

# **Yale Business Operations**

## **SERVICE GROUP CHARTER**

### **OVERVIEW**

Building and supporting a service-oriented culture at Yale is a key focus for Business Operations. The goal is to improve overall user satisfaction with services that drive the work that is done everyday at the University. Service Groups will become the community engagement vehicle to champion new processes and define value and service levels.

Establishing Service Groups that include faculty and staff will enable a formal review of services, create an understanding of the integration and overlap of processes (how the work is done) and the services that are provided, as well as facilitate a review and assessment of the value and overall satisfaction with these services from end-to-end.

Service is defined as a means of facilitating the consumer's desired outcome through the use of one or a combination of processes, for which the consumer does not bear the burden of ownership. Value is measured by the consumer's satisfaction with the efficiency, timeliness, and quality of outcomes.

The implementation of Workday at Yale will enable the integration of many (but not all) of our human resources, payroll and financial systems. It is therefore important that the users of these services review the new workflow as a component of the end-to-end service. Each Service Group will be uniquely positioned to review, validate and influence how the Workday process design will impact the services.

### **OBJECTIVES**

- *Better administrative service:* End-to-end services that are efficient, high quality, and reduce the cost of administration
- *Greater community adoption of common business processes:* Partner with the community to reduce the number of unique processes inherent in a service
- *Improved training:* Build a broad understanding for "why" work is done, not just "how" work is done.
- *Shared ownership of outcomes:* Two-way dialogue between process owners and the community will develop and strengthen end-to-end services.

### **SCOPE OF WORK**

1. Prior to the implementation of a significant process change, the Service Group will provide a written evaluation of the proposed service. The evaluation will be sent to the Business Operations Leadership Team (BOLT), each Vice President with an oversight role for some component of the service, and the Workday Steering team as applicable. Criteria for service evaluation are as follows:
  - Is it likely to result in repeatable, high quality outcomes?

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- Does it optimally utilize common processes that will work for most?
  - Does it make it easier to get work done and harder to make mistakes?
  - Will it help to establish an accurate, trusted, and timely reporting environment?
  - Will it minimize administrative overhead for faculty and other service users?
  - Will it lower operating costs and improve effectiveness?
  - Are the number and level of approval steps commensurate with the level of risk associated with the service?
2. Conduct facilitated team reviews that evaluate and validate Workday prototype workflows from the end users' perspective and ensures that cross-functional processes are aligned, integrated and make sense for the staff in department business offices and central process owners
  3. Assist with identification of common business requirements in order to facilitate the simplification of end-to-end services
  4. Determine priorities and trade-offs in service delivery design and recommend and implement changes that will improve service delivery
  5. Propose measurements for the end-to-end service based on efficiency, accuracy, and quality
  6. Identify current policies that may complicate/interfere with the proposed delivery of services
  7. Recommend and advise on workforce skills needed, as well as training methods and content for training
  8. Partner with process owners to champion service enhancements during deployment

## **MEMBERSHIP**

With the goal of representing the broader community view, Service Groups will draw from the entire University Community and will be open to faculty and staff at all levels of the organization. Service Groups will have approximately 10 members with a designated service group leader. Both the leader and the members must have subject matter expertise for the specific service group, as well as the ability to be a team player with an institutional view and the ability to reach out and represent their peers. Training will be available to the Service Groups to develop competencies in critical, analytical and creative thinking along with business process workflow, metrics development and other team-based skills.

## **MEMBER EXPECTATIONS**

Members are expected to actively participate in team training, review materials prepared for the group, participate in software test scenarios and user acceptance testing, gather additional input and viewpoints from colleagues outside the group, and to represent those viewpoints

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## **CONSTITUENT REPRESENTATION**

Each team member will have a clear role and be responsible for representing a specific constituency. For instance, a team member from a professional school may be charged with representing the interest of all professional schools, or a department accountant could be asked to represent the views of those in similar positions.

## **SUPPORT**

Business Operations will provide each group with support to arrange meeting logistics, help facilitate meetings, take minutes, document action items, draft required materials, as well as research policies and collect data, as needed.