

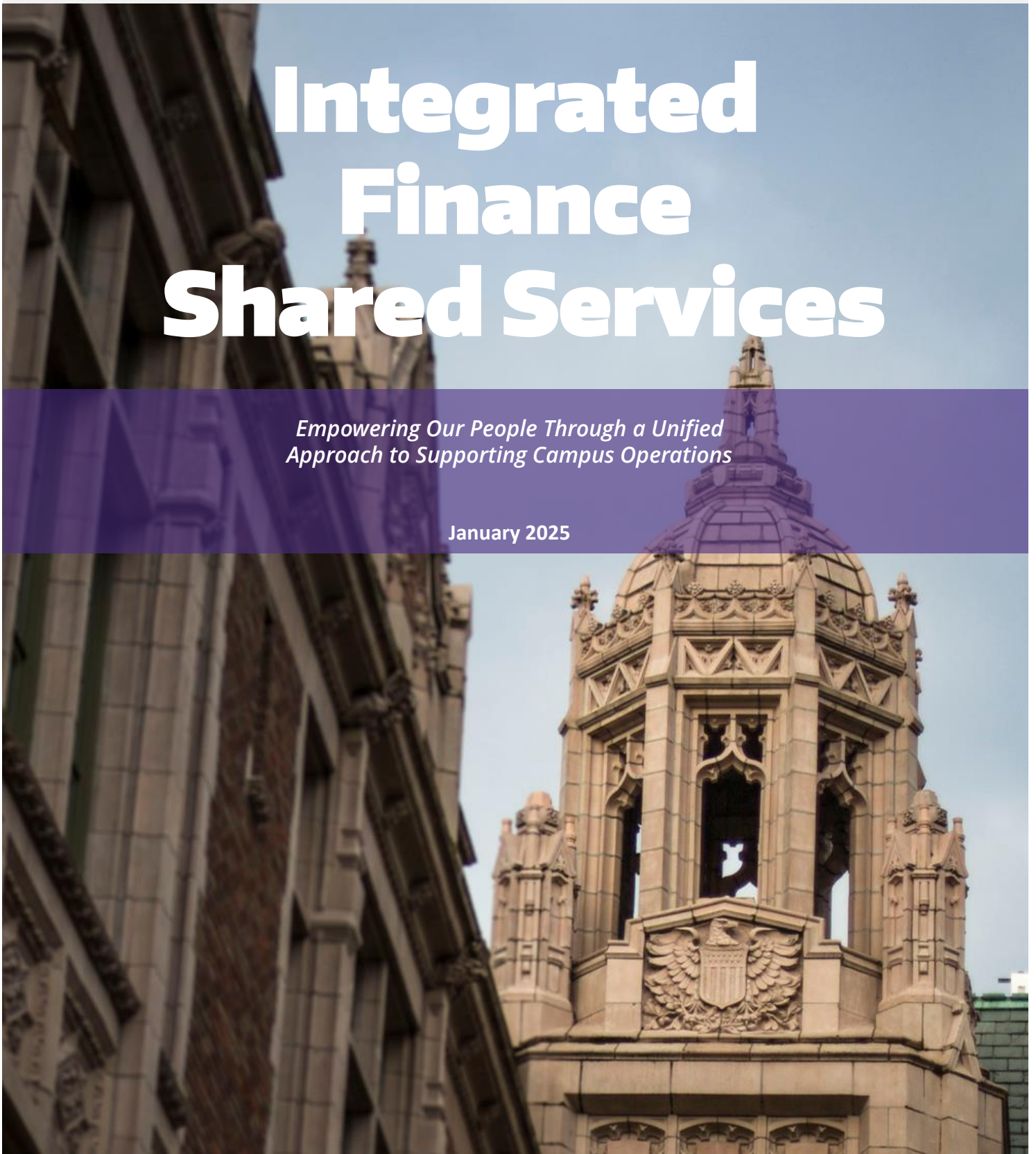
UW Finance, Planning, and Budgeting  
UNIVERSITY *of* WASHINGTON



# Integrated Finance Shared Services

*Empowering Our People Through a Unified  
Approach to Supporting Campus Operations*

January 2025



# Consolidated Shared Services

The University of Washington is committed to enhancing both operational excellence and employee experience through the thoughtful consolidation of our financial and administrative shared environments. Our goal is to create an environment where our staff can thrive, develop their careers, and contribute meaningfully to the institution's mission, while creating streamlined processes, gaining efficiencies in processing, and improving the end user experiences for transactional activities.

## Assessing Current State: Opportunities for Improvement

The University of Washington currently operates 35 distinct Shared Environment groups, each providing vital support for financial and administrative processes to units. However, the complexity of managing financial and administrative tasks in the new Workday system has overwhelmed many units due to the volume and level of detail required for transactional work. Workday is designed to be utilized daily, and our current decentralized structure makes it challenging for staff to develop the deep expertise needed to fully leverage the system's capabilities. Key challenges include:

- **Lack of Specialization:** SE staff often serve in multiple roles within their units, leading to inefficiencies and a lack of deep expertise in any one area.
- **Workload Management:** Some units struggle to keep up with transactional requirements, causing delays and added stress for staff.
- **Inconsistent Processes:** Different approaches across SEs create confusion and additional work for central services to resolve discrepancies.

By consolidating our Shared Environments, we can build specialized teams that transact efficiently in Workday, ensuring consistency and accuracy across the institution. Staff will have the opportunity to specialize and become subject matter experts (SMEs) in Workday processes, which will not only enhance their professional development but also allow unit staff to focus on mission-critical, unit-specific activities.

## Service Continuity & Relationship Building

To ensure a smooth transition and maintain strong relationships, each school and college will have a designated liaison within the centralized shared services environment. This dedicated point of contact will provide familiarity and responsive support, fostering trust and continuity. Employees will play an active role in the transition process, ensuring their voices are heard and that changes are made with their input and feedback. A phased implementation approach will allow for necessary adjustments and ongoing support, ensuring a gradual and effective shift to the new structure. Moreover, the new model will introduce greater flexibility in work structures, enabling staff to contribute their expertise in ways that align with their skills and career aspirations. This structure will empower employees by allowing them to focus on their strengths and professional growth while ensuring that their roles align with the evolving needs of the University.

### Supporting Our People: Key Benefits

**Career Growth and Advancement Opportunities:** Consolidated shared services will provide structured career ladders, offering clear pathways for professional growth and development. Staff will have access to a broader range of learning opportunities, skill building programs, and mentorship, enhancing their career prospects without needing to leave the University.

**Transition Support:** While operational changes will occur, our focus is on retaining institutional knowledge and providing opportunities for staff to transition smoothly into new roles within the shared environment. Change management plans will be created collaboratively with units to ensure their expertise is leveraged and their needs are addressed.

**Work-life Balance and Manageability:** Shared services will promote workload balance by redistributing responsibilities more effectively across teams, reducing burnout and creating more manageable roles. By leveraging technology and standardized processes, employees will experience less administrative burden and more time to focus on meaningful, strategic contributions.

## Success of the Consolidated Model

The Central Shared Environment (CSE) has already proven to be an effective model by supporting four business units as of January 2025. This structure has enhanced employee experience by enabling specialization and focused professional development. CSE employees have efficiently processed thousands of transactions annually, including over 6,200 initiated and 6,500 approved Workday transactions, as well as 9,488 ProCard verifications. These achievements highlight the scalability and effectiveness of the shared model. With a standard verification turnaround for ProCard transactions of 30-45 days, the CSE model has improved workload manageability and job satisfaction by alleviating stress related to transactional backlogs and enhancing processing efficiency. Transitioning to a consolidated structure will empower employees to focus on professional growth, benefit from consistent processes, and experience higher job satisfaction while maintaining the University's commitment to service excellence.

## Sustainable and Transparent Costing Model

The CSE employs a pro-rata pricing model that equitably allocates costs based on the time and effort dedicated to each participating unit. This allocation considers FTE contributions and the number of ProCard holders and is reviewed annually. Units participate through an annual Memorandum of Understanding (MOU), promoting transparency and alignment with operational needs. **Currently, four FTEs support four business units, demonstrating the efficiency of the model, which has successfully allocated support at 2 FTE for a large unit and 1 FTE or less per small unit.**

## Measuring Success

Value from consolidation will be measured through a combination of quantitative and qualitative outcomes that demonstrate both immediate returns and long-term benefits.

Key metrics will include productivity gains (e.g., faster processing times, reduced backlogs, and higher volume per staff member), improved compliance (e.g., fewer errors and audit findings), and cost savings (e.g., reduced transaction costs, lower staffing needs, and technology efficiencies). These metrics will be evaluated and reported on a **quarterly** basis.

Intangible value will be assessed through a **semi-annual survey** to ensure enhanced stakeholder satisfaction, increased employee engagement, and better decision-making enabled by centralized, real-time data.

Regular performance reviews, service-level agreement adherence, and stakeholder feedback will ensure a clear and comprehensive view of the consolidation's impact, emphasizing its contribution to institutional goals and strategic priorities.

### Shared Services Role & Function

**Procure to Pay:** Manage requisitions, Blanket Purchase Orders, supplier invoices, ProCard requests & increases, and verification, plus miscellaneous payment and travel reimbursements.

**Receivables:** Handle internal/external billing.

**Accounting:** Perform accounting adjustments (non-payroll and PAA) and accounting journals.

**General Support & Reporting:** Provide Workday reporting support, triage UW Connect tickets, offer general finance assistance (e.g., funding transfers, supplier requests, travel reimbursements), manage security roles, and resolve general question tickets promptly.

**Onboarding Services:** Oversee an FDM assessment and optimization, conduct Procurement Card audits, and perform security role review.

### Metrics for Success

**Cost Savings:** Measure reductions in operating expenses, including staffing, technology, and procurement efficiencies.

**Process Efficiency:** Track faster transaction processing times, reduced error rates, and increased volume per shared services FTE.

**Compliance and Risk Management:** Monitor improvements in audit findings, policy adherence, and fraud prevention.

**Stakeholder Satisfaction:** Assess improvements in service quality and user experiences from both internal and external stakeholders.

**Strategic Resource Reallocation:** Evaluate how savings and efficiencies enable longer-term reinvestment in high-priority areas such as academic programs, research, and student support.

### Questions or feedback?

Stakeholder engagement is a critical component in our shared success. Please share your thoughts with us.

**Heather Gates**, Chief of Staff, FPB  
[hegates@uw.edu](mailto:hegates@uw.edu)

**Jeremiah Johnson**, Executive Director, EBS  
[Jerejohn@uw.edu](mailto:Jerejohn@uw.edu)