

Position Description Questionnaire
Administration Non-Faculty Status



OHIO
UNIVERSITY

Job Title: Director of Shared Services		Pay Grade: TBD
Incumbent: VACANT – new position		Position Number: TBD
Location: 9 Factory Street	Dept: Shared Services	Plan Unit: Finance & Administration
Supervisor's Name: Bill Decatur		Supervisor Title: VP for Finance & Administration

SUPERVISOR SIGNATURE _____ **DATE** _____

OTHER SIGNATURE (S) (as appropriate) _____ **DATE** _____

PLANNING UNIT HEAD SIGNATURE _____ **DATE** _____

In completing this questionnaire, remember we are seeking information about your **position**. This is not a performance review or a listing of your qualifications. Please **complete** items 1-10 on this form. Use an outline format. Be as brief as possible. List important and typical elements of your position. Do not attempt to give every detail or exceptional situations. If you have more than one area of responsibility, you may wish to complete additional forms. You and your supervisor should discuss any differences and agree upon the elements of this position. Remember to **acquire all signatures** before submitting this document to University Human Resources.

USE THE BACK OF THESE FORMS WHEN ADDITIONAL SPACE IS REQUIRED

Describe the purpose of this position (i.e., why does it exist?)

This position will work closely with the Executive Oversight Committee to provide the vision and direction with a defined plan for the shared services organization at OHIO University.

Primary responsibilities of this position are to develop and implement a shared services model for OHIO University with a customer-centric focus initially delivering finance, budget, and human resource services beginning in July, 2008 and fully operational by July, 2009. Operations will initially focus on transactions in two areas (finance and human resources) but also provide knowledge based services (such as management reporting and budget development/forecasting) related to the functional areas of focus. The scope of services will likely expand over time. This position will be responsible for all aspects of the project with oversight from an Executive Committee.

I. Position Summary

List the important duties and responsibilities of this position in order of importance. Use an outline format and begin each statement with an action verb (direct, write, analyze). Give some indication of the frequency you perform each task (i.e., daily, weekly).

Develop the strategy, business model, and implementation plan for shared services that balances cost efficiencies and economies of scale with high levels of customer satisfaction. Plan should cover all aspects of the project including but not limited to stakeholder needs, process design based on best practices, benchmarking and identification of key performance indicators, development of service level agreements, infrastructure (space, equipment, technology), staffing and communications. Focus of shared services is on the customer,

strong internal controls, efficient operations, leveraging our human and technological resources through the use of business process redesign and continuous improvement methodologies.

Work closely with Executive Oversight Committee in identifying and communicating potential risks/issues with key decision points during the project, providing reports as requested.

Ensure high quality service at first quartile costs. Benchmark performance with other comparable operations both in the public and private sector.

Mentor project team staff for improved performance, to maintain high morale, and for succession planning - creating professional development growth opportunities.

Recruitment and development of shared services staff.

Create a climate that proactively embraces changes and emphasizes need for continuous skill building and resource development.

Demonstrate the value of the shared services approach to business units that have not yet joined the shared service organization.

II. Education and Training

What is the minimum level of education (formal schooling or special training, certification, license) necessary to prepare a person to perform this job. Give a brief justification as to why this level of education or training is required.

Bachelor's degree with concentration in accounting, finance or business administration.
CPA or MBA preferred

III. Experience

What is the minimum related experience necessary to perform this job at an acceptable level. Give a brief justification as to why this amount of experience is required. Experience should be defined by what is necessary within the profession and what is necessary specific to the position (e.g. 3 years in profession, 1 year as supervisor, etc.)

At least 5 years in a shared services environment serving in a leadership role, specifically experience in start up.
Demonstrated change management skills.
Demonstrated accomplishments in developing and implementing process improvements and measuring the success of desired outcomes.

IV. Skill

List any skills that are required in the performance of your job. Include special dexterity, counseling, human relations.

Working knowledge of Finance, Accounting & Budgeting:

- Fixed Assets and Capital Accounting
- Financial Analysis & Management Reporting
- Procurement to Pay
- Budget methodologies, development, forecasting and oversight

- Pre & Post Award business processes of Grants and Contracts
- Travel and Expense
- General accounting (i.e. journal entry processing)
- Enterprise Resource Planning Systems (i.e. Oracle, PeopleSoft)

Working Knowledge of :

- Payroll
- Human Resources
- Shared Service Support (call centers, online tools, etc.)

Ability to think strategically with a global organizational perspective

Strong operations/general management background

Significant understanding of accounting, financial and work flow processes with the ability to identify control weaknesses and implement process improvements (best practices)

Demonstrated ability to forge strong and trusting relationships across organizational lines.

Ability to communicate effectively both orally and in writing.

Superior interpersonal and leadership skills with ability to drive organizational change, impact team morale, create and sense of belonging and participation and motivate others to achieve performance excellence.

Strong people and team management experience.

Strong project management and organizational skills.

Strong ethics and integrity.

V. **Decision Making**

A. List the types and complexity of decisions this position requires a person to make.

Implementation of this new service delivery model is a high risk enterprise with potential for significant increases in quality of service and decrease in cost to the university community. The project is a complex change management venture and decisions that balance the organization's ability to effectively make change with the theoretical best course of action are typical.

Decisions regarding job design and work flow are typical.

Business process re-engineering decisions are typical.

Working with customers in cases where resources are limited and demand exceeds supply are typical.

B. Discuss existing guidelines and any precedent which govern these decisions. Include to what extent your decisions are reviewed by a higher authority before implementation.

This person will recommend policy changes to enhance efficiency while improving controls and this is generally unprecedented.

Industry best practices provide guidance.

The executive oversight team and the executive officers of the university may review decisions prior to implementation.

C. What is the impact of these decisions? Specify the areas of the University which would be affected.

Wrong decisions can have significant costs and place the university out of compliance with policy and law.

Staff reductions can take place.

Service to units suffers and this has a ripple affect as their costs go up and efficiencies go down.

D. To what extent is analytical or creative ability required to solve problems in your position. Give a typical example.

Challenges on how to improve services and lower costs are ever-present. This person can not follow what has been done in the past and expect new results, so fresh and creative thinking is integral to this position.

VI. Supervisory Responsibility

A. If you regularly supervise others, list the names and title of all employees who report directly to you, including full-time, part-time and students.

It is expected that three FTE will be supervised directly

B. Without duplicating, list the number of employees that report to you indirectly.

Twenty by 2008 and this number will double by 2010.

C. Describe any responsibility you have for supervising non-university workers (e.g. construction crews, consultants, etc.)

Consultants will be used intensively during start up and frequently ongoing.

D. List those activities that are part of your supervisory duties (i.e., schedule work, direct, budget).

Schedule

Direct

Train

Inspire

Budget

Resolve complaints/grievances

Reward

Discipline

Mentor

VII. Staff Responsibility

A. Indicate the advisory capacity of your position where others must rely upon data you submit, recommendations you make or services you provide.

Senior leadership relies on the information and analysis provided by the area supervised by this position.

- B. Discuss the impact on the University when your recommendations are followed or services utilized, and when they are not.

The shared service center offers the most efficient means of providing data and analysis to senior leadership. When advice is followed, the organization is working as the designed structure intends.

Performance suffers when decisions are not data-driven. This could be related to enrollment, budget management, or compliance, and therefore have serious consequences to the university..

- C. If you counsel and advise others, give the nature and frequency.

Feedback on performance is regularly provided to unit heads. Advice on how units might lower costs and improve service is offered regularly. Part of the benefit of shared services is the continuous pursuit of improved processes.

VIII. Funds, Property and Other Resources

- A. Describe, if applicable, the responsibility of this position for decisions that directly affect the financial success of the University through the conservation, protection and effective use of the University's current and potential assets such as operating budget, revenue, expenditures or other financial resources.

As mentioned above, senior leadership relies on shared services to provide accurate, relevant data and analysis relating to budget, human resources and other topics.

- B. What is the total value of that responsibility, in dollars?

The shared services center will ultimately assist in managing all of the universities resources, in the initial phase, the units covered are Finance and Administration, Arts and Sciences, President's Office, Executive Vice President and Provost's Office, Marketing and Communications, Advancement and Student Affairs. These budgets total over \$300M.

IX. Contact With Others

- A. Explain the degree to which this position involves the responsibility for personally dealing with individuals outside the direct line of authority; identify faculty, other administrators, civil service or students.

All of the units listed above have interaction with this position as consumers of services.

- B. Describe the nature of these contacts as it involves tact, diplomacy, controversy, cooperation, persuasion.

Many of the functions, e.g. financial and human resource, require tact as they are confidential or in draft form and under development. The underlying principle of customer service that is critical to the success of shared services requires courteous treatment, pragmatic approach to problems, cooperation and the ability to persuade.

- C. Indicate by title people most frequently contacted.

Senior leadership and all staff in the areas mentioned in VIII.

- D. If these contact are primarily outside the University community, state the nature, frequency and impact upon the University. In all cases, state the method of contact (i.e., personal, written, telephone).

At this point there is limited contact outside the university, however, as the program stabilizes and begins to grow beyond OHIO University, relationships with other governmental agencies will be the norm.

X. Comments

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