Roots to Results

The Canton-Potsdam Story

Phase 1

Leadership
- Shared Executive Leadership
- Core
- Drive the Change

Foundation

Phase 2

Results
Defining Shared Services

- What is Shared Services?
- Shared Services is...
- Case for Administrative Shared Services
- Efficiency vs. Effectiveness
- Benefits of Shared Services

Change Management

Eight Steps To Successful Change
- John Kotter

1. Create a guiding coalition
2. Develop a clear shared vision
3. Communicate the vision
4. Empower people to act on the vision
5. Create short term wins
6. Consolidate & build on the gains
7. Institutionalise the change
8. Establish a sense of urgency

Foundation
Defining Shared Services

What is Shared Services?

Shared Services is...

Case for Administrative Shared Services

Efficiency vs. Effectiveness

Benefits of Shared Services
Shared Services:

- A business process

- A new approach in Service Delivery

- Focus is to deliver a single, standardized approach for processing all business transactions
Defining Shared Services

What is Shared Services?

Shared Services is...

Case for Administrative Shared Services

Efficiency vs. Effectiveness

Benefits of Shared Services
Shared Services is:

- A support function focused on:
  - customer satisfaction
  - efficiency
  - cost effectiveness
  - continuous improvement.
  - providing better services
  - emphasize value creation

Shared Services is not:

- A re-engineering of existing support services without a consideration of the larger process that they support.

- A "blunt instrument" for cost reduction
Defining Shared Services

What is Shared Services?

Shared Services is...

Case for Administrative Shared Services

Efficiency vs. Effectiveness

Benefits of Shared Services
The Case for Administrative Management Shared Services

- Reduce risk

- Free up institutional resources to focus on mission-based programs

- Ensure greater standardization allowing for more transparency

- Enable better decision-making

- Make adoption of new state-wide and SUNY-wide requirements easier

- Deliver greater efficiencies and cost savings for each institution.
Defining Shared Services

What is Shared Services?

Shared Services is...

Case for Administrative Shared Services

Efficiency vs. Effectiveness

Benefits of Shared Services
Efficiency vs. Effectiveness

Being efficient does not mean you are effective in reaching your goals.

"Efficiency is doing things right; effectiveness is doing the right things."
- Peter F. Drucker
Defining Shared Services

What is Shared Services?

Shared Services is...

Case for Administrative Shared Services

Efficiency vs. Effectiveness

Benefits of Shared Services
Benefits of Shared Services

Implementation of the Shared Services strategy will produce a number of beneficial outcomes:

- Eliminate inefficient spending that results from duplicated services

- Promote agility and innovation within the institutions by improving speed, flexibility, and responsiveness

- Focus more institutional resources on core mission requirements rather than administrative support services

- Spur the adoption of best practices and best-in-class ideas and innovations

- Reduce the support costs of redundant IT resources
Change Management

Eight Steps To Successful Change
- John Kotter

1. Establish a sense of urgency
2. Create a guiding coalition
3. Develop a clear shared vision
4. Communicate the vision
5. Empower people to act on the vision
6. Create short term wins
7. Consolidate & build on the gains
8. Institutionalise the change
Create a Sense of Urgency

- Conduct your SWOT Analysis

- Identify potential threats; what could happen in the future.

- Examine opportunities that should or could be, exploited.

- Start honest discussions - get people talking!

Reminder: Have a Sense of urgency!
Create a Guiding Coalition

- Identify the true leaders (key personnel) of your organization / departments.

- Work on team building within your key people.
Develop a Clear Shared Vision

- Determine the values that are central to the change.

- Develop a short summary that captures what you "see" as the future of the institution.

- Practice your "vision speech" often.
Communicate the Vision

- Talk often about your change vision (i.e.: what is Shared Services?)

- Openly and honestly address people’s concerns and anxieties.

- Lead by example.
Empower People to Act on the Vision

- Recognize and reward people for making change happen.

- Identify people who are resistant to change, and help them see what's needed.

- Take action to quickly remove barriers.
Create Short Term Wins

- Look for "low hanging fruit"

- Reward the people who help you meet the targets.
Consolidate and Build on the Gains

- Analyze what went right and what needs improving.

- Set goals to continue building on the momentum you have achieved.

- Continuous Improvement.

- Keep ideas fresh.
Anchor Changes in the Institutional Culture

- Talk about progress every change you get.

- Tell success stories.

- Publicly recognize key members for their hard work and dedication to the institution.
Drive the Change
Leadership

Joint Executive Leadership

- Comprised of Presidents, Vice Presidents, and Deans of both SUNY Canton and SUNY Potsdam

Shared Services Steering Committee

- Natalie Higley, Vice President for Business Affairs/CFO (Chair)
- Kyle Brown, Chief Information Officer
- Mary Dolan, Assistant Vice President for Human Resources
- Liz Erickson, Faculty Representative, SUNY Canton
- Walt Conley, Faculty Representative, SUNY Potsdam
- Greg Kie, Public Relations, SUNY Canton
- Alex Jacobs, Public Relations, SUNY Potsdam
- Shawn Miller, Business Office, SUNY Canton
- Mark Martinchek, Business Office, SUNY Potsdam
- SGA Representative, SUNY Canton
- SGA Representative, SUNY Potsdam
Phase 1

- Vice President for Business Affairs / CFO
- Military Veterans Coordinator
- Human Resources and Payroll
  - February 2013 HR/Payroll was fully shared
- Inter-Library Loan Specialist
- Environmental Health & Safety
  - Director of EH&S
  - Life Systems Safety Manager
- University Police
- Procurement
  - Joint P-Card Program
    - Goal: December 2013 will be fully shared
- Accounts Payable & Travel
  - Goal: December 2013 will be fully shared
- Budget
  - Standardized campus budgeting process across the campuses
- Student Accounts
  - Implementing Higher One’s CashNet with standardized processes across both campuses
- Central Printing & Duplicating
- Information Technology
  - Shared Chief Information Officer and Chief Technology Officer
- Enterprise Risk Management
  - Compliance Training Coordinator (Shared)
- Sustainability Coordinator
- Upholstery Shop
- Institute for Arts, Sciences & Technology
Phase 2

Continue to work on:
- Procurement
- Accounts Payable & Travel
- Student Accounts
- Information Technology
- Institute for Arts, Sciences & Technology

Additional Areas to be Explored:
- Energy Management
- Capital Project Management
- Revenue Accounting
- Financial Aid Call Center
Results

SUNY Canton - SUNY Potsdam
Shared Services