



Preparing for the Transition to a Shared Services Model — Q&A With Presenters

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What is the minimum employment level for considering shared services?

The most junior positions within Penn State's HR SS team are associates. These are non-exempt positions and require a high school degree and a year of experience. We go up from there. Penn State has folks who have associate degrees, bachelors, and masters, as well as a range of work experience. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Is the new onboarding center at Auburn on campus or off? If off campus, how far away is it from central campus?

It is off-campus - approximately 2 miles from campus. We have a bus line and we have parking! -- *Leanne Fuller, Auburn University*

What classifies as HR functions that the non-HR personnel were conducting?

Department admin staff were completing I-9's - although they have received training for the electronic system, there is still an issue of the deep-down understanding of work authorization. -- *Leanne Fuller, Auburn University*

How was the membership of the leadership team determined?

Decided by the VP. -- *Ale Kennedy, Clemson University*

What was the most significant or critical resource gap?

We had a problem with compliance of I-9's, E-Verify and a consistent experience of new employees. -- *Leanne Fuller, Auburn University*

How do you address the fear unknown within the HR team?

For Clemson we communicated a lot, increased engagement events, offered change management training, conducted focus groups... -- *Ale Kennedy, Clemson University*

We have been transparent with the HR staff in what the positions will handle. Although it is an ongoing process for AU, it is about transparency and education. -- *Leanne Fuller, Auburn University*



How do you get everyone on board?

This is tough - a lot of communication, engagement and building trust. For us it was a little easier because it made great business sense. We listened a lot to our customers and employees. -- *Ale Kennedy, Clemson University*

What are the different responsibilities between the specialists and coordinator? What system do you use for I-9? Electronic or paper?

The specialists are degreed employees, while the coordinator is non-degreed and will have additional admin responsibilities in the center. AU uses Equifax for electronic I-9 and E-Verify processes. -- *Leanne Fuller, Auburn University*

Is your shared service model 'opt in' or mandatory?

We will require all new employees hired on the AU campus to be onboarded in the center except our temporary work staff. We have new employees hired throughout the state, so it will be optional for them to come to the center for their experience - we will provide resources and tools for the virtual onboarding experience. -- *Leanne Fuller, Auburn University*

Would Clemson elaborate on skills assessment and recommendations for tools?

We reviewed the Deloitte Model and Taxonomy. We also conducted a SWOT analysis. -- *Ale Kennedy, Clemson University*

How many staff do you have in your HR Forward Model?

Approximately 63. -- *Ale Kennedy, Clemson University*

How many campuses/locations does Clemson HR Service Center support?

We have several extension units and offices throughout the state. -- *Ale Kennedy, Clemson University*

What type of training did you provide to the strategic consultants?

Hired consultants with a lot of industry experience. Offered hands on training and a strategic consulting (how to think strategically) session. Our state offered a workforce optimization program. -- *Ale Kennedy, Clemson University*

Were surveys used to make sure everyone had a voice?

We used focus groups, and pilots, and also "road shows" where we presented and talked with many groups. Information from these discussions also were incorporated into processes, etc. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Clemson, can you share your organizational chart on how many staff you have, as well as what roles and responsibilities each have?

Our chart is on our webpage. We have about 63 employees. [Check out our HR services webpage](#) for some information on roles. -- *Ale Kennedy, Clemson University*



Was SWOT internal to HR staff only or did you also include stakeholders?

Both internal and external. -- *Ale Kennedy, Clemson University*

Is there ever a reason to not have a shared services model? Small company?

Shared services is an operational model. For large and complex organizations, I believe there can be a great ROI. I'm less familiar with small organizations and the effectiveness with shared services in that type of environment. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Did all transitions to a shared service model include a system change to solve for transactional activities?

You do not have to have a system change for a shared services model (we piloted the new model with no change in technology). That being said, there can be significant economies of scale with either an upgrade or new technology, but it is not a requirement. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Did you try a pilot first?

Clemson did not try a centralized pilot. -- *Ale Kennedy, Clemson University*

What was the best evidence you found to help upper administration to buy into the need for change?

You need to figure out the currency that resonates with leadership and then build the story based on that. I think, however, specific examples of how it works today vs. how it could work also resonates. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

What percentage of your staff are dedicated to shared services?

We have 22. -- *Ale Kennedy, Clemson University*

Regarding the 14 on the front line, are they union employees and what level of expertise is required? Approximately how many calls or emails are they answering per employee?

The HR Services team are not union but they are hourly workers (supervisors and manager are exempt). -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

What is part of your self-service at Penn State? How many HR employees are in all tiers of your customer engagement model?

Our knowledge base (self-service) has 526 articles currently and we are constantly expanding it. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

What were the biggest change management issues?

Communication, communication, communication. Assume every time you communicate something, that for many it will be the first time they are hearing it, especially if you have a decentralized institution. We did do a lot of communication and training but it still wasn't enough. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*



Is there a magic number of employees that it makes sense to have a shared service center?

We really relied on benchmarking data and consultants to help us figure out what was the right size. There are so many variables to consider that it would be premature to provide a number. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Did you have any faculty push back? If so, how did you handle?

Faculty did push back but we knew they would, so we invested lots of hours with senior leadership to ensure we were all messaging the same thing. The provost was one of our biggest advocates and we met with deans/faculty senate, etc. to engage them. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

In an HR business partner role that has been centralized, it feels that you are no longer embedded with the department and its organizational/business practices as strongly. That face-to-face daily contact and relationships-by-walking-around is weakened, and I find myself being invited less to non-HR meetings/initiatives where my strategic business input could be helpful... I feel more siloed and the job is less dynamic. Any tips on getting over these setbacks as a HRBP?

In Penn State's model, we have a centralized HR shared services organization with a decentralized HR business partner model. To be clear, the headcount for the HRBP sits within HR, but the individuals themselves sit out in the units to ensure there is the day-to-day touch. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

How do your HR shared services interact with research administration?

There is not necessarily a specific tie with research per se. If there is an employee related item with an individual in research then, we engage, but there is no other formal affiliation with research admin. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Does your shared services model include non-HR transactions (payables, supply chain management, etc.)?

Penn State's shared services model is only HR related at this time. There are some schools such as University of Michigan whose shared services center supports both HR and finance. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

In this model, do the shared services staff have specific divisions or does each staff member service the entire university? Additionally, is there a delineation between staff and faculty?

In Penn State's model, the tier 1 support supports the entire university, all employee types. At the tier 2 level, we do have folks who specialize in certain employee types and/or units but that is not public knowledge as we reserve the right to flex where we have the greatest need. The specialization is there, however, for complexities in process or policy where sometimes we need a subject matter expert. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*



Does anyone have any experience with implementing a shared service, or support center model with the technology or capability for the members to be able to work remotely?

Penn State technology is configured in such a way as employees can work remotely. We prefer that folks are in the office but the phone system, the case management system, and the HCM can all be accessed remotely. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Did your HR leadership structure change?

Senior level leadership positions (VP, AVP, Sr. Directors) did not change. There were, however, changes below that. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

Is there something you would do differently in your implementation that you would be willing to share?

We would have spent more time documenting and training on the processes that happen outside of any of our new technologies. We didn't invest enough time in "end of end" training - helping folks to see the big picture. We told them what we thought they needed to know for their job/position/role, but in reality, they wanted to see it from all vantage points. -- *Lauri Catalano and Clint Eury, Pennsylvania State University*

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