



NC STATE UNIVERSITY

March 17, 2014

MEMORANDUM

TO: Executive Officers, Deans and Department Heads

FROM: Charles D. Leffler, Vice Chancellor for Finance and Business 
Richard Linton, Dean for College of Agriculture and Life Sciences 

SUBJECT: UBOD/CALS Shared Services Update

Since the Fall update, Shared Services efforts have progressed with the targeted partnership between University Business Operations Division (UBOD) and College of Agriculture and Life Sciences (CALs) to implement college-based shared services.

Progress to Date

UBOD and CALs engaged the ScottMadden Group and received its final report advising the CALs Business Center operations. CALs, UBOD and other university partners have been collaborating to achieve a new business model for the college. Under this new direction, it is our hope the CALs Business Center can serve as a model for delivering business services for other units on campus.

An Implementation Team will work to have much of the new center operating by September 2014. Leading this effort are Jeff Mullahey, Department Head, Crop Science; Sylvia Blankenship, Associate CALs Dean for Administration; Jim Klingler, Acting Executive Director for UBOD; and Matt Ronning, Project Manager for implementing the ScottMadden recommendations.

Implementation Plan Areas of Focus

The business center's structure will include the following operational groups and services:

Customer Service: These business professionals will serve as a single point of contact for faculty and staff, eliminating the need to search for an expert. Team members will be aligned with specific CALs departments, providing a familiar, knowledgeable face to customers.

Consultative Services: Three consultative groups will focus on budgeting, pre-award research administration, and post-award research administration. These groups will provide a critical customer service function by providing analysis and expert advice to department heads and faculty on making business decisions.

Accounting Services: These accounting professionals will provide expertise in financial systems, policies and standard practices of college business services, handling a high volume of common business transactions.

Operations Support Team: After the new center is open for business, the Operations Support Team within the CALS Business Center will deliver and coordinate training for center staff and customers, support continuous improvement activities, and support center technologies.

Technology and case management: Partnering with the university, the CALS Business Center will implement the Case Management and Knowledge Base system. Case Management will enable business center staff to track and share customer requests, facilitating quick resolution of customer requests. Knowledge Base is a tool for sharing relevant information about policies and procedures.

Accountability: Service level agreements (SLAs) will help all stakeholders to understand their responsibilities by defining what a customer must do to request a service and what the center must do to complete the service. The SLAs also will define how long customers should expect the center to complete service requests.

Training: As part of the implementation, a team will train business center employees regarding the technical skills for service delivery, customer service skills to create a consistent level of support to the college, and team building skills to optimize their collective talents. This team will also train faculty and staff to make the most effective use of business services.

Communication: A college-wide update is planned for CALS on April 11, which will keep CALS faculty and staff informed regarding the implementation and provide an opportunity to discuss the process thus far with leadership. Additional details about this event will be sent out shortly.

Additional information about the ScottMadden study can be found on the CALS website at www.cals.ncsu.edu/scottmaddenproject.

Recent Updates

- 10/22/13 Memo from Vice Chancellor Leffler and Dean Linton: "CALS Shared Services"
<http://ofb.ncsu.edu/102113-CALS-UBOD-Final.pdf>
- 8/19/13 Memo from Vice Chancellor Leffler: "Evolution of Shared Services in Response to Changing Campus Needs"
<http://ofb.ncsu.edu/081913-Memo-SharedServicesEvolution.pdf>

cc: CALS Business Center Implementation Team
 Business Leads