

IUPUI Budgetary Affairs Committee  
Tuesday, September 11 at 1pm in UL1116.

Attendees: Joyce Mac Kinnon, Dawn Rhodes, Lisa McGuire, Andrew Winship, Reed Smith, Marta Anton, Andrea Copeland, Brian Krohn, Michael Weaver, Karl Mac Dorman, Jack Schaaf, Catherine Brown, James Kennedy, David Bivin, Stephen Randall

#### Agenda

1. Introductions
2. Role of the Committee: To represent the faculty when fiscal issues that cross budgetary units are being considered  
The role of the BAC is to represent the faculty when fiscal issues cross academic units. Committee members should be aware of these issues and seek out input from their faculty and deans. Examples might include : parking, online presence, and the possibility of a medical campus. Generally, issues that transcend units. Cluster conversations will likely be structured differently this year – and it will be one that will not require BAC members to attend (Dawn Rhodes).
3. Centralization of Student Services (presentation via video conference by Jim Kennedy) Q&A

Jim Kennedy – university student services & Steve Kucher : Brief overview of the process of centralization.

2010/11 benchmarking study done to include student services – estimated a cost savings could be generated across all 7 campuses. Started working on this in Summer 2012. First phase, review high level processes at all campus. Look at business process, for ourselves and to see where the savings might be – Report is available online. Looking at back office business practices – not strategic processes with a goal of combining and leveraging resources.

Phase 2, presentation mode, took report out to the campuses asked for feedback.

Phase 3, start the process to see how we can do things better, what can be moved into a shared services model -related to areas of admission, student records, financial aid, advising systems, bursars, security.

There is an advisory council for the project – several IUPUI members.

185 business processes to go through – to date have completed 110. Goal is to complete all by the end of the year and to create efficiencies and better services to students. The campuses are different in terms of how they process admissions, Pell grants, etc. ERP Current system is very expensive to run – better to have experts that could run the processes for all campuses.

Moved key staff of IUB into their office and created interim positions to oversee these processes. We are evaluating the technology as well. How can campuses move into a one stop shop model --which IUPUI has already instituted? Seeking to combine offices for better service.

We don't call it centralization, use the term shared services. Partnership with the campuses done in collaboration.

Member: How does efficiency relate to effective services?

Jim: Goal is to not harm effectiveness, redirect resources to increase effectiveness of services. There are several manual tasks that could be enhanced with technology. We do not want to see a diminished level of service.

Member: what is the process for evaluating your progress in order to know that you are meeting your goals?

Service level agreements. When we determine that a service could be shared – we devise a means of measuring it measured – we are working on some of the metrics now.

Member: What are your plans to make sure your technology infrastructure can support these changes?

In some case, one size does not fit all – we will try to make the system work as best we can – some of those issues will be addressed during this process.

Member: University budget needs to support the technology not the campuses – otherwise campuses will fall behind on shared services. Are there going to be mirrored roles at each campus – or will students and units have to go to IUB to solve problems?

Jim: shared service or local, will decide which for each service. Many student services will remain local. If the back office is more efficient you will be able to give students one on one help, which will be beneficial to retention. I don't see where a student would be sent away from campus to get service.

Member: is this truly experimental? Can we retract what's been done?

Jim – we will work on problems with the model to make it better. There might be a situation where a process would need to be turned back to local level. Looked at other organizations – to observed problems they encountered.

Member – A corporation has a different set of goals – I get concerned when we look at the models of corporations to solve problems serving our student?

Jim: When we talked to Lilly, they have service centers throughout many countries –which they have developed into 4 service centers. Looked at their lessons learned. We are not being driven by profit but there are still lessons to be learned.

Member: Inside track on Lilly, they keep reinventing their processes – this is their third time and they are back to where they were 20 years ago. Administration drives change not need. Emphasizing concern over using Lilly as a model.

Jim: We also attended a conference at Harvard which addressed student services. Looked at better ways to change administration costs and save money to use for other purposes.

Member: if you save money – at the university level, will we have that money or will we pay more for similar levels of service?

Jim: what needs to stay at the campus level will and what is left will be used for other initiatives.

Member – examples of back office services that are moving to shared services?

Member- concerns me that you are talking about business process – it doesn't fit well with student services. Think carefully about the language. Not sure that business models have the answer.

Dawn: We have similarities with business. We want to deliver good customer service.

Jim: Can provide a list of processes. Acknowledges confusion around the terms.

For example, we receive files related to federal student loans every day, they load automatically; we have to examine eligibility – some students are ineligible , some are eligible for certain pieces, lots of errors come in with those files. People go through and look at those and address the errors.

When we looked at that process, it is done seven different ways – some campuses run a report, others a paper form, some have shared spreadsheets, or don't do it until the end of the week.

How can technology make that better – can we use an algorithm to identify names that don't match etc.

That process takes a lot of time. Some campuses have outstanding process and other do not.

Member: Please provide a glossary of terms used to increase transparency.

Member: Specific example, travel management – when we went to the new system. There is confusion by what is exactly meant by back office – seems like all of travel management is back office. It is impossible to talk to someone unless you have a good secretary. The system seems broken.

Member: Travel has not gone to shared services. It's a technology problem – a bad process.

Member: the lines between back and front offices get blurred.

Jim: concern is valid – that is why we have staff members from all the different campuses – utilizing the campus experts to create this model. We value input from experts in different areas

We have the people soft systems in place to handle these shared services – the system running travel is faulty.

Dawn: Could you survey the staff working on the different committees – find out if their input is being heard and considered?

Member: this relates to assessment.

Dawn: survey with no repercussions.

Jim: Each review has several people involved and then it moves to various councils for review. Not sure if a survey would give us more input. There are several opportunities to be heard at meetings and through representatives.

Member: Get feedback after the processes are in place and at that point staff feedback would be key to consider.

Jim: Yes, this is considered part of this process.

Member; all campuses will use same tools as well as language?

Jim: Yes, and the same practices

Member: It seems common sense that we use the same tools and processes. Are their processes that involve human driven tasks or is it all technology?

Jim: some are driven by technology. Some are not – how we put together the flow, when you get people together and they share their ideas – you realize that sometimes people don't think about why they do things the way they do. That's the way we've always done it comes up over and over again.

Member: If there are two optimal processes at two different campuses – will the optimal processes be allowed to continue alongside the new process?

Jim: we would have to consider that when it occurs – we might have to make exceptions – need to be flexible with specific services.

Joyce: talk to your units to see if they identify anything that this committee needs to address.

Member: have all the deans been made aware that we are changing the way we've done things?

Dawn: No

Member – the deans might think differently about how they use their own BACs. That could change the way they use it.

Dawn: Not appropriate to tell RCMs how to spend their budgets.

Resource Planning Committee meeting – is a resource for information about what is going on with the different units – Joyce will report back to this committee.

Meeting adjourned 2:05.