is backup for critical functions.

Suggested or partners, based on work-type affinity are as follows:

1. GI/IARC/ACEP/VCR
2. CEM/SOM/CLA/Library/eCampus/SSLL
3. CFOS/IAB/CNSM/IANRE/Museum
4. VCAS/VCSA/CAFO (including Chancellor's Offices and Provost Office functions)
5. CRCD/CTC

managed by the existing management structure (usually executive or fiscal officers) with oversight by the deans and directors of the participating units. Units involved in these pods would determine the cost structure to support the service.

Section 2: Suggested Revisions Moving into FY21

Create three Shared Service Centers for the following campus functions, with consideration of a fourth for Human Resources Transactional (PPA) processing, if feasible. All options below are intended for all UAF units to participate, excluding CRCD and CTC at this time, for the transactional areas listed. Services will be evaluated throughout the year along with evaluation of

Where any unit requests an exception, those will be considered on a case-by-case basis.

1. Travel:

All UAF units will be asked to fully transition travel support services to the campus-wide Shared Service Travel Office by December 2020. This will not be a recharge model but rather, funding will be reallocated as implementation plans are developed. The new Shared Service Travel office will be located in Lathrop Hall with Financial Services. All travel coordinator positions will report directly to a shared services travel manager, under the Associate Vice Chancellor for Financial Services. This reporting line will be separate from the travel compliance and audit functions, with an emphasis on individual traveler support and training.

Section 3: Other Supported Concepts

In addition to the items above, we support the additional actionable recommendations submitted in the collaborative proposal:

- ◁ Increase the number of Procurement Technicians (PT). UAF currently has 7 PTs, and this number could be increased in the new shared model as an expansion of the Facilities Procurement Office.
- ◁ Request the procurement authority level be assessed (currently \$5,000-\$25,000). This is relevant because the process for procurements between \$10,000 - \$100,000 is roughly the same. Increase levels with highly trained PTs. Additionally, Pro-Card limits could be increased to reduce the number of purchase orders that are processed. Increasing purchasing authority dollar limits and the available payment mechanisms, as appropriate, will create efficiencies and a more-timely process, supported by the PT team.
- ◁ Implement (finalize) the JV workflow process. This automation will increase efficiency and reduce the number of hours at the unit and central level dedicated to routing and processing of paper.
- ◁ Implement Paperless Job Processing (PJP) for all contract extensions for all employees. This is currently in place for all faculty, term-funded staff, and student jobs. Including staff will reduce labor costs involved in processing individual paper job forms. This could be implemented in a Human Resources/PPA center or on its own.
- ◁ Create a Shared Services Advisory Board (SSAB). The current Financial Services Advisory Group is made up of school/college/institute Executive Officers and Business Managers across all UAF units and is chaired by the Associate Vice Chancellor for Financial Services. The SSAB would utilize this same group, essentially expanding the scope to include the responsibaboray(JoABT/Fd2 Tf1 0 0

We want to thank Dave Read, Kellie Fritze, Amanda Wall, Amber Leytem, and the Financial Services Advisory Board unit leadership for providing input to this model and transition planning. This additionally builds on ideas shared in the Expedited Administrative Services Review, and is a continued effort to move forward in a sustainable and successful way, understanding the desire for increased backup and transactional support, and the current fiscal situation.

If you have questions, we are available and look forward to your decision.