DEVELOPING A SHARED-SERVICES MODEL FOR YOUR INSTITUTION

June 23 - 25, 2014
Miami, FL

http://www.accenture.com

ACADEMIC IMPRESSIONS
OVERVIEW

Institutions across the country are recognizing that traditional modes of operation are not sustainable. Depleting funding sources and scrutiny over the costs of higher education have led many to instead look at more efficient models of shared operational and administrative services. However, the realities of shared services design, implementation, and communication make it a complex undertaking at any institution.

Join us for a three-day conference that will walk you through major considerations for a shared-services initiative. Our expert faculty have successfully spearheaded shared-services transitions in a variety of institutional contexts and will help your team address critical questions, such as:

- How do we determine which shared services model is right for our campus?
- How can we assess which processes on campus are most appropriate for a transition into shared services?
- How best can we organize such wholesale change on campus?
- How best can we communicate our vision and approach to key campus stakeholders?
- How can we appropriately staff to meet current and future institutional needs?

BRING YOUR TEAM

Successful shared-services initiatives begin through shared perspectives. This event acts as a means to jump start or continue this collaborative undertaking. Professionals who will benefit the most include members of chief administrative offices, academic leadership, and project managers—particularly business and functional line personnel, especially professionals in:

- Information Technology
- Procurement
- Finance
- Human Resources

To encourage team participation, when you register two people from your institution a third can attend for half price!

Learn and develop key strategic steps in shared services initiatives from those who have successfully implemented a system on their campus.
PRE-CONFERENCE WORKSHOP

Beginning with the End in Mind--Establishing Goals for Your Shared-Services Initiative

All successful shared services endeavors share a common trait: clearly established and actionable goals. This session serves as a strategic jumpstart to your efforts by allowing you to hear about the successful goal-setting undertaken by our faculty. Use their experiences to think about your own goals and reasons for considering this complex reorganization.

IS YOUR INSTITUTION READY FOR SHARED SERVICES?

Join us for an online training that outlines this first strategic step—an assessment framework of your institution’s readiness to adopt a shared services model. Included in the session are key considerations in assessing institutional readiness for shared services. Learn more about this online training

Register for the online training and the conference and save $50! The discount will automatically be applied in your cart when you add both events.
AGENDA

MONDAY, JUNE 23, 2014

ASSESSMENT OF CURRENT CAMPUS OPERATIONS

PRE-CONFERENCE WORKSHOP: BEGINNING WITH THE END IN MIND--ESTABLISHING GOALS FOR YOUR SHARED-SERVICES INITIATIVE

8:00 - 8:30 a.m.  Continental breakfast (included in workshop registration fee) and pre-conference registration

8:30 - 11:30 a.m.  Pre-Conference Workshop: Beginning with the End in Mind--Establishing Goals for Your Shared-Services Initiative

All successful shared services endeavors share a common trait: clearly established and actionable goals. This session serves as a strategic jumpstart to your efforts by allowing you to hear about the successful goal-setting undertaken by our faculty. Use their experiences to think about your own goals and reasons for considering this complex reorganization. Presentations and workshop opportunities will be dedicated to exploring and challenging the following key preliminary considerations:

• What are your campus goals in undertaking a shared services model?
• What are the sources of these goals?
• Do these goals stem from administrative or academic roots? Are they business driven?
• In what ways do these goals align with your academic mission?
• How can I begin a roadmap that aligns these goals with realistic context and timelines?

11:30 a.m. - 12:30 p.m.  Lunch for pre-conference attendees (included in workshop registration fee)

12:30 - 1:00 p.m.  Registration

1:00 - 1:15 p.m.  Welcome and introductions

1:15 - 2:30 p.m.  Shared Services: Approaching from Multiple Contexts

There is no “one size fits all” approach to shared services. This session addresses the multiple forms this initiative can take. We will explore overarching concepts that drive the shared-services model, as well as the myriad ways they have been modified to fit specific campus cultures. In addition, this session will identify key trends that have characterized all successful shared-service initiatives.

2:30 - 2:45 p.m.  Break
AGENDA

MONDAY, JUNE 23, 2014 (CONTINUED)

2:45 - 4:15 p.m.  Ground Level Assessment: Knowing Where You Are
One of the first questions institutional leadership must ask itself is, “Which approach to shared services will work best with our institution?” The answer to that question is multifaceted, and the best approach first targets holistic campus culture considerations and then individual campus processes. This session provides a framework for both by:
• Addressing key ways to better understand campus culture
• Discussing specific measurements for identifying process efficiency
• Considering strong balance between informal and formal assessment

4:15 - 5:00 p.m.  Working Session: Institutional Assessment
This will act as your first opportunity to work collaboratively in addressing key questions to guide assessment of your campus culture, as well as processes or departments best suited for shared services.

5:00 - 6:00 p.m.  Networking reception (included in registration fee)

TUESDAY, JUNE 24, 2014

DEVELOPING A SHARED-SERVICES MODEL

8:00 - 8:30 a.m.  Continental breakfast (included in registration fee)

8:30 - 10:15 a.m.  Envisioning Governance for Your Shared-Services Initiative
While there are many forms of shared services, each successful endeavor has begun with a strong organizational foundation. This session gives you an opportunity to discuss effective organizational approaches to beginning your shared-services initiative. Key questions we will consider during this session include:
• How do you design an effective organizational strategy for a shared-services initiative?
• Which stakeholders are key in a shared-services organizational structure?
• What tasks must be assigned in the earliest stages of any shared-services initiative?

10:15 - 10:30 a.m.  Break

10:30 - 11:00 a.m.  Working Session: Considering the Structure of Your Institution’s Initiative
This is the second opportunity for you to work collaboratively with campus partners. Here, you will be able to think about how to map your institution’s organizational structure.
AGENDA

TUESDAY, JUNE 24, 2014 (CONTINUED)

11:00 a.m - 12:00 p.m. Technology Considerations in Shared Services Model
Technology can be a friend or foe in the shared-services process. If leveraged appropriately, technology can make processes more efficient and satisfy customers. However, if not integrated appropriately into process change, technology can become a cumbersome aspect of shared-services initiatives. This session addresses technology as a key feature in any process integration initiative, including:
- Exploring existing technology infrastructure and opportunities to work within it
- Discussing means to leveraging technology between potential providers and customers
- Connecting technology investments with shared services outcomes

12:00 - 12:30 p.m. Working Session: Linking Technology Considerations to Shared-Services Organization
Here, you will have the opportunity to intentionally connect previous thoughts on organizational structure to critical technology considerations.

12:30 - 1:30 p.m. Lunch (included in registration fee)

1:30 - 2:45 p.m. Stakeholder Communication: Articulating a Business Plan
As with any strategic campus plan, communication is critical throughout a shared-services initiative. Stakeholders must not only be kept up to date on a project, but also be convinced of the merit of these efforts. This requires a delicate balance of both data-driven and mission-centric arguments as to why this initiative is best for the institution. Questions to guide this session include:
- What are keys to framing the shared-services conversation?
- With whom is it key to develop a strong communicative relationship?
- What is the line between too much and too little communication in this process?

2:45 - 3:15 p.m. Break

3:15 - 4:30 p.m. Activity: Stakeholder Case Study
Here you will break out according to similar institutional size and mission and brainstorm effective strategies for tackling realistic shared services buy-in challenges. An opportunity to share and learn from other break out groups and attendees will follow.

4:30 - 5:00 p.m. Final Questions and Wrap-Up
WEDNESDAY, JUNE 25, 2014

FOUNDATIONS FOR SHARED-SERVICES IMPLEMENTATION

8:00 - 8:30 a.m.  Continental breakfast (included in registration fee)

8:30 - 10:00 a.m.  Staffing Considerations for Shared Services Initiatives
The end results of any shared services initiative are newly created or evolved positions on campus. This session will outline key considerations in staffing for these new roles, with key questions including:

• What are the keys to establishing job families in a shared-services model?
• How do I begin to develop criteria for various shared-services functions?
• What is the impact of service-level agreements on potential shared-services staffing?

10:00 - 10:15 a.m.  Break

10:15 - 11:30 a.m.  Panel Discussion: 3 Things to Do Differently
This session allows our speakers to address three key decisions regarding their shared services implementation that they would have made differently in hindsight. Included will be an opportunity for questions and answers.

11:30 a.m. - 12:00 p.m.  Working Session: Action Plan
Attendees will begin to work in their collaborative teams to develop immediate plans upon returning to campus. 30, 60, and 90 days following the conference will be their focus.

12:00 - 12:30 p.m.  Final Thoughts and Wrap-Up
INSTRUCTORS

MARA FELLOURIS / Executive Director of Program Management Office
University of California, San Francisco

Mara Fellouris has spent the last 25 years helping organizations transform their operations. Ms. Fellouris brings hands-on implementation expertise in process redesign, large-scale technology applications implementation (ERP) and organizational restructuring.

Since 2002, she has served as Executive Director of the Program Management Office at the University of California, San Francisco (UCSF). In that capacity, she guides campus-wide teams to implement improvements in technology, process and organizational alignment. A key focus area for UCSF in the last four years has been the implementation of consolidated administrative functions through shared services in PreAward, Human Resources and IT support among other areas.

Prior to joining UCSF, Ms. Fellouris spent 16 years with PriceWaterhouseCoopers leading projects for public and private sector organizations in the United States, Africa, Asia and the Caribbean to strengthen their processes, technology and organizational capacity.

RONN KOLBASH / Assistant Vice President, Yale Shared Services
Yale University

Ronn is a highly experienced professional who has successfully implemented the shared-service concept in the state of Ohio, and is now implementing it at Yale University. At Yale, Ronn is leading the establishment and expansion of a shared services center to increase the efficiency and the effectiveness of the administrative services at Yale.

While at Ohio Shared Services, he served as the project management lead for the statewide financial service center project. Ohio Shared Services provides services for multiple state agencies, including vendor maintenance, a full-service contact center, statewide launch of travel and expense for 60,000 employees, and accounts payable. He was responsible for leading center operations, organizational design, recruitment strategy, change management, employee training and communications. Under Ronn’s leadership, the state of Ohio transformed antiquated, paper-based work processes into a standardized, automated ones and created a high performance workplace with high employee satisfaction.
INSTRUCTORS

DAVID METNICK / Managing Director
Accenture

David is the managing director of Accenture Management Consulting’s Education practice. He specializes in strategic planning, talent and organization, enterprise transformation, shared services strategy and implementation, software as a service, and other improvement strategies for education and public service institutions to better achieve their missions. David and his team have extensive experience working with some of the world’s largest public and private institutions.

David has written multiple articles on improving education and the public sector, and is a speaker at various industry forums. He was recipient of Accenture’s Thought Leadership Award for supporting research in the book Workforce of One: Revolutionizing Talent Management through Customization (Harvard University Press 2010). Metnick has advised more than 20 government, education, non-profit, healthcare, and global industry clients. David is actively engaged and supports the broader education, human services, economic development, and healthcare communities that he lives in. He lives in Arlington, Virginia and is a Board Member of College Summit - National Capital Region.

MIKE PATIL / Executive Director, Carolina Counts, Chancellor’s Office
Yale University

Over the last thirty years, Mike has initiated and managed business transformation in high-tech, telecomm, consumer electronic products sectors, as well as in higher education. His expertise has been in analyzing the organizational challenges and envisioning and managing opportunities make the business operations lean and efficient. He has worked as a senior executive in Ericsson and Ericsson/GE, and has lead major initiatives in global companies such as American Express/AMS and IBM. The last seven years he has been with the University of North Carolina, three of which as the Executive Associate Dean of the School of Pharmacy and the other four in the current position that was specifically created to make UNC-CH streamlined and cost efficient. In this role, Mike has been given charge to investigate ten operational areas within UNC-CH, with an overall goal of reducing the expenses by $70 million over five years.

Given the decentralized nature of the University, Mike faced a difficult question: how to get acceptance for and participation in the improvement initiatives since there was no mandate from the top. He designed and implemented an innovative self-directed solution that has created bottom-up creation and implementation of efficiency efforts. This comparative metrics based approach has helped UNC-CH save over $61 million in just over four years through about 118 employee driven projects.
INSTRUCTORS

MARK POLATAJKO / Vice President for Business and Fiscal Affairs and University Treasurer
Wright State University

Dr. Mark M. Polatajko has over 15 years of senior fiscal management experience in both government and not for profit organizations. In his role as Vice President, he provides strategic, proactive, and innovative leadership to enhance, evaluate, develop, and implement customer-driven financial system policies, procedures, and processes for the efficient and effective delivery of services to students, customers, faculty, staff, and administration. Prior to joining Wright State, Dr. Polatajko served as the Vice President of the Administration and Finance Division of Cuyahoga Community College. He also held a variety of positions with the Ohio Lottery Commission, eventually becoming the Lottery’s Deputy Director of Finance and has five years of public accounting experience with Ciuni & Panichi, Inc.

A Certified Public Accountant, Dr. Polatajko is a member of several professional organizations, including the American Institute of Certified Public Accountants, the Ohio Society of Certified Public Accountants, and the Inter-University Council Fiscal Officers, and formerly served as Chairperson of the Ohio Association of Community Colleges Fiscal Officers.

Dr. Polatajko graduated from the University of Akron with his Bachelor of Science in Accountancy degree, earned his Master of Business Administration with a specialization in Finance from Ashland University. He received his Ph.D. in Urban Education from Cleveland State University, specializing in leadership and lifelong learning. Dr. Polatajko’s research focuses on topics in public university finance; specifically, performance funding of state public higher education.

Dr. Polatajko has successfully developed several shared services models, with an emphasis on efficiency, effectiveness and financial performance. These include group procurement of electricity, enterprise print management, and road salt storage.
INSTRUCTORS

RICHARD ST. ONGE / Associate Vice Chancellor for Shared Services
The University of Texas System

Richard staffs the UT Shared Services Executive Committee chaired by the UT System Executive Vice Chancellor for Business Affairs and comprised of the Chief Business Officers from the fifteen UT System academic and health institutions. Richard performs the following activities: identifies future UT Shared Services projects; develops comprehensive analyses that articulate the project, value, investment required, location of the operations, etc.; develops compelling business cases when project analyses are approved; and monitors key performance measures focused on ensuring effective and efficient operations in the sustainment phase. Richard also manages other UT Shared Services projects such as the UT System Supply Chain Alliance and the Self-Directed Work Teams for medical billing compliance programs and online effort reporting compliance program.

Richard received a Bachelor of Business Administration in Finance from Texas Tech University and a Masters of Accountancy from UT El Paso. Richard is a Certified Public Accountant and a Certified Internal Auditor.
HOTEL RESERVATIONS

The conference will be held at:
Hyatt Regency Coral Gables
50 Alahambra Plaza
Coral Gables FL 33134

To reserve your room, call 305-441-1234. Please indicate that you are with the Academic Impressions group to receive the room rate of $139 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 22-24, 2014. Reservations must be made by June 2, 2014. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Situated in the “Beverly Hills of Miami” just two blocks from Coral Gable’s Miracle Mile shopping, dining and entertainment area, Hyatt Regency Coral Gables is minutes from South Beach, downtown Miami, Coconut Grove, the Coral Gables business district, and is only four miles from Miami International Airport. This four-block district includes over 40 eateries, four theaters, art galleries and more than 170 shops for a shopper’s paradise. Beautiful beaches and green fairways are steps away for that perfect getaway whether visiting for business or pleasure. Our attentive staff and thoughtful amenities in our Coral Gables luxury hotel, set us apart from all the rest.
REGISTRATION FEES

Your registration fee includes: Full access to all conference sessions and materials, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, as well as refreshments and snacks throughout the conference.

---

Best Values

Conference + Pre-Conference Workshop - $1495 USD
☐ __ # of attendees

Conference

Conference only - $1195 USD
☐ __ # of attendees

Workshop

Pre-Conference workshop only - $395 USD
☐ __ # of attendees

Total________________
Total________________
Total________________

---

EARLY BIRD PRICING
Postmarked on or before June 6, 2014. For registrations postmarked after June 6, 2014, an additional $100 fee per registrant applies.

Visit our website to register online:

http://www.academicimpressions.com/conference/developing-shared-services-model-your-institution
## CONFERENCE REGISTRATION INFORMATION

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution/Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What name do you prefer on your name badge?</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State/Province</th>
<th>Zip/Postal Code</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Telephone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**IF THIS CONFERENCE PARTICIPANT HAS ANY DIETARY OR ACCESSIBILITY NEEDS, PLEASE LIST THEM IN THE SPACE BELOW. WE WILL DO OUR BEST TO ACCOMMODATE THESE NEEDS.**

__How did you hear about this event? (email from AI, ACPA, colleague forwarded email, The Chronicle, etc.)__

___

**ADDITIONAL CONTACT INFORMATION**

<table>
<thead>
<tr>
<th>Additional Contact Name</th>
<th>Contact Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Contact Email</th>
<th>Additional Contact Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EMERGENCY CONTACT INFORMATION**

<table>
<thead>
<tr>
<th>Emergency Contact Name</th>
<th>Emergency Contact Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### PAYMENT METHOD

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the “invoice me” option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

### CREDIT CARD

<table>
<thead>
<tr>
<th>Name on Card</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing Address</th>
<th>Billing City</th>
<th>Billing State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing Zip Code/Postal Code</th>
<th>Exp. Date</th>
<th>Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### CHECK/INVOICE

□ My check is included and covers ______ registration(s) Check # ____________________________

□ Please invoice me, Purchase Order # ____________________________ (PO # not required to receive invoice)

### FREE HIGHER ED NEWS AND ANALYSIS

Each conference registration includes a subscription to *Higher Ed Impact*, a free industry scan of news, trends, and research on higher education, delivered in an easy-to-scan email. *Higher Ed Impact* (HEI) includes:

- **HEI: Daily Pulse** - impactful news, trends, and practices, sent daily
- **HEI: Weekly Scan** - the week’s most critical news, with analysis of top stories and trends, sent on Fridays
- **HEI: Monthly Diagnostic** - practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

List the names of the registrants you’d like to sign up:

*Note if you do not provide any names in the above space, all attendees will be signed up for the options selected.*
ACADEMIC IMPRESSIONS CANCELLATION AND REFUND POLICIES

SATISFACTION PROMISE
We want you to be satisfied with your Academic Impressions learning experience. If the program you purchased fails to meet your expectations, please contact us within 30 days and let us know. We’ll credit the full amount you paid toward another AI program that may better fit your needs.

CONFERENCES
For in-person conferences, substitute registrants are welcome and may be named free of charge at any time. If you cancel 8 weeks or more prior to the first date of the conference, you will receive a full refund, less a $100.00 service charge per attendee.

If you cancel within 8 weeks of the first date of the conference, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not attend and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions’ liability is limited to a refund of the registration fee only.

ONLINE TRAININGS CONSISTING OF AT LEAST ONE LIVE TRAINING DATE
You will receive a full refund (less a $75 service charge) if you cancel 8 weeks or more prior to the first live training date. If you cancel within 8 weeks of the first live training date, you are not entitled to a refund. But as a courtesy, we will apply your payment (less a $75 service charge) towards a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish. You may name a substitute primary participant free of charge at any time prior to the first live training date. If available, you may switch the live training format to a self-paced format (such as a CD-ROM Recording or On-Demand Download) free of charge. (Shipping charges will apply to CD-ROM Recording orders outside the U.S. or Canada.)

ONLINE TRAININGS WHICH ARE PURELY SELF-PACED
All sales are final. No cancellations or refunds are provided.

RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS
All sales are final. No cancellations or refunds provided.