



Central Support Unit (CSU) Allocation Committee Meeting

Minutes

Date:	12/16/2020
Time:	1 p.m. – 2 p.m.
Location:	Virtual Meeting
Interim Co-Chairs:	Interim Provost Michael Johnson and Associate VP for Financial Affairs Kristie Harris
Voting Members:	Mike Kilbride, Theodorea Berry, Paul Jarley, Sissi Carroll, Fernando Rivera, Chris Ingersoll, Michael Georgiopoulos, Misty Shepherd
Absent	David Pavlonnis
Huron Consultants	Kevin Lintner, Michael Lee, Michael Razis, Jaime Ontiveros, Greg Bedell
Staff (non-voting members)	Derek Horton, Rebeca Richards, Kathy Mitchell, Joe Trubacz
Minutes:	Tracy Slavik

Meeting Agenda

1. Approval of the minutes from November 12, 2020, and December 2, 2020
2. Continue service level agreement framework discussions
3. Review example SLA framework as applied to HR
4. Preview KPI identification and determination parameters
5. Preview agenda and content for meeting #4 (January 20, 2021 at 2 p.m.)
6. Meeting adjourned

Approval of minutes

The minutes from the November 12, 2020, and December 2, 2020, meetings were approved as submitted.

Continue Service Level Agreement (SLA) Framework Discussions

SLA Best Practices

Kevin Lintner continued the SLA Best Practices discussion from the December 2 committee meeting. The Roles and Responsibilities and Service Catalog areas were discussed at that meeting, but Lintner provided a recap here.

SLA Roles and Responsibilities

Lintner said role clarification and defined responsibilities ensure all parties understand where their attention is required and what dependencies exist to avoid service interruptions or delays.

Purpose:

- Defines responsibilities and requirements of each party involved in the delivery of services
- Establishes accountability structures, dependencies, and provides expectations to refer to during service disputes to prevent ability for either party to plead ignorance
- Ensures clarity on roles to avoid duplication of activities between support unit and receiving unit/customer

Framework for SLA:

- ‘Parties’ involved in delivery/provision of services include the CSU
- ‘Parties’ receiving services include schools/colleges, departments, self-supporting units, other support units, and employees

The service catalog is a core component of an SLA.

SLA: Service Catalog/Cycle Time

Lintner said service catalogs provide an overview of services offered through a given support unit, as well as expected cycle times for service delivery.

Purpose:

- Documents services provided by a central support unit which are available to be utilized by campus constituents
- Establishes guidelines for services central support units do not have in-house expertise to perform or ability to deliver
- Sets expectations for service cycle time (average time for service delivery/completion)

Framework for SLA:

- Advertises ‘publicly’ available services.
- Services are defined at the “request” level in SLAs.
E.g. “I want to hire someone”
- Activity, step, and task level detail is excluded in SLAs, but is an important consideration for continuous service improvement.
E.g. “Request background check/immunization forms”

Lintner said SLAs are not intended to delve into the service delivery component (activities/tasks). Rather, SLAs will focus on service categories and services/requests.

Interim Provost Michael Johnson asked for clarification on what specific tasks or timelines can be part of an SLA, as an agreement that contains only high-level general concepts would not be beneficial.

Misty Shepherd concurred and asked what an SLA accomplishes if it does not measure performance.

Jaime Ontiveros said SLAs do not fix problems. SLAs outline who is responsible for what and include KPIs to help determine if the SLA is effective. Resolving service issues is a separate focus and typically not under the purview of this committee. The VP organization is most often the “problem fixer”.

Discussion occurred around the service delivery concept and how it ties into the SLA development process.

Johnson said these abstract concepts will become more tangible as the committee works through examples in the coming weeks.

SLA: Funding/Cost Structure

Lintner said the new budget model creates the need for central units to document and define service level agreements with service receiving units.

Service levels are split between base-level services that are allocated to units (funded by the Budget Model Central Support Unit Allocation) and “add-on” or “buy-up” work that is paid via chargebacks. Explicitly defined SLAs will reduce confusion and encourage appropriate service level utilization.

Service recipient units must make conscious decisions regarding utilization of any “add-on” services. Elective services and chargeback rates should be clearly communicated to service recipient in SLAs. SLAs and pricing structures for “add-on” work are levers available to central units to control demand and properly balance resources to meet both base-level and “add-on” workload demand.

SLA: Evaluation, Escalation, and Enhancement Process

Lintner said defined service evaluation criteria, metrics, and clear escalation processes/contacts are critical for continuous service enhancement.

- Evaluate services against identified performance metrics that are reported and made available to ‘customers’.
- Customer satisfaction and feedback is documented to ensure that support unit services are aligned to campus needs.
- Identify clear points of contact (not generic inboxes) for issue escalation, to build confidence concerns are received.
- Established process for operationalizing opportunities for service enhancement or addition are prioritized based on customer feedback and campus need.

Application of SLA Framework

Application of SLA Best Practices: Human Resources

Lintner explained the core SLA components (roles and responsibilities, available services, cycle times, service rates or chargebacks, and service performance metrics and escalation contacts) as they relate to the Service Level Agreement for HR.

Discussion occurred around whether other components should be included, key performance metrics framework, taking into context the environment (working with limited resources, for example), whether customer intake processes exist in the units, and parsimonious KPIs.

Parameters for KPI Identification

Lintner said the committee will review the KPIs for each support unit starting in January. While many KPIs exist for support unit operations, to fundamentally change how UCF evaluates administrative performance, the initial focus will center around strategic, outcome-oriented KPIs that:

- Are outcome-based
- Reflect how CSUs aid in advancing UCF missions
- Align with primary unit/institutional goals
- Reflect expectations of both service providers and recipients

These are different from operational or transactional KPIs, which:

- Are quantitative, metric driven and volume-based
- Provide insight into internal activities of a CSU
- Reflect internal evaluation/bandwidth of central support unit

The CSUAC's determination of roughly three KPIs for an executive/dean-level audience will help balance leveragability of metrics and CSU resource constraints.

If limitations on current reporting capabilities exist, support units should develop a plan outlining the steps necessary to operationalize their ability to monitor strategy-oriented KPIs (barriers, timeline, resources required, etc.)

Preview agenda and content for meeting #4

Johnson said the next committee meeting (scheduled for January 20) will discuss:

1. Review adjustments to service level agreement framework
2. Begin a review of support unit KPIs and determine most relevant KPIs for executive-level use
 - a. Committee discussion > consensus > vote (if necessary)

The meeting adjourned at 2 p.m.