OE RESOURCE REQUEST APPLICATION

University of California, Berkeley

I. SPONSORSHIP

A. Initiative

Initiative	Shared Services Implementation Team		
Initiative Manager	Thera Kalmijn		
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B. Sponsorship

Sponsor Name	John Wilton, Vice Chancellor of Administration and Finance		
Sponsor Signature		Date	
Sponsor Name	Keith Gilless, Dean, College of Natural Resources		
Sponsor Signature		Date	
OE Program Office Signature		Date	

C. Give the title of the resource

Shared Services Implementation

II. PROBLEM STATEMENT/CASE FOR CHANGE

A. Identify and describe what needs the proposed solution is seeking to address.

1. Service levels and availability of administrative resources vary from department to department, creating an environment of service 'haves and have-nots" and uneven service quality for faculty, staff, and students. In addition, the current burden of administrative processes on faculty and staff is too high. There is a need to reduce the administrative burden and create a standard, foundational level of administrative service across the campus to support the ability of faculty, staff, and students to fulfill the academic, research and service missions.

During the Design Validation work, the Shared Services team found that service quality was largely not measured (with the exception of a few units where satisfaction surveys have been done) or systematically managed. Service quality was determined by the performance of the individual (e.g. departments have their "stars"). Shared Services team found pockets of service training (e.g. the RSSP "Stars" training), but no consistent service culture or training across departments.

In addition, many performance management elements that support a high performance service culture are inconsistently applied or, in some cases, absent. Many staff currently do not receive regular performance evaluations; do not set annual goals or have mid-year reviews; and historically under performers have been difficult to move out of the organization. Departments report that when performance evaluations are conducted, performance ratings are often inflated and do not often follow the expected distribution curve. In addition, many staff do not receive regular training to help keep skills current or to help them develop skills for

future promotion opportunities. Career paths for staff are also unclear for staff, leaving high performers few options for promotion.

Without the performance management elements described above, it is not possible to build and maintain a consistent high performance service culture that provides the university with outstanding administrative support and the staff with career opportunities.

2. In order to help offset future projected budget shortfalls the university needs to reduce resources allocated to inefficient and ineffective processes. The administrative processes in the areas of Human Resources, Financial Services, Information Technology Client Services, and Research Administration are often inefficient, ineffective, redundant, localized, uneven in terms of quality, and supported by manual, off-line, or other departmentally-developed systems.

IT End User support provides a clear example of the inefficiencies and risks inherent in the current environment, despite the best efforts of diligent staff in the departments. In conducting process mapping workshops in December 2011, Shared Services discovered that within the approximately 15 departments represented in the End User Support discussion; that there were at least six different help desk ticketing systems being used (systems that don't talk to each other); that many departments used no ticketing system at all or used them sporadically; that several departments were staffed by a single IT resource who had no backup to cover planned or unexpected absences. In addition, departments were using a variety of user data backup systems or not running data backups for all users. There was also significant variation in the method of applying software patches and keeping software up to date on machines and many versions of software products being used by users within a department.

In the area of Human Resources and payroll, Shared Services discovered through the process mapping workshops and stakeholder interviews that: there is little automation of department level human resources work; current workflow tools require double data entry; and the error level is high due to lack of tracking or efficient workflow (e.g. requests are currently communicated verbally, by email, by instant message, etc.). The lack of a clear workflow and rigorous process introduces significant opportunity for errors. In addition, the number of staff with access the Human Capital Management system is in the hundreds. Departments can enter employment changes directly into the system which ultimately feeds the payrolls system. In our discussions, we regularly heard of HR errors leading to incorrect payments which needed to be corrected.

In addition, the departments represented in our process mapping workshops, site visits, workgroups, and stakeholder interviews regularly reported the need for standard processes, tools, and support in preparing visa and immigration work and more support for faculty or staff relocations. These activities are currently handled at the department level by individuals who may have little or infrequent experience processing visa and immigration paperwork leading to potential delays or errors.

In the areas of Research Administration and Financial Services, departments reported frustrations with lack of clarity on how to move work through the process from beginning to end and resolve problems when they arose. In Research Administration, some departments also reported difficulty in finding or keeping sufficient qualified resources to do the work and having inadequate back-ups in place to fill staffing gaps.

In all areas, units found problem resolution difficult due to lack of clarity in processes, roles, and accountability, particularly when the transaction involved resources outside of their own department.

Due to the inconsistency and lack of documentation of current processes, it is very difficult to realize savings from process improvements. In addition, inconsistencies and lack of transparency in processes significantly increase risk due to errors, which create further financial risk in the form of costly rework or fines. The university needs to document, streamline, and standardize processes and enable processes with efficient, user-friendly technology solutions to reduce costs and risk associated with administrative work.

3. The staff doing the finance, human resources, research administration, and information technology work in administrative and academic units are often isolated and without peers to rely upon for consultation, support,

and backup during normal absences. This creates delays in service provision and does not facilitate the sharing of best practices or foster the growth and development of our staff. In addition, career paths for staff in departments are often very limited making it difficult to reward, promote, and leverage the talents of our best staff.

B. Describe the solution that is being proposed to meet the identified need(s).

After a detailed study of the issues and a deep engagement process with the campus community, the Shared Services Implementation Team recommends creating a single, matrixed Shared Services organization to deliver Human Resources, Information Technology, Financial Services, and Research Administration services. The matrixed organization structure and accountability model centers on a service team structure, shared accountability with central campus functions, and clear accountability to units being served. The design and implementation of the Shared Services Center is aligned with the *Guiding Principles for Shared Services* (see attached). The Shared Services organization will serve all campus units and there is no opt-out alternative.

The Shared Services Center will be staffed with functional subject matter experts using standardized processes and efficient systems to deliver consistent, high-quality, administrative services to the campus community in support of Berkeley's teaching, research, and services missions. The work and the client service delivery of the Shared Services Center will be enabled with work flow, work request tracking, and other technology systems to maximize efficiency, reduce risk, increase operational effectiveness, and improve the client experience.

In the first 24 months of implementation (Phase I), Shared Services will deliver a standard, foundational level of service to client units. Once the foundational level of service is established and is meeting operational targets, the organization will consider integrating higher service levels as required by particular units on the campus. Shared Services will ensure service quality through a robust governance model; monitoring and managing by key metrics; rigorous performance management; skills assessments; and on-going staff learning and development. .

The Shared Services Center will be supported through a funding model which determines costs to units based on use. For some currently under-served units who may not be able to afford the foundational level of services offered by Shared Services, the funding model may require a central campus subsidy. If a subsidy is required, it may only be for an interim period until service delivery costs are reduced by process and operational efficiencies. The funding model is still in progress and will identify and quantify where these funding gaps exist and recommend a solution.

For units where services levels are currently higher than the initial foundational level of service planned for the first 24 months of Shared Services operations, those services will be identified during pre-implementation work for the unit. Units will be allowed to keep higher levels of service and pay for them directly with the requirement that the unit migrate or integrate any relevant systems to align with the systems being used in Shared Services (e.g. IT help desk ticketing systems). During the Service Level Agreement development, all levels of services will be clearly identified and responsibility for managing and paying for these services will be clearly documented.

Shared Services will put into place a number of practices and tools In order to ensure that savings are not eroded by departments creating new shadow systems and staffing. First, Shared Services will adopt a proactive and robust "client relationship management" program with the units they serve. This program will ensure that Shared Services is proactively working to: understand the needs of the campus units; address service problems quickly and effectively; and implement new systems, processes or staffing modes in response to campus unit needs. Shared Services will also create monthly dashboard reports to track staffing levels in Shared Services and work with Human Resources to identify and review job postings outside of Shared Services for in scope job codes. In addition, Shared Services and the functions will limit relevant systems access to those positions in Shared Services and departments who are intended to do the work.

Shared Services will set staffing ratios with input from functional leaders based on higher education and other industry benchmarks and campus benchmarks (e.g. ERSO and Human Resources Center). Shared Services will set a range of appropriate staffing ratios; benchmarking staffing ratios by service team, and set a staffing ratio target for each service team.

While some staff will remain embedded in the departments they serve (as determined by business

requirements), most staff will be located in a single, off-campus center. To support the ability of Shared Service Center staff to interact with client units on campus, the space strategy will include two to three smaller, strategically located, on-campus drop-in centers.

The Shared Services model will align and/or integrate with other OE initiatives (i.e., BearBuy, CalTime, etc.) and system-wide projects (i.e., UCPath Initiative).

As a result of the Shared Services, most units will likely need to undergo some level of realignment in the unit as some positions currently support work that is in scope for Shared Services and other work that will stay in the unit. While this in-unit realignment is out of scope for Shared Services, Shared Services is helping to initiate the request for support for these efforts through OE, Human Resources, and the Office of the EVCP. It is likely that HR and the Office of the EVCP will take the lead in the unit realignment efforts. To support both the Shared Services Implementation and in-unit realignment, a unit implementation leader will be identified for each unit during pre-implementation and implementation. The Shared Services team will hire additional implementation analysts to support pre-implementation and implementation work and ensure good coordination between the Shared Services efforts and the in-unit realignment efforts.

The Shared Services team (with the support of COrWE and unit implementation leaders) will also develop pre-implementation resources and toolkits in that include: change management support, training and tools; unit staffing impact assessments; skills assessments; IT assessments; work in progress assessments and transition plans; etc. These pre-implementation resources and toolkits will be developed in coordination with the in-unit realignment teams to streamline data gathering and reduce impacts on the units.

In order to ensure that work in progress will not be interrupted, Shared Services will use the work in progress assessments and transition plans (to be developed) to created detailed handoff schedules. These schedules should be reviewed and approved by the unit implementation leader and the appropriate Shared Services implementation manager. In addition, the Shared Services savings model includes some increases in staff in the early months of implementation to allow for extra support during the transition. The savings model assumes that staffing levels decline over time as efficiencies and use of technology tools increase.

C. Describe the alternate approaches you evaluated in the process of developing this proposal and why those alternatives were not selected.

In addition to the single-center model, our Shared Services Implementation Team evaluated several other models with various accountability options:

1. a multi-center model in which each center reports up to the VCAF;
2. a multi-center model in which each center reports to one or more Deans/VCs;
3. a multi-center model in which each center has dual reporting lines to the VCAF and Dean/VC;
4. a virtual model in which staff stay embedded in the departments but report to a Shared Services organization under the VCAF;
5. no Shared Services organization –continue with current campus unit structures and governance and focus solely on changing the processes and systems.

While each of these models had different advantages, the Shared Services Implementation Team worked closely through stakeholder groups (e.g., Organization Structure and Governance Workgroup, Liaison, and Steering Committees, leadership meetings, etc.) to conduct a design validation and determine the “best fit” solution. Based on these design validation efforts, the Shared Services team, determined that these alternatives would create barriers to standardization, continuous improvement, and the development of a consistent service culture. Additionally, it would require a fragmented and more complex leadership structure that would risk coherence and sustainability.

III. IMPACT AND STRATEGIC ALIGNMENT

A. Describe how the proposed solution aligns with the OE goals:

- Reduce administrative costs and enable the campus to direct more resources to teaching and research
- Advance an effective and efficient operating environment
- Instill a culture of continuous improvement that leads to high quality performance and outcomes

The proposed Shared Services Center will align with OE goals by:

- generating hard savings that total $12-15 million in annual administrative costs (pending finalization of savings model on March 31, 2012);
    - Note: operating investments are required and savings occur over time. Current preliminary projections show Shared Services operations breaking even by the end of year two and then generating approximately savings of (. $7.5M by end of year three and full year over year savings in year four.)
    - Savings of $12M to $15M are gross of the investment budget requested as part of this proposal (so savings before investment expenses). Savings ***net*** of costs will be realized by the middle of year five.
    - The projected implementation costs in the attached budget total $19.4M. For detailed costs, see section VI.C. and attached "*Executive Summary Campus Shared Services Implementation Team Budget Analysis*":
    - These estimates and the timing of savings are preliminary and will be further validated with the completion of the funding model work. In addition, the Shared Services Implementation team believes that further savings will be possible beyond years three to five as services are brought into the shared services model and further efficiencies are identified.
- generating soft savings resulting from an improved work environment cultivated by the reduction of time spent on administrative tasks;
- creating a single, matrixed infrastructure staffed by functional subject matter experts;
- creating a flexible and scalable organization that can be adjusted as demands and funding change;
- establishing common standards, procedures, and practices;
- improving standardization and automation of processes and reducing duplication of effort, error rates, shadow systems, compliance risks, and fines;
- targeting a 35% improvement in efficiency by year five through our application of the Lean Six Sigma process improvement methodology;
- standardizing and leveraging technology to minimize paper and manual work and eliminate the duplication of systems across campus;
- utilizing technology to support the processing and approvals associated with in-scope administrative work, from the initiation of the work request to the completion of the work request and recording of information in the proper system of record (e.g. HCM). Technology should meet the local, shared services, and central administration business needs;
- ensuring service quality through developing and managing service level agreements, leveraging service satisfaction metrics to improve operational performance, establishing clear points of contact and cross-functional coordination across teams, and providing enhanced training to staff –functional, technical, and service delivery;
- developing a robust performance management process and utilizing goal setting and 360 feedback loops to evaluate individual performance;
- freeing up to 100,000 square feet of administrative space on campus to be redirected to research and teaching. Note: The Vice Provost for Teaching, Learning and Academic Planning and Facilities, Cathy Koshland, is developing a plan to manage the capture and efficient and effective redeployment of space vacated by positions that are moved to the off campus Shared Services center.

B. Identify any other anticipated benefits in implementing the proposed solution.

Implementing Shared Services will benefit the campus by:

- developing a strong service focus in delivering in-scope administrative processes campus-wide;
- allowing academic leadership to focus on academic and programmatic priorities;
- creating a broader bench of resources (i.e., a community of practice) and technology tools that will support processes and lessen the administrative burden on faculty, staff, and students;
- allowing departments and units to focus on strategic and programmatic priorities;
- creating clear communication channels through a matrixed organization and clear decision-making roles, accountabilities, and governance;

- serving as a catalyst for campus-wide improvements in service culture and performance management;
- developing clear career paths and professional development opportunities;
- creating financial savings through better technology management that leads to energy reduction (i.e., Big Fix – a technology tool that monitors and maintains computers, updating software automatically and determining when machines should be powered down due to inactivity).

C. Identify the risks of not implementing the solution.

The campus has numerous redundant, departmentally-developed systems of uneven quality. We are duplicating work and developing different ways to accomplish the same tasks without often following the same standards and protocols. Most importantly, the staff doing the finance, human resources, research administration, and information technology work in administrative and academic units are often isolated and without peers to rely upon for consultation, support, and backup during normal absences. This creates delays in service provision and does not facilitate the sharing of best practices or foster the growth and development of our staff.

Without the Shared Services implementation, the campus continues to run these risks and forfeits the ability to save at least $12-15 million per year. The loss of these savings in turn may jeopardize the operations and academic mission of UC Berkeley as costs we are already committed to continue to grow (e.g., health care costs). As fiscal operations of the University rely more heavily on student tuition and donors, it is essential that we identify opportunities to reduce the administrative costs in order to allocate those funds to teaching, research, and other programmatic priorities. If we do not implement Shared Services, absorbing further budget cuts from the state might lead to reduced and/or unsustainably low staffing levels in some units.

The campus will face increased compliance risks if processes are not effectively streamlined, documented, and consistently followed. Standardization of process will reduce federal audit risk and other compliance risks such as appropriate maintenance of employee files.

Additionally, the campus' inability to support the implementation of a Shared Services Center will likely jeopardize the success of other large scale OE efforts by diminishing employee trust. This in turn has the potential to affect staff morale.

D. Describe the constituency that is intended to benefit from the proposed solution (e.g. students, faculty, staff, 1-many units)

Shared Services will benefit the entire campus as resources currently spent on administration will be freed up and redirected to teaching, research, and programmatic priorities. The direct beneficiaries of Shared Services include:

- faculty and staff in all campus units;
- all students who interact with administrative services and/or are employed by the University.

E. Describe the extent to which this proposed solution is a collaborative effort either within campus or with external partners.

The Shared Services Implementation Team has worked and will continue to work in a highly collaborative way with all Deans and VCs, functional owners, and staff currently conducting the relevant activities in Human Resources, Information Technology, Financial Services, and Research Administration services.

We have engaged various audiences in the development and review of Shared Services recommendations including the Steering Committee, Liaison Group, Infrastructure and Process Work Groups (see Appendix B for Work Group and Committee Rosters). To assist with the implementation of Shared Services, Unit Implementation Leaders will be identified for each unit and/or department.

In addition, the Shared Services approach has already included significant outreach to and collaboration efforts with key stakeholder groups including: Chancellor's Cabinet; Council of Deans; individual meetings with deans and vice chancellors and their direct reports; Chief Administrative Officers (CAOs); the Graduate Assembly; and department on-site visits with faculty and staff. The Shared Service team will continue to engage these groups and add venues for: deans and chairs; campus-wide forums; additional department specific outreach, etc.

We have worked closely with the OE Program Office as well as other OE Projects, especially CalPlanning, CalTime, and BearBuy to ensure effective integration of new systems and procedures as well as to coordinate change management efforts and mitigate impact of change efforts.

Additionally, to ensure space and technology solutions are adequately identified and implemented, we will work with the Facilities and Leasing teams (under VC Denton), the space planning team (under Erin Gore, CFO), and will engage external partners.

F. If applicable, describe how the proposed solution may enable additional projects to be considered.

A number of systems solutions will need to be considered. Functional owners will be engaged in process redesign for streamlining. As a result of Shared Services Implementation, units will have the option of conducting a parallel in-unit restructuring of positions and staff, supported by OE HR resources.

Further standardizing processes will create opportunity for additional streamlining and technology enablement. Once we enable technology solutions and bring work into Shared Services, we are likely find other ways to improve administrative services in other areas that many campus units are eager to have improved services (e.g., event management, etc.)

Effective implementation of Shared Services will require better workforce planning and development, including enhanced functional, technical, and customer service training as well as performance management. Development of such training and performance management programs and their associated metrics will lead the way for enhanced training and performance management programs to be rolled out across campus.

G. What is the impact of the proposed solution on the existing systems and processes? Does it eliminate the need for existing systems and processes?

Yes, the Shared Service Center will eliminate the need for some of the existing systems and processes. The Shared Services Implementation team has already mapped 80%+ of in-scope processes and completed a preliminary identification of where work can be supported by technology. Shared Services will map the remainder and redesign/standardize processes during the Spring and early Summer of 2012. During process redesign, we will look for further opportunities for systems redesign (e.g., IT end-user support ticketing system standardization).
Over time, this will lead to a significant reduction in and possible elimination of redundant and/or shadow systems (e.g. IT support request "ticketing" systems), stand-alone systems, and localized enhancements to systems such as Our Unit. In addition, Shared Services has become the functional owner of the Blu online tool and plans to completely redesign and re-launch a new administrative services portal (the "New Blu") to improve the design, functionality, and ease of use of this type of tool.

H. What is the impact on the proposed solution on the workload?

Profile/Impact in Hours	**Current Workload**	**1-time Workload Requirement**	**Ongoing Workload Requirement**
Students	N/A	Training on new systems and procedures during pre-implementation and post-implementation	Workload will be reduced for student employees.
Staff & Administrative Leaders	N/A	**Design Validation:** • 2-4 hours per week for senior unit admin leaders **Pre-Implementation:** • 8-12 hours per week for senior unit admin leaders • 1-2 hours per week for staff in IT, HR, RA, and Finance for	With improved automation and workflow systems as well as functional subject matter expertise, there is an anticipated workload reduction (up to 35% over time). Over time, this will allow for higher staffing ratios (i.e., fewer staff to complete the same amount

		training **Implementation:** • 8-12 hours per week for senior unit admin leaders for transitioning (other responsibilities will likely be reduced) • 5-10 hours per week for effected staff in IT, HR, RA, and Finance for technical, functional, customer service and on-the-job training	of work) and support the savings of $12M-$15M per year identified in this proposal.
Faculty	N/A	**Design Validation:** • 2-4 hours per month for Deans/Chairs **Pre-Implementation:** • 2-4 hours per month for Deans/Chairs **Implementation:** • 3-5 hours per week for Deans/Chairs • 1-2 hours per month for faculty training on new systems/procedures	The goal is to reduce the amount of faculty effort related to in-scope administrative processes. While some processes will continue to include tasks that faculty themselves will either initiate or execute, the goal includes a reduction in the amount of time these tasks would take. Wherever possible work will also be shifted from faculty to staff (e.g. the management of in-scope administrative tasks will move from deans and chairs to Shared Services staff leadership). With the implementation of Shared Services, there will be improvements in automated systems as well as service quality. This will lead to a reduction in faculty time spent on administration. For example, systems will improve the ease with which administrative tasks can be completed (e.g., by eliminating the need to look for or enter frequently used administrative information such as chart strings, or graduate student names, etc.). In addition standard processes and strong quality control will reduce faculty time associated with correcting errors in processing administration work. Wherever possible, work will be simplified and shifted to administrative resources.

IV. WORK PLAN AND PROPOSED SOLUTION DESIGN

A. Provide a statement of:

- Deliverables — results the solution must deliver to achieve the stated objectives.
- Constraints — factors that may limit the options for providing the solution (*e.g., an inflexible deadline*).

Deliverables

1. A single shared services center with local resources where necessary
2. A foundational level of administrative services
3. A robust governance model with oversight at three levels
4. Improvement and standardization in processes, tools, and systems
5. Clear workflow and communications channels for shared services work
6. A service delivery model that includes service level agreements and key metrics to evaluate and manage performance and ensure continuous improvement
7. Reduction in the number of rework errors
8. Financial savings for the campus
9. Improved regulatory compliance
10. A workforce that is equipped with functional expertise and institutional knowledge
11. A learning and development plan that ensures best results for Shared Services clients and staff
12. Clearly defined career paths for staff

Constraints

1. Availability of investment resources to establish effective Shared Services Center
2. Ability to meet an extremely aggressive timeline
3. Timely availability of technology solutions
4. Ability to secure space for implementation team (10 additional workspaces and a two team rooms)
5. Ability to secure space for Shared Services Center within workable proximity to campus
6. Ability to staff the implementation team and the Shared Services center with qualified staff
7. Ability to attract qualified staff within current salary ranges.
8. Availability of unit and functional resources to support implementation

B. Provide a work plan for the proposed solution with high-level steps to complete the solution, including timeline. (Try to limit your plan to no more than seven steps.)

	MILESTONE	TIMELINE
1.	**Project Kick-Off (Completed)** • Hiring of Implementation Team • Gap Analysis	**Jul 1, 2011 – Nov 1, 2011** • Feb 1, 2011—Nov 1, 2011 • Apr 1, 2011—Sep 1, 2011
2.	**Design Validation** • Data Collection: dept. profile, activity detail surveys, site visits • Identification of sharable work	**Jul 1, 2011 – Mar 15, 2012** • Oct 1, 2011—Mar 15, 2012 • Dec 1, 2011—Jan 31, 2012
3.	**Infrastructure Development** Includes define requirements, determine options, select/negotiate • Space Plan • Develop Funding/Savings Models and Frameworks • Technology Infrastructure & Client Contact Design Requirements and Phase I Development • Technology Infrastructure & Client Contact Design Requirements and Phase II Development	**Nov 1, 2011 – Jul 31, 2012** • Nov 1, 2011—Mar 31, 2012 • Dec 1, 2011—Mar 31, 2012 • Dec 1, 2011—May 31, 2012 • Sept 1, 2012 – Mar 31, 2013

4.	**Organization and Organizational Effectiveness Development** • In-scope work Identification • Organization Structure & Governance Model Development • Organization Structure & Governance Model Delivery • Training Curriculum Development • Performance Management Process Development • Service Level Agreements Template Development • Key Metrics & Service Trend Reporting Development	**Nov 1, 2011 – July 1, 2012** • Nov 1, 2011—Jan 31, 2012 • Nov 1, 2011—Jan 31, 2012 • Feb 1, 2012—Mar 15, 2012 • Dec 12, 2011 – Apr 30, 2012 • Jan 1, 2012—June 1, 2012 • Feb 1, 2012—April 30, 2012 • Mar 15, 2012—July 1, 2012
5.	**Process Improvement** • Business Process Mapping • Business Process Redesign • Continuous Improvement • Lean Six Sigma Process Improvement Methodology Adoption / Implementation	• Dec 1, 2011—Apr 1, 2012 • Feb 1, 2012—Jun 15, 2012 • Jun 16, 2012 – on-going • Oct 1, 2011 – June 30, 2012
6.	**Project Pre-Implementation** • Workforce Transition Planning • Workforce Hiring (if post and hire) – Phase 1 • Funding Model Implementation • Technology Infrastructure/Client Contact Design Implementation Phase I • Space Design and Build-Out • Unit Pre-implementation Tool Kit Development • Technology Infrastructure/Client Contact Design Implementation Phase II	**Jan 1, 2012 – Dec 31, 2012** • Jan 1, 2012—Apr 30, 2012 • May 1, 2012—Dec 31, 2012 • Apr 1, 2012—June 30, 2012 • June 1, 2012—Aug 31, 2012 • Apr 1, 2012—Aug 15, 2012 • Mar 15, 2012—June 15, 2012 • • Sept 1, 2012 – Dec 31, 2013
7.	**Project Implementation** • Space Move-In – Phase 1 • Space Build-Out and Move-In – Phase 2 • Workforce Hiring (if post and hire) – Phase 2	**June 15, 2012 – Ongoing** • Aug 15, 2012—Sep 15, 2012 • Mar 31, 2013—Sep 1, 2013 • Sep 1, 2012—Dec 15, 2012

8.	**<u>Unit Implementation</u>** **Cohorts 1-6** • Unit Cohort 1 (Early Adopter) Implementation • Unit Cohort 2 Implementation • Unit Cohort 3 Implementation • Unit Cohort 4 Implementation • Unit Cohort 5 Implementation • Unit Cohort 6 Implementation • Continuous Improvement	**<u>Unit Pre-Implementation</u>** **April 1, 2012—Mar 30, 2014** • Apr 1, 2012—Aug 31, 2012 • Jan 1, 2013—Mar 30, 2013 • Apr 1, 2013—Jun 30, 2013 • July 1, 2013—Sep 30, 2013 • Oct 1, 2013—Dec 30, 2013 • Jan 1, 2014—Mar 30, 2014	**<u>Unit Implementation</u>** • Sep 1, 2012 – Sep 30, 2014 • Sep 1, 2012—Mar 30, 2013 • Apr 1, 2013—Aug 31, 2013 • Jul 1, 2013—Nov 30, 2013 • Oct 1, 2013—Feb 28, 2014 • Jan 1, 2014—Apr 30, 2014 • Apr 1, 2014—Sep 30, 2014 • June 15, 2012 – Ongoing

C. What are the data requirements for the proposed solution?

To implement a Shared Services Center, we will need the following data:

- financial information: current and future state costs (department profile)
- service information: current service satisfaction and productivity; staffing ratios (customer service satisfaction survey, department profile, and activity detail survey)
- technology information: existing technology; technology requirements for future stat
- human resources information: current salaries, market salaries, benefits costs for staff
- skills assessments for staff
- space data: Rentable square foot per person guidelines; requirements for common spaces and amenities
- unit profile Information (Department Profiles)
- process information: (Process maps)

D. What are the technical requirements for the proposed solution?

- Infrastructure Technologies:
  - Call Center Ticketing System – Shared Services Center infrastructure plus support/operations labor
  - Automatic Call Distribution (ACD) system for receiving and routing calls
  - Workflow software (IT, HR, Finance, RA) for routing and tracking work requests
  - User-friendly portal for accessing all administrative services
- End User Device Support Technologies:
  - Knowledgebase / FAQ
  - Remote Support for end-user device service delivery
  - Standard hardware configuration and Image management for end-user devices
  - Enterprise Mobility Strategy and mobile device management for end-user devices
  - User backups
  - Virtual Device Management
  - Patch management
  - Asset management
- Productivity Tools and Device Configuration for Staff and Client Units
  - Productivity Suite, file storage, and on-line collaboration tools

E. What are the greatest risks for the proposed solution and the plan to reduce or eliminate the risks.

	TOPIC	RISK	IMPACT	MITIGATION
1.	Financial	Financial benefits of implementing Shared Services may be smaller than first identified; incorrect baseline due to inadequate baseline data	Reduced savings	Gather Activity Detail Survey and compare to census and other models to develop actual baseline; modify target savings accordingly.
2.	Financial	Unable to fully extract shareable work or hit staffing ratios (due to fractional work, "hidden", resources, resistance, etc.)	Reduced savings	Process mapping, redesign, testing incorrect assumptions regarding shareable work and productivity increases
3.	Financial	Insufficient investment funding	Inability to implement fully or on time.	Close collaboration with unit leadership on staff transition due to unidentified/unanticipated needs/requirements
4.	Financial	Lower savings due to inaccurate cost estimate of bringing up "underserved" populations	Reduced savings	Use Department Profiles and current staffing ratios to ascertain current service levels; consider subsidizing such departments for an interim period.
5.	Financial	Lower savings as Shared Services creates new demand for services or demand for services previously supported by "free" resources (e.g., GSRs or family, outside vendors, etc.)	Reduced savings	Ensure metrics to monitor demand; flexible volume pricing/funding model
6.	Financial	Current salary averages are too low and qualified staff cost more to attract.	Reduced savings	Benchmark to market for in-scope roles
7.	Financial	Don't realize campus-wide savings because people in eliminated positions are redeployed within the departments	Reduced savings	Collect staffing data in multiple ways (ADS, Department Profile, Site Visits, HR records, etc.); monitor staffing changes in Shared Services and units to ensure implementation of planned changes
8.	Financial	Technology tools not ready to enable processes in early stages of implementation	Less efficient processes, lower savings in early stages of implementation	Standardize process/tools to increase efficiency; leverage existing tools in interim as needed
9.	Financial	The pricing model is based on assumptions about current costs, in-scope work, projected efficiencies, and growth in demand over time. Should these assumptions be incorrect, the price charged to clients units of Shared Service may be insufficient to cover Shared Services costs.	Potential deficit in the Shared Services organization.	Hire external experts to develop pricing model; validate model assumptions with CFO's office; budget a centrally funded contingency fund for the first two years of operations.
10.	Financial	The price for the standard service levels may exceed the current cost of services for some currently underserved departments.	Inability of a client unit to pay for standard services received from Shared Services	Develop options in funding model proposal that allow for central funding of some portion of Shared Services (e.g. infrastructure and other overhead)
11.	HR	Existing staff have skill gaps that make transition to Shared Services more difficult	Delay in implementation due to staffing challenges	Skills assessment, training and plan for turnover in areas where skill gaps exist

12.	HR	Too many retirements due to uncertainty or no desire to work in Shared Service Center. Also Wrong people leave/talent exodus	Delay in implementation due to staffing challenges	Create workforce transition plan as soon as possible to reduce uncertainty also create “attractive” jobs and career paths
13.	HR	Ability to attract qualified Shared Service Center staff on/off campus	Delay in implementation due to staffing challenges	Create OE HR/recruiting strategy for key roles
14.	HR	Loss of institutional knowledge due to turnover	Longer learning curve for new staff could impact service delivery	Create workforce transition plan as soon as possible to reduce uncertainty
15.	HR	Staffing of project resources takes longer than anticipated	Delay in implementation	Create OE HR team/recruiting strategy for key roles
16.	Service	Unable to deliver services outlined in Service Level Agreement (SLA)	Client dissatisfaction	Establish clear roles and responsibilities; identify correct tracking metrics; track & monitor performance of assigned tasks & estimated versus actual hours effort to identify gaps. Reassess scope and resources w/in budget to address
17.	Service	Unable to anticipate new business needs	May lead to additional costs later related to process re-engineering, changes in hardware/software, etc.	Identify business needs of today and future vision for Shared Services. Develop a formal prioritization methodology & use project governance to manage scope
18.	Service	Difficulty transitioning to new service culture (old habits/behavior/ viewpoint)	Reduced client satisfaction	Training service competencies, performance management
19.	Service	Expectation for service is higher than agreed upon in SLA	Dissatisfaction	Clear communication
20.	Service	May not achieve agreement on Service Level Agreements	May be unable to deliver on Shared Services result expectations	Best practice SLAs will be developed & implemented until agreement on SLAs can be reached
21.	Process Improvement	Required level of business process engineering and re-engineering may be underestimated	May lead to additional problems, costs and delays	Plan process redesign workshops and allow for additional workshops if necessary
22.	Process Improvement	Significant variation in current processes & perceived needs	Difficulty getting to single standard process	Actively engage campus stakeholders in collaborative redesign process and Lean Six Sigma training
23.	Process Improvement	Tech tools not ready to enable processes in early stages of implementation	Less efficient processes, lower savings	Standardize process/tools to increase efficiency; leverage existing tools in interim as needed
24.	Process Improvement	Difficulty resourcing process improvement/redesign teams	Delay/omissions in redesign	Communication/engagement with stakeholders to encourage participation and validate process with early adopters
25.	Process Improvement	Processes are more complex than anticipated (more layers to peel back)	Delay in redesign	Engage stakeholders; bring in additional external resources to support process redesign as needed
26	Process Redesign	Existing policies and compliance requirements may hamper process redesign efforts and stymie efforts to improve efficiency.	Inability to meet efficiency and savings targets.	Engage with campus Enterprise Risk Management and Audit & Advisory services early on and keep them engaged throughout the redesign process.
27.	Space Planning	Lease negotiation or build-out may take longer or not be successful for off-campus location	Delay in co-location of staff into center	Regular meetings with real estate team and status updates, etc.
28.	Space Planning	May overcommit to space (take too many RSF) due to incorrect projections of center staffing vs. embedded impact of UC path center campus staff	Too much space and associated cost	Continue to work to clarify staff locations & identify other units to share space
29.	Technology Infrastructure	Agreement on common set of systems and tools may be difficult/impossible to reach	Many result in increased complexity, decreased efficiency and decreased savings	Frequent meetings, reports, communication & issue resolution w/business owners, particularly IST, will increase understanding of requirements & identify gaps. Frequent updates to requirements & assessments will increase agreement on system and tools
30.	Technology Infrastructure	Implementation of technology tools & infrastructure (eg ACD, portal, workflow, ticketing, etc) may take longer and/or cost more than anticipated due to inadequate time/resources to develop detailed technical implementation plan and budget prior to submission of OE	Delay in tech implementation – not meeting client expectations on tech enablement=dissatisfaction	Hire additional fulltime IT project manager & IT analyst to manage & drive IT work w/ Shared Service Center team

		resource Req (tech budget represents best estimates provided by IST)		
31.	Technology Infrastructure	Technology tools may not perform optimally due to environment of "patchwork" of systems that are "bolted on" to each other rather than an enterprise-wide system	Underperforming systems = client dissatisfaction	Close work w/IST & vendors
32.	Technology Infrastructure	Technology adoption (including virtual collaboration tools) by Shared Service Center staff & clients is slower than expected including adoption of IT standards and productivity suite tools	Lower levels of efficiency/productivity	Implementation planning, etc…
33	Human Resources	Greater skills gaps may exist than originally anticipated driving the need for increased training costs and time.	Delays in staffing Shared Services Center	Work closely with COrWE and other key stakeholders in developing skill assessment and training programs.
34	Human Resources Risk	Resistance to or difficulty with implementation of key performance management tools (e.g. competency frameworks, goal setting, standard performance management process and tools)	Difficulty managing performance and holding Shared Services staff accountable for delivering expected service levels.	Close collaboration with central campus HR in development of performance management program. Define clear deliverables and milestones and reach agreement on these deliverables and milestones with all stakeholders.
35	Design Validation	Data gathered through Design Validation data gathering process may have errors due to self-reporting or lack of understanding of common terminology (e.g. self-reported staff activity data; self-reported department service levels; etc.)	Invalid data may cause delays if re-validation or resampling is required. Invalid data may also cause financial risk (less savings) and workforce transition risk (missing clear understanding of staff roles)	Validate data gathered from staff through their department managers to ensure accuracy and make corrections where necessary.
36	Project Management	Due to significant scope and complexity of the project, risk of delays or contained failures (e.g. failures that impact only parts of the project) is increased.	Delays in implementation or inability to deliver results as promised	Adhere to strict project management protocols. Leverage consultants to set up MS Project plan. Hire project coordinator to maintain integrity of plan and produce regular reports on milestones, lags, issue logs, etc.
37	Project Management	Additional complexity is uncovered not currently reflected in the project plan and timeline.	Delays in implementation and/or revise elements of project plan. Project cost overruns.	Work closely with functional and unit subject matter experts to thorough identify requirements and issues and develop implementation tools in advance.
38	Pre-Implementa-tion	Pre-implementation tools and checklists do not adequately identify and plan for all implementation activities	Delay in implementation or contained set-backs in implementation.	Work closely with functional and unit subject matter experts to thorough identify requirements and issues and develop implementation tools in advance.
39	Implementa-tion	May implement too many areas too quickly	May result in contained or wide-spread implementation failures or delays.	Hire additional implementation resources. Develop detailed implementation timeline and vet with stakeholders. Develop Implementation Toolkits and Checklist. Test implementation methodology with Early Adopter units. Revise timeline as necessary after early adopter implementation.
40	Compliance	TBD	TBD	TBD
41	Communication	Timeline calls for rapid and complex communications	Campus Community may not have time to review and absorb information prior to implementation	Multi-prong communications plan providing online, in person, print, multi-media and ad-hoc communications to push out and encourage dialogue and engagement to internalize information
42	Change Management	Timeline calls for rapid rollout of change activities	Campus Community may feel frustrated at lack of time to "prepare" for Shared Services with specific resources	Provide additional resources to deal with accelerated change; ensure resources truly meet staff and faculty needs and are offered to campus community in ways and at times that best meet their needs
43.	Labor Unions	Labor unions may oppose the Shared Services implementation or Workforce Transition Plan	Opposition by unions may cause delays in implementation	Working closely with HR Labor Relations, develop a plan labor communication and engagement plan. Plan for notice periods and other union requirements. Create specific mitigation plans for each identified potential issue.

E. How does the proposed work plan allow for evaluation and course correction to ensure the outcomes meet the campus needs?

The Implementation Team will be working under the leadership of the VCAF and Faculty Sponsor for OS who represent the academic and non-academic constituencies on campus. During implementation, Deans and VCs will be actively engaged in providing feedback to the initiative leaders. Steering Committee, Regularly go to Council of Deans, Chancellor, Chancellor's Cabinet.

v. CHANGE MANAGEMENT

A. What is the change management plan to successfully implement the outcomes of the proposed solution?

The Shared Services implementation team recognizes that there will be resistance to the Shared Services Implementation and is developing a robust change management plan to support this transition. To date the team has been very effective in engaging key leadership stakeholders to help identify and addresses leadership concerns and thereby reduce resistance. The key components of the change management strategy are outlined below and are designed to support the campus in implementing this change and to address/reduce resistance with each specific stakeholder group. Some of the key concepts of the change management approach include: proactively seeking out input; incorporating input into design and planning; frequent communication; published milestones; making information available as soon as possible to the entire campus; supporting managers and leaders with change management training and tools; and making the Shared Services team available to the campus through forum, open houses, and other events.

- Robust Communications Strategy tailored as needed to various stakeholder groups including:
  - clear and timely communications focused to audience (with major communications reviewed by governance bodies and/or functional Subject Matter Experts (SMEs) prior to distribution);
  - communications strategies focused on leadership, faculty, staff, and students;
  - multi-vehicle (print, online, in-person) communications strategy to reach campus community and enable transparency into design and implementation process;
  - proactive communication and outreach to campus leadership;
  - general Shared Services and function-specific engagements (forums, brown-bags, toolkits, interactive elements) for staff to communicate specific changes, actions needed and opportunities.
- Shared Services Design and Implementation Engagement & Collaboration: engage key stakeholders in collaborative dialogue throughout the design and implementation phases to ensure stakeholders feel they are part of the "journey". This includes:
  - collaborative project governance model that invites participation and input from all campus stakeholders and outlines clear decision-making and accountabilities;
  - dedicated collaborative workgroups with academic, administrative, functional and Shared Service representation to address critical elements of Shared Services plan, including (but not limited to) Organizational Structure and Governance, Workforce Planning, Service Quality and Organizational Effectiveness, Client Contact Design, and End User Support;
  - providing governance and workgroup materials as starting points for discussion prior to formal feedback.
- Engage campus in gathering and validating data used for decision making: extensive data gathering in collaboration with campus staff to ensure design is based on campus needs and assessing unique requirements to enable change. This includes:
  - "as-is" process mapping;
  - Department Profiles;
  - Activity Detail Survey;
  - service quality and readiness audits;
  - unit-specific Transition Activity Guides (TAG teams) made up of CSSI team members, unit leadership and campus HR to examine current processes, staffing, budget, services, etc. to enable smooth transition to Shared Services;
  - on-going engagement with staff, faculty, and students to document qualitative feedback and test/refine communications and engagement strategies.
- Pre-implementation and implementation support training for staff which includes:

- close collaboration with the Center for Organization and Workforce Effectiveness (COrWE) to outline training needs and resources and create robust, accessible skill-building opportunities for staff;
- a training strategy and execution that represents the units' needs and contains the right mix of classroom training, on-line simulations, and other documentation to fully support the transition;
- development and implementation of pre-implementation Change Leadership and Change Management training and support resources for populations affected by the Shared Services implementation.

- Implementation process that allows for testing and confidence building:
  - Early Adopter strategy to build operational base and test/refine processes, tools and support prior to campus-wide rollout.
  - Staggered rollout to campus cohorts and of functional services.
  - Ongoing measurement and continuous improvement of implementation and transition strategies, as well as Shared Services.

B. What incentives and/or disincentives are proposed to influence behavioral changes necessary for the successful outcome of the proposed solution?

Service Team Continuity – Service Teams may maintain relationships with unit staff; where appropriate/possible, point of contact will continue pre-and-post implementation.

Early Adopter Model/Phased Rollout – Additional resources, longer transition timelines and inaugural participation on Shared Services Oversight Board, Performance Management Team and Functional Advisory Councils for Early Adopters; phased rollouts with support to facilitate change.

Proactive Client Relationship Management – Regular in-person quantitative and electronic qualitative outreach to campus and Senior Unit Administrators to assess needs, priorities and performance; service team integration with units and within functions.

Focus on Service Culture and Employee Development - Service Center culture will seek to show direct support for the University's academic, research and public service mission and provide a structured focus on service quality through specific metrics, as well as "Connections," a weekly service-issue forum. Staff will also benefit from clear career paths and performance management structure, as well as ongoing training.

Frontline Innovation – Service Teams and unit/department staff will contribute to continuous improvement through direct input to Service Center leadership.

Local Resource Reallocation —Campus-wide solution with no "opt-out" creates a need for collaboration and participation to ensure ongoing support for each unit.

C. Who has been identified as the change leaders and implementers to carry out the changes necessary for the successful outcome of the proposed solution?

Campus Shared Services Implementation Team in collaboration with the CSSI Sponsors, Work Groups, Steering Committee, and Liaison Group will lead and implement the changes.

Deans, Vice Chancellors, functional owners, senior unit administrators (e.g., CAOs, Chief of Staffs, MSOs, IT Directors) and staff in the relevant areas will also lead the transition within their units.

VI. FUNDING MODEL AND BUDGET

A. Could the proposed solution move forward with partial funding? If yes, describe the revised scope, including the associated savings impact.

No. This is a large, high-impact, high-risk project that requires appropriate staffing as well as a significant investment in tools and technology.

B. What is the plan for sustainable funding to support ongoing operations of the proposed solution?

The final funding model will be ready for review March 31, 2012. The options are: 1) billing departments (preferred option); or 2) one-time budget cut to the department (less sustainable and flexible).

C. Please download and fill out the OE Resource Request Budget Template and follow the instructions on the first worksheet in the workbook to complete the budget ant line descriptions. Include both completed sheets with the Resource Request.

Please see attached

Budget Summary:

- The projected implementation costs in the attached budget total $17.3M to $19.4M. Costs include expenses in the following categories (please also see attached "*Executive Summary Campus Shared Services Implementation Team Budget Analysis*"):
  - Core Design and Implementation Team Staffing - $5.6M (FY11 through FY15.) – the core team of approximately 12 staff to develop and manage implementation of Shared Services
  - Additional Implementation Resources - $3.8M (FY12-FY15) – additional implementation resources (1 manager, 7 analysts, external consultants to support process redesign and training delivery) to support effective unit pre-implementation and transition work for each implementation cohort (several campus units will be implemented simultaneously in units requiring additional implementation support to ensure a smooth transition)
  - Application Support Center - $0.6M – includes staffing and expenses for the customer help desk set up by Shared Services to support customer calls related to BearBuy, CalTime, CalAnswers, and CalPlanning. Expenses cover the period from December 2011 to September 2012. After September 1, 2012, the Application Support Center will transition into the Share Services operating budget.
  - IT Infrastructure - $4.4M includes estimates for telephony to support the call center, a ticketing system to support the call center, workflow software to support processing of work, technology infrastructure for the Shared Services space, and computers and software for Shared Services staff.
  - Space - $1.4M to $3.5M includes furniture and fixtures for the Shared Services space. The lower end costs reflect the use of used furniture, the higher end reflects new furniture if used is not available. The costs of the build out are amortized by the landlord into the rent and rent is paid centrally in keeping with current campus policy.

VII. ASSESSMENT PLAN

Please use the table below to detail your metrics.

Notes from the Shared Services Team:

- The implementation and performance Shared Services organization will be monitored and managed by key metrics focusing on financial, operational, service, and employee engagement.
- The report of key metrics will be regular and transparent and will include an easy to read organizational "Metrics Dashboard" and well as more detailed metrics in each service area.
- Metrics are still under development as data and data sources are significantly lacking. We are working on this.

ASSESSMENT PLAN

METRIC CATEGORY	SPECIFIC MEASURE	DATA COLLECTION METHOD	DATA COLLECTION FREQUENCY	FUNCTIONAL OWNER OF DATA COLLECTION	LARGER GOAL TO WHICH METRIC RELATES
FINANCIAL PERFORMANCE					

1. Service delivery costs	Unit costs for services delivered (e.g., costs to support IT end user annually) % Reduction in unit costs	Shared Services service delivery costs Service Cost per unit from operational and client unit data. FTE reduction analysis	Monthly	Shared Services Performance Management and Metrics Team	Create financial savings
2. Overhead costs	Cost per Shared Services staff for overhead costs (e.g., supplies, equipment, space, etc.)	Shared Services financial reports	Monthly	Shared Services Performance Management & Metrics	Create financial savings
OPERATIONAL PERFORMANCE (also see Service Quality / Customer Satisfaction below)					
1. Staffing ratios internal benchmarking	Shared Services staff ratio to population served by functional area, service team, and client unit	Shared Services HR reports	Monthly	Shared Services Performance Management	Operational efficiency
2. Process efficiency	% improvement in cycle and effort time for redesigned processes	Lean Six Sigma process mapping before and after with sampling of effort and cycle time	Quarterly	Shared Services Process Excellence	Operational efficiency
3. Process improvement	Total savings from process improvement projects	Shared Services Process Improvement Dashboard report	Monthly	Shared Services Process Excellence	Operational efficiency
4. Lean Six Sigma methodology adoption	Total savings from process improvement projected initiated by trained Lean Six Sigma Yellow, Green, and Black Belts (leading indicators: Number of trained Lean Six Sigma Yellow, Green, and Black Belts; Number of Lean Six Sigma Projects)	Shared Services Process Improvement Dashboard	Quarterly	Shared Services Process Excellence	Operational efficiency
5. Shared Services resolution effectiveness	Average time to resolve customer request (see also Service Quality)	Work request ticket tracking System	Bi-weekly	Shared Services Performance Management and Team	Operational Effectiveness High Quality Services

				Managers	
6. Shared Services rework rate	# of tickets re-opened	Work request ticket tracking System	Monthly	Shared Services Performance Management and Team Managers	Operational Effectiveness High Quality Services
7. Incident escalation	Number of tickets escalated by incident type	Ticketing System	Monthly	Shared Services Performance Management	Operational effectiveness
8. Work request/transaction type tracking (e.g. number of new hires to process)	% of work requests/transaction types in each service area	Ticketing System	Bi-weekly	Shared Services Performance Management	Operational effectiveness (note: used to manage staffing levels and track workload trends)
9. Process efficiency	% of time services are delivered within Service level agreement specifications	Ticketing/ workflow tool analysis	Monthly	Team Managers	Administrative efficiency
10. Shared Services responsiveness	Average time to respond to request	Ticketing System	Bi-weekly	Team Managers	High Quality Services
SERVICE QUALITY / CUSTOMER SATISFACTION					
1. Client Satisfaction and Satisfaction elements (e.g. service attitude, timeliness, responsiveness, etc.)	Client satisfaction score and trend	Annual benchmark survey and transaction surveys	Annually & Random sampling of transactions	Service Quality Director	High quality service Operational Effectiveness
EMPLOYEE SATISFACTION					
1. Staff Satisfaction: Career path	Employee satisfaction score	Survey and On-Going Feedback	Annual	Team Manager	Staff Retention and Engagement
2. Staff Development	Number of staff successfully promoting within (note: leading indicator- Learning & Development participation rates	Learning and Development report	Quarterly	Service Quality Director	Staff Retention and Engagement
3. Staff Satisfaction: Supervisor Relationship	Employee satisfaction score	Survey and 360 Feedback	Annual	CSSI	Staff Retention and Engagement
4. Staff Satisfaction: Compensation	Employee satisfaction score	Survey and On-Going Feedback	Annual	CSSI	Staff Retention and Engagement
5. Staff Satisfaction: Working Environment	Employee satisfaction score	Survey and On-Going Feedback	Annual	Team Manager	Staff Retention and Engagement
6. Staff Satisfaction: Rewards and Recognition	Employee satisfaction score	Survey and On-Going Feedback	Annual	Team Manager	Staff Retention and

					Engagement