

The Administrative
Partnership Model:
Rethinking the approach
to shared services in
higher education

A holistic model tailored to each institution

The increasingly dynamic higher education landscape continues to pressure many institutions to find better ways to work. Leaders at universities and colleges often experience ongoing demands to increase service, optimize technology, improve accuracy, reduce risk, and better organize administrative processes. Simultaneously, many administrators face continual pressure to reduce administrative spending and redirect funding toward academic missions. These competing goals—greater administrative effectiveness and increased efficiency—can create a structural tension that requires rethinking the way administrative services are provided to faculty, staff, and students both in the short and longer term. Institutions grapple with questions such as:

- How can administrative processes be simplified?
- How can we provide even greater levels of support for our faculty and students while controlling costs?
- How can we reduce the duplication in roles and responsibilities across the institution to direct more focus toward our mission?
- How can we better leverage the technology we have, or use new technology, to further support our institution?
- How can we track and analyze data for greater insights?
- How do we support better compliance without increasing administrative burden?
- How can we address our institutional needs without alienating stakeholders?

In response, some higher education institutions have moved, with varying degrees of success, to a “shared services” model in an effort to increase service levels and reduce the costs associated with processing routine administrative transactions. While there are several clear and compelling examples of implementation success across the sector, there are also examples of institutions that have struggled and even failed in their efforts. This struggle is not due to an inherent lack of value in shared services. Instead, it is often due to negative perceptions of shared services being too “corporate” for a higher education setting (which can derail an initiative before it even starts) or inadequate involvement of institutional stakeholders in the design, implementation, and fine-tuning of the new shared services model, which can exacerbate or even create new frustrations with administrative processes and services after launch. This is particularly pervasive when institutions deploy a central-focused “inside-out” approach to shared services development, failing to effectively incorporate the needs of units and departments through collaborative end-to-end process analysis and process improvement, organizational planning, metrics tracking, and feedback loops.

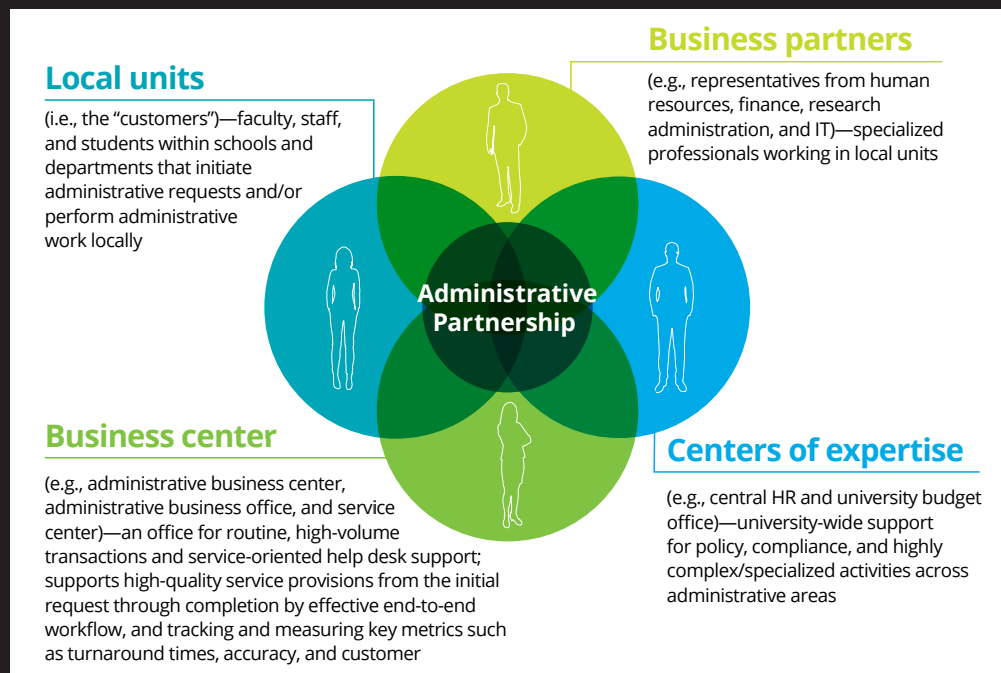
Despite the potential implementation obstacles with traditional shared services models, there continues to be a pressing need to rethink ways to provide administrative service at institutions. For many universities and colleges, current models are unsustainable due to budget shortfalls, workforce retirements and staffing shortages, regulatory compliance issues, or a combination of

all of these factors. At other institutions, leaders recognize the need to better organize processes and optimize technology to allow more direct investment in the institution’s mission, and proactively seek ways to better utilize their resources in both the shorter and longer term. In either case, a thoughtful, flexible, well-designed model for providing administrative services is critical for satisfying a wide variety of stakeholder needs while also meeting institutional goals.

With this in mind, we see a new way to incorporate the value of shared services into a more holistic model tailored to each individual institution’s needs. This structure, which we call an **Administrative Partnership Model (APM)**, uses an approach to better administrative functioning through a customized model designed by, and for, institutional stakeholders.

As opposed to a traditional approach to shared services in which development is often focused on meeting the needs of the central administration and where schools and units are sometimes tangential players in shared services development (an “inside-out” approach), the APM approach allows each institution to thoughtfully examine the work currently conducted across central administrative areas and local schools and units, incorporating the needs of both perspectives more fully. Using the APM approach, an institution can determine what is working well and should be preserved versus what needs to be improved. Then the institution can develop a customized model based on the optimal organizational structure, job roles and responsibilities, processes, policies, financial structure, and technology that support their needs. The result is often a flexible, sustainable, cost-effective APM fully tailored to the entire institution, allowing the benefits to be shared by all.

No two institutions are alike and there is not a “one-size-fits-all” template for an ideal APM. However, to maximize the value of reorganizing business processes and services, successful APM models often contain the following components:



Working closely together, the four components of an APM are highly integrated to meet the administrative business needs of an institution. This integration allows both everyday routine tasks and specialized work to be conducted in tandem by staff fully trained in their respective areas. In this arrangement, faculty, staff, and students interact with designated staff in the local units/ departments for work that requires deep knowledge of local needs and culture (e.g., coordinating school-wide events, department-specific onboarding for new hires, and greeting visitors); interact with local business partners for specialized work (e.g., handling sensitive HR topics and conducting financial planning); interact with central COEs for legal and policy matters and university-wide topics (e.g., labor relations and institutional budget reporting); and interact with an administrative business center/shared services for routine work (e.g., processing invoice payments, processing I-9s, and answering questions via a help desk).

APMs typically support some or all of the bedrock administrative functions within an institution— finance, human resources, information technology, and procurement, but they can be personalized to the functional and staff needs of an institution. For instance, communications and research administration are also becoming more common within these models, and some institutions are also exploring additional areas to include, such as marketing. Each of these areas contains multiple processes, policies, enabling technologies, business requirements, and existing challenges that must be assessed during APM development. This includes determining, process-by-process, the work within each area that should stay local, and the work that could be better conducted by another entity within the APM, such as an administrative business center/shared services. By collaboratively working with a representative group of key stakeholders from across an institution, to determine how each process should fit into the new APM, and which parts of each process should be “owned” by which entity within the APM (since each end-to-end process may require involvement from multiple entities within the APM to complete specific activities), each institution is able to customize an APM that meets its different needs.

For example, one private university called on Deloitte to implement shared services. What began as a centrally led shared services project became a more holistic and inclusive approach to APM development that involved deans and associate deans, a faculty advisory committee, and staff from local units working together to determine how work should be performed and by which entity within the APM (local unit, business partner, COE, or Shared Services). In addition to moving some work into a new Shared Services office, the institution used the opportunity to redesign some work within local units to allow staff to better focus on mission-driven activities. Based on this APM approach, the university now has a flexible, scalable administrative model designed by university stakeholders to provide high-quality service to faculty, staff, and students.

To illustrate, the example shown below describes how stakeholders at a large university worked together to develop an APM that improved the staff onboarding experience, reduced compliance issues, and simplified administrative processing.

Scenario: A new staff member begins work at a university.

Old model
• Lack of standard onboarding process leads to confusion for new hires • Large burden on local units and HR partners to guide employees throughout the process • Process involves more than 10 discrete steps and may take upwards of a week; system access is often delayed even longer • Employees enter the same data (e.g., name, SSN) multiple times • Lack of compliance with I-9 verification and document collection increases institutional risk
New model
• In the new APM, shared services and local HR business partners work together to onboard new employees; new hires have clear communications and one point of contact • Standard onboarding activities are conducted centrally, while department-specific onboarding is handled locally • Process reduced to seven steps, a 30 percent reduction, and is completed within three days • Paper-based processes are eliminated • University controls are strengthened, reducing compliance risk

Stakeholder engagement and change management

Although APMs offer tremendous flexibility, changing the way that administrative work gets done in an organization is invariably complex, especially within higher education. The reasons for this are diverse—from decentralized organizational structures to disparate technologies—and any undertaking of this type should be approached with sensitivity and high levels of engagement and collaboration with stakeholders across the institution. A customer-centric approach to APM development, coupled with robust, proactive, inclusive engagement and change management support for stakeholders across the institution, make the APM a more realistic and effective approach to enable administrative effectiveness and efficiency in a university setting when compared to historical centrally focused, top-down models.

Each individual institution has a distinct culture, with different norms, organizational structures, channels for sharing information, and past experiences with implementing new ideas on campus. There is often mistrust campus-wide for administrative projects, since in the past departments have been asked to do more with less, without fundamentally redesigning how work should get done. To address these issues, leaders should consider building trust from the outset, staying actively involved throughout the APM initiative, and demonstrating time and again the institution's commitment to the development of a sustainable model that addresses the institution's myriad needs. Staff, faculty, and, when appropriate, students, should also consider being integrally involved in every step of the project—from inception through post-implementation—to provide input, feedback, and hands-on design and testing support.

Keys to success for stakeholder engagement and change management for APM implementation:



Articulate the “why”: Clearly identify the problem(s) that needs to be solved and articulate it honestly and transparently



Align leaders: Gain alignment for the vision from both administrative and academic leadership



Focus on the “customer”: Employ a customer-centric design to serve the campus community (e.g., faculty, students, staff, and alumni)



Think “end-to-end”: Examine and redesign processes from end-to-end to achieve true value and to uncover and address unexpected impacts that may affect departments



Excel in communications: Provide consistent and frequent communications and opportunities for engagement through a wide variety of channels



Over-train: Provide robust training for all stakeholders before and after implementation

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An overview of APM development

APM development is a complex process, filled with competing visions, trade-offs, divergent opinions, lots of details, and unexpected challenges. However, the benefits can be tremendous in terms of greater alignment between the academic mission and administrative support, better service, increased accuracy, lower costs, and more transparency. For institutions that develop APMs, one of the leading outcomes of a thoughtful transition to the new model is the sense of accomplishment that arises from the university community when stakeholders work in an environment designed by themselves, for themselves.

**Like any journey, there are stages to move from inception to operation of an APM ecosystem.
To create an APM, an institution should consider:**



Plan.

Begin with the end in mind. Leadership alignment on and championing of the objectives and vision for the APM is critical to ensure the new integrated model meets the institution's needs. One vision, championed by all leaders.



Design.

Cocreate to support better design and adoption. Engage administrative and academic stakeholders to cocreate the APM. This collaboration by those served by the activities changing in the APM is essential to the model's success.



Develop.

Make time for the details. There are many "practical" aspects to building a new model. Here, processes, policies, technology, governance, and training are the critical building blocks.



Test and refine.

Measure twice, cut once. End-to-end testing of processes and technology with hands-on involvement from staff, faculty, and students is conducted, and feedback is gathered. If something is not working, it can and should be tweaked or changed during this stage. Also, depending on technology constraints, there may be opportunities to roll out new services to portions of an institution (i.e., conduct a pilot) before a larger implementation.



Implement.

The new model is "live." New processes continue to be tested, the staff continues to train, and technology implementations are monitored. Importantly, end user input is continuously solicited to provide real-time feedback.



Optimize.

Continue to evolve. Transformation takes time, and so does optimizing an APM. A continuous improvement (CI) program and performance metrics can help optimize the new APM.

In each stage it is critical to remember that journeys infrequently go completely as planned, and often come with unexpected opportunities and challenges. Accordingly, APM implementations should allow for some degree of flexibility. All parties need patience and persistence in this complex process of fulfilling diverse stakeholder needs, but in the end, an APM designed by and for an individual institution is a model that can stand the test of time.

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