DEVELOPING A SHARED SERVICES MODEL FOR YOUR INSTITUTION

June 15 - 17, 2015
Orange County, CA
OVERVIEW

More and more Institutions across the country are looking to more efficient models of shared services for operational and administrative processes. While shared services campaigns have allowed many institutions to reinvest time and money into mission critical endeavors, the complex realities of assessment, design, and implementation make it a potentially daunting undertaking.

Join us for a three-day conference that will walk through these major considerations from the perspectives of those who have undergone a shared services transition. Through presentations and collaborative working time, your team will be able to address such critical shared services questions as:

→ Which model is right for our campus?
→ Which processes on campus are best suited for shared services?
→ How can we begin to organize the change on campus?
→ How can we communicate our strategy to key campus stakeholders?
→ How can we ensure that this model improves service on campus?

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

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

http://www.academicimpressions.com/conference/developing-shared-services-model-your-institution-june-2015
POST-CONFERENCE WORKSHOP

Training and Transitioning Shared Services Personnel
This post-conference session will spend time addressing the critical issues associated with training and preparing a shared services center to both “go live” and thrive in a new administrative environment.

LEARNING OUTCOME

After participating in this conference, you will be able to develop a framework for a shared services initiative on your campus.

CONTACT US FOR MORE INFORMATION

Contact Patrick Cain, Conference Director at patrick@academicimpressions.com or 720-988-1263 if you’d like additional information about the program.
### AGENDA

**Monday, June 15, 2015**

#### Day 1: Understanding Shared Services Approaches for Your Campus

<table>
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<tr>
<th>Time</th>
<th>Session</th>
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<tr>
<td>12:30 - 1:00 p.m.</td>
<td>Registration</td>
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<td>1:00 - 1:15 p.m.</td>
<td>Welcome and Introductions</td>
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<td>1:15 - 2:30 p.m.</td>
<td>Shared Services: Approaching from Multiple Contexts</td>
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<td>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.</td>
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<td>2:30 - 2:45 p.m.</td>
<td>Break</td>
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<td>2:45 - 4:00 p.m.</td>
<td>Ground Level Assessment: Knowing Where You Are</td>
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<td>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:</td>
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<td>• Addressing key ways to better understand campus culture</td>
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<td>• Discussing specific measurements for identifying process efficiency</td>
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<td>• Considering strong balance between informal and formal assessment</td>
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<td>4:00 - 4:30 p.m.</td>
<td>Working Session: Institutional Assessment</td>
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<td>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.</td>
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<td>4:30 - 5:00 p.m.</td>
<td>Day 1 Wrap-up and Final Questions</td>
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<tr>
<td>5:00 - 6:00 p.m.</td>
<td>Networking reception (included in registration fee)</td>
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AGENDA
TUESDAY, JUNE 16, 2015

DAY 2: DEVELOPING A SHARED-SERVICES MODEL

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

8:30 - 10:00 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?

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

10:15 - 10:45 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.

10:45 a.m. - 12:00 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?

12:00 - 1:00 p.m.  Lunch (included in registration fee)

1:00 - 2:00 p.m.  Breakout Sessions: Specifying Shared Services Challenges
This breakout session will allow you to identify like challenges amongst colleagues and drive conversation around common issues faced on your campus. Breakout topics could include:
  • Shared services focus (IT, Human Resources, Finance, Travel)
  • Unique approaches to shared services
  • Cultural hurdles to shared services

2:00 - 2:15 p.m.  Break
TUESDAY, JUNE 16, 2015 (CONTINUED)

2:15 - 3:30 p.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?

3:30 - 4:45 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.

4:45 - 5:00 p.m.    Final Questions and Wrap-Up

WEDNESDAY, JUNE 17, 2015

DAY 3: FOUNDATIONS FOR SHARED-SERVICES IMPLEMENTATION

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

8:30 - 10:00 a.m.    Focusing on Customer Service through Shared Services
A common variable on campuses with successful shared services models is improved customer services. In this session, we will discuss key steps to ensure that improved customer service remains a key component of your initiatives. Included will be discussion of:
  • Specifying transactional needs of departments
  • Clear and effective service level agreements
  • Designing and leveraging customer satisfaction surveys

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.    Final Thoughts and Wrap-Up
AGENDA

WEDNESDAY, JUNE 17, 2015 (CONTINUED)

POST-CONFERENCE WORKSHOP: TRAINING AND TRANSITIONING SHARED SERVICES PERSONNEL

12:00 - 1:00 p.m.  Lunch for Post-Con Attendees

1:00 - 4:00 p.m.  Post-Conference Workshop: Training and Transitioning Shared Services Personnel

This post-conference session will focus specifically on a key asset to any shared services initiative – human capital. From earliest transition considerations to addressing proactively addressing “going live” with your shared services center, this session will provide presentation and hands-on workshop opportunities in addressing how best to:

- Develop training modules for shared service personnel
- Identify and combat specific personnel challenges in “going live” within a shared services function
- Design means through which to evaluate personnel, processes, and job functions within shared services center
INSTRUCTORS

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.

DEBORAH NIKKEL / Assistant Director and Senior Program Manager
UCSF

Deborah Nikkel has over 25 years’ experience in helping organizations transform their business operations through organizational restructuring, business process improvement, and the introduction of new technology. Since 2010, she has served as a Senior Program Manager of the Program Management Office at the University of California, San Francisco (UCSF). A key focus area for her since joining UCSF has been the implementation of consolidated administrative functions through shared services in Human Resources.

Prior to joining UCSF, Deborah was an independent project manager/change management consultant, analyst and writer for a diverse set of clients including Aerojet, Advanced Micro Devices, UC Office of the President, Bank of America, Bank of California, Chevron, East Bay Municipal Utilities District, BayGroup International, Cayuse, Inc., Prime Computer, Inc., and Syntex Corporation.
INSTRUCTORS

MIKE PATIL / Executive Director, Carolina Counts, Chancellor’s Office
University of North Carolina Chapel Hill

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.
HOTEL RESERVATIONS

The conference will be held at:
Hyatt Regency Orange County
11999 Harbor Blvd.
Garden Grove, CA 92840

To reserve your room, call 714-750-1234. Please indicate that you are with the Academic Impressions group to receive the room rate of $169 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 14, 15 and 16, 2015. Reservations must be made by May 22, 2015. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Conveniently located in Anaheim, our hotel is a spectacular resort destination for families, business travelers, and vacationers alike. Kick back and relax in spacious rooms and suites featuring flat-screen TVs and modern decor. Savor Italian cuisine at TusCA restaurant, or enjoy a local microbrew at OC Brewhouse.

Guests enjoy perks like the Disneyland® Resort shuttle service, and easy access to the Anaheim Convention Center, Honda Center and Angel Stadium. Just a short drive away, Orange County beaches, shopping outlets and attractions offer endless vacation fun. Unwind after a day of sightseeing or theme park adventure at our two outdoor heated pools or rejuvenate in the whirlpool. Pick up a basketball game on the sports court or get reenergized in the 24-hour StayFit™ Gym.

**John Wayne/Orange County Airport (SNA)**
18601 Airport Way
Santa Ana, CA 92707
Distance: 13 miles

Super Shuttle: $11 per person/one way

**Los Angeles International Airport (LAX)**
380 World Way
Los Angeles, CA 90045
Distance: 35 miles

Super Shuttle: $17 per person/one way
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.

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**Best Values**

Conference + Post-Conference Workshop - $1495 USD  
(Corporate surcharge: $500)  
☐ ___ # of attendees

**Conference**

Conference only - $1195 USD  
(Corporate surcharge: $500)  
☐ ___ # of attendees

**Workshop**

Post-Conference workshop only - $395 USD  
☐ ___ # of attendees

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**Total**

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**ATTEND AS A TEAM** - remember, when 2 members of the same institution register, a 3rd registration is 1/2 off.

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**EARLY BIRD PRICING**

Postmarked on or before May 29, 2015. For registrations postmarked after May 29, 2015, an additional $100 fee per registrant applies.

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Visit our website to register online:

# Conference Registration Information

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**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.)

If you would like us to send a copy of your registration confirmation or receipt to someone else, please complete this section

## ADDITIONAL CONTACT INFORMATION

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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

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CHECK/INVOICE

AMOUNT TO CHARGE: ______________________

☐ 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.