Dear Colleagues:

It’s hard to believe that fall semester is almost over and the holiday season is approaching!

I am happy to continue reaching out to our campuses through our Shared Services Newsletter. It is a way for me to report out all of the new and exciting things happening on our campuses; focusing on improving customer satisfaction, efficiency, cost effectiveness, and continuous improvement.

In July, I had the privilege to travel to Indianapolis, Indiana. There, I accepted, on behalf of both colleges, the National Association of College and University Business Officers (NACUBO) 2013 Innovation Award. The Innovation Award honors the achievements of higher education institutions for their “cutting-edge” or “first-of-its-kind” approach to an institutional issue within the higher education community. It was a proud moment for me and for our shared services team to be nationally recognized for all of our joint efforts. You can read more about the NACUBO Award on Page 2 of this newsletter.

Also this summer, we hosted the “Harnessing Systemness: Regional Discussions on Efficiency & Excellence” conference at SUNY Potsdam. This conference focused on sharing stories and celebrating successes in creating operational efficiencies and improving service excellence. It was an opportunity for regional campuses to learn from our neighboring institutions and foster greater regional collaboration. Over 150 people were in attendance, and this included colleagues from SUNY System Administration and ten other SUNY Colleges. You can read more information on Harnessing Systemness on Page 2 of this newsletter.

Since the formation of the Shared Services Steering Committee, we have gathered five proposals from departments across our campuses. Four of the five proposals were vetted through this group, and a recommendation has been drawn up to be presented at the next Joint Leadership Meeting. We urge other people who may have a shared services idea to write a proposal and submit it to the Shared Services Steering Committee!

Our 2013-14 Consolidated Budget Book has recently been rolled out and we encourage each of you to look at it. It will provide you with much information regarding our current budget. We will begin preparing the 2014-15 Consolidated Budget Book in early Spring, 2014.

As always, should you have any questions, please remember that my door(s) are always open to you!

Happy Holidays!

Natalie L. Higley
**AWARD-WINNING PROGRAM:**

Vice President Higley, and her shared services team were nationally-recognized by the National Association of College and University Business Officers (NACUBO) with an Innovation Award for 2013 at the NACUBO annual meeting in July 2013. The two colleges were recognized for developing a unique administrative alliance that has fostered shared services across the two campuses during a time of increasing enrollments, declining budgets, and increasing operating costs. Shared services has allowed for creative solutions in meeting the business and operational needs of the campuses while developing efficiencies, improving services and quality, and redirecting funding to the academic and student services of the two campuses.

**Harnessing Systemness: Regional Discussions on Efficiency & Excellence**

In August 2013, SUNY Potsdam and SUNY Canton were hosts to a SUNY-wide Harnessing Systemness Conference. As part of the SUNY conference, both institutions played a vital role in sharing the progress made in shared services between the institutions. The keynote address, Roots to Results: The Canton-Potsdam Story, was presented by Vice President Higley.

As part of the presentation, it was explained to the attendees that Shared Services is a business model to standardize processes and create efficiencies, which eventually translate to cost savings for the campuses. Shared Services is not a “blunt instrument” for cost reduction. Shared Services helps the campuses in:

- Reducing risk
- Ensuring greater standardization allowing for more transparency
- Freeing up institutional resources to focus on mission-critical programs
- Allows for the creation and adaptation of best practices

Breakout sessions in the afternoon included the following topics: Academics & Libraries; Finance, Procurement & MWBE; Financial Aid & Student Accounts; Human Resources & Payroll; Information Technology; and Leadership.

**Do You Have the Next Shared Services Idea?**

**If you have a non-academic idea that will create efficiencies, customer satisfaction, and will be cost effective for both campuses - share your idea with the Shared Services steering committee!**

The Shared services steering committee will gather proposals, build a business case, and draw up a recommendation to be presented at joint leadership.

Joint leadership will review the recommendations and the President’s will give final approval.
SUNY Potsdam Interim President Dennis L. Hefner and SUNY Canton Acting President Joseph C. Hoffman signed a memorandum of understanding between the two institutions, at a ceremony held on the Potsdam Campus July 1, 2013. This agreement provides a framework for collaboration between the two campuses through 2015, with a goal of providing high-quality services, while conserving valuable resources and preserving the integrity of the two institutions distinct missions and brands.

The MOU calls for Potsdam and Canton to work together on back office administrative functions, as well as services that the campuses would have difficulty offering separately.

**SHARED BUDGET DIRECTOR**

Shawn K. Miller has been appointed the Shared Director of Budget for both SUNY Canton and SUNY Potsdam. Shawn started her career at SUNY Canton in 1998, working in the Business Office. In 2004, she became the Assistant to the Vice President of Administration, and in 2006 she became the Budget Control Officer in addition to her Assistant to the Vice President role. Shawn became the Director of Budget for SUNY Canton in 2012.

Shawn will be responsible for assisting in the design and roll-out of a standardized budget process, which will allow us to share knowledge and resources. Both campus budgets will continue to remain independent. Shawn will also be administering the budget function to support and enhance the academic purpose of both campuses. Congratulations on your new position, Shawn!

**SUSTAINABILITY**

SUNY Canton and SUNY Potsdam welcomed Kelly Carter this summer as our new shared Sustainability Coordinator. Kelly comes to us from PACE University, where she was a Research Assistant, and also coordinated environmental initiatives for the National Sports Academy in Lake Placid. Kelly will assist with the development of campus energy master plans, and will also work with students to raise environmental awareness on both campuses. Welcome Kelly!
The Human Resources and Payroll Office has been busy with new initiatives and implementation of the new UUP contract. Background checks are now standard for all new employees. Our online applicant system, PeopleAdmin went live with a soft launch in October and is expected to be implemented campus wide in January. Training sessions will be scheduled, as well as one-on-one instruction. The online system will eliminate the need for confirmation and regret letters to be mailed to applicants. Additionally, Affirmative Action information will now be collected within the online system, so we expect more accurate and comprehensive reporting.

The UUP Contract implementation required various payments to be processed and Payroll has completed those transactions. If you have any questions, please call our Payroll Office for an explanation of your paycheck. Sheila Scott or Denise Burrows would be happy to help you.

Stacey Basford is now a part of the Human Resources team and is the campus Affirmative Action Officer and Title IX Coordinator. Additionally, Stacey is in charge of our compliance training. We are thrilled to have Stacey as part of the HR group.

**Compliance Training Update:**

- Excellent Completion Rates for Round One: SUNY Canton 100%, College Association 100%, Canton College Foundation 100%, and SUNY Potsdam 98% - Congrats!
  - Round Two was due on December 1 - Final Reminder was sent November 25.
  - Round One for PACES Managers began November 1 and ends on January 1.
  - Training for PACES Hourly Employees began December 2 and ends on January 31.
- SUNY Plattsburgh and their College Auxiliary Services joined our compliance program on November 6.
  - Clinton Community College is expected to join as well in the next couple of weeks.
  - Round Three will roll out on January 2 and run through March.
  - SUNY ESF may be joining us as well.
- Canton/Potsdam/CA/CCF’s Round Three Roll Out - January 2 - March 31.

**Information Technology Services:**

ITS has made great progress over the last 5 months, focusing our efforts towards increasing operational efficiency, providing expanded support services, and alignment with university wide initiatives.

We have begun to examine our existing contracts across the two campuses, aligning contractual dates, standardizing on vendors, and aligning licensing for software solutions. This will produce a significant savings, giving us critical mass to negotiate and procure on behalf of both campuses. Two recent examples include sharing of audit software at a savings of $15K and a joint purchase of a security appliance at a savings of $25K for the campuses.

To further these efforts, we also plan to consolidate our department procurement, budgeting and operations support for both campuses into a single unit. Our telecommunications staff is also working to simplify and align our billing practices across campuses, allowing for a single unit to provide billing support for both.

Our staff is also currently exploring many other potential opportunities. A select few include migration to common email and calendaring platforms, expanded wireless internet access, a unified security camera system, and common collaboration and video conferencing solutions for teaching/learning.
Environmental Health & Safety Safety Blitz!

On October 16 & 17, Environmental Health & Safety and SUNY Canton hosted a “Safety Blitz” for both campuses facilities personnel in Dana Hall.

The two 8-hour day training sessions included Trenching & Excavation, Scaffolding Safety, Confined Space Entry, and Lockout/Tagout Operations.

Each topic included case studies and open discussions on the safety measures taken on both campuses.

All four topics were focused on the basics of regulatory compliance and the hazards that we face in our daily objectives.

On the Horizon for 2014:

Several administrative areas are exploring opportunities through shared services, allowing them to work more collaboratively and efficiently. In 2014, the following areas are slated to finalize their agreements:

- Student Accounts: Collaborative program through Higher One.
- Purchasing
- Accounts Payable
- Travel and Travel Card Program

Information Services will continue to work towards standardizing processes across both campuses as the two departments move toward working more closely together.

Other areas that will be explored for potential shared services are Student Accounts, Energy Management, Capital Project/Construction Management, Revenue Accounting, and Financial Aid.