

Principles of Partnership:
Working Together to Advance SUNY Shared Services Initiative

The State University of New York (SUNY) is committed to enabling student access, completion, and success through its Operational Efficiencies and Service Excellence: Shared Services – Implementation Plan. The plan details specific projects, roles and responsibilities and communications plans; the goal of which is to enhance the core academic and student service missions of our campuses by redirecting resources and reinvesting \$100MM in savings into instruction and direct student support, and to drive operational excellence and enhance student services.

In pursuit of these goals, SUNY has engaged expert consultants to review and evaluation of the Operational Efficiencies and Service Excellence: Shared Services – Implementation Plan and the consultants have recommended SUNY focus its shared services on the 14 priority activities discussed below. The identified priority areas represent opportunities to transition the provision of services to a shared delivery model.

In order to affirm our commitment to working together, and establish a framework for successful collaboration, SUNY's leadership agrees to partner in the co-design and implementation of shared services delivery models governed by the following principles.

1. SUNY is committed to:

- improving core services across campuses for students, faculty and staff;
- meeting and exceeding our students' expectations for seamless student services beyond boundary constraints;
- appropriately realigning funding to meet the goals outlined in SUNY's vision;
- engaging in honest and candid conversations about the possibilities of shared services in order to create a shared vision and set of goals;
- working together on the design, implementation and operation of the shared services environment that respects all employees; considers the impact of resources; and uses data, best practices and practical examples;
- continuously incorporating lessons learned from our experiences working together and adapt our approach along the way; and

transition the above listed Priority Areas to a shared services environment will be designed, implemented and managed using the Change Process defined below.

1) Enable Change

a) Align

- i) Establish Core Team
- ii) Establish Approach
- iii) Develop Core Set of Future Services
- iv) Develop Stakeholder Strategy
- v) Develop Critical Success Factors

b) Assess

- i) Assess Current Service Environment Vs. Future Service State
- ii) Consider Process, Technology and Performance
- iii) Identify Gaps between Current and Future
- iv) Identify Barriers to Successful Transition
- v) Define Metrics for Future Vision
- vi) Identify Benefits and Costs of Transition
- vii) Develop Business Case

2) Initiate Change

a) Plan

i) Design Future State

- (1) Create Process for active campus input into design and implementation
- (2) Increase career opportunities for functional staff and access to specialized skills
- (3) Provide a net positive financial and service benefit for each campus

ii) Identify and Define Pilot Opportunities

iii) Develop Transition Roadmap

iv) Develop Transition Work Breakdown Structure