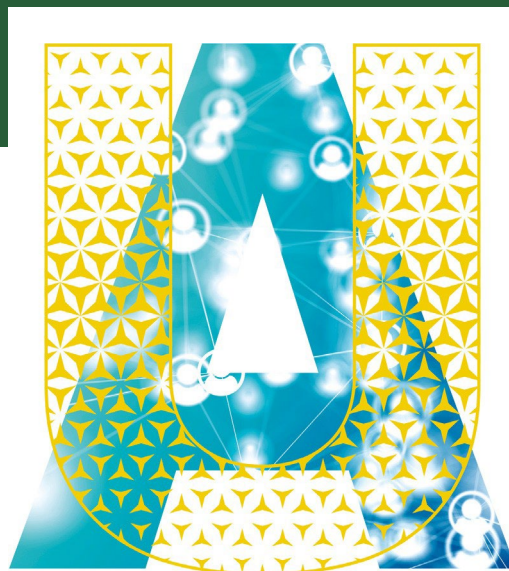




UNIVERSITY
OF ALBERTA

SHARED SERVICES

Defining Our Why



Operational Plan Summary



TERRITORIAL ACKNOWLEDGEMENT

The University of Alberta, its buildings, labs and research stations are primarily located on the territory of the Néhiyaw (Cree), Niitsitapi (Blackfoot), Métis, Nakoda (Stoney), Dene, Haudenosaunee (Iroquois) and Anishinaabe (Ojibway/Saulteaux), lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of all First Nations, Métis and Inuit nations.



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PURPOSE STATEMENT

WE **LEAD WITH PURPOSE** IN CREATING A CULTURE OF SERVICE EXCELLENCE WHEREBY SHARED SERVICES SUPPORTS THE UNIVERSITY OF ALBERTA'S STRATEGIC PLAN SHAPE BY:



Being curious and not being satisfied with the “status quo”, self-reflection and lessons learned; and

Creating well defined agile processes, documentation and training through collaboration with its clients



We will always be seeking, always be challenging, and, most of all, always be leading when it comes to providing seamless end to end integrated service delivery. We will make data driven decisions using metrics, surveys and service level expectations (SLE's).

The foundation of how our unit will work together will be governed by our team driven document, "Shared Services: A Common Approach to Working Together". It will be further denied by our unit's leadership team's commitment to fostering a healthy, safe and inclusive work environment where the "power of connection" enables all staff to be accountable and empowered to perform their work and contribute to the success of the overall team.



We will exhibit this commitment by creating a "best in class" shared services with processes and systems that create efficiencies and cost savings to support the core mission of teaching, learning, and research, community engagement, and student experience enrichment.



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Our clients and the core mission of teaching, learning, and research is at the heart of all we do. By living our values we strive to make every interaction the very best it can be.

OUR VALUES



- We have integrity and transparency
- We develop and empower our people
- We value both innovation and creativity
- We strive to be “best in class” in what we do
- We believe in partnerships and collaboration



VALUE DRIVERS

1. Maximize the footprint of Shared Services to better support the University
2. Enhance productivity and increase cost-effectiveness
3. Capitalize on knowledge and expertise both within Shared Services and the university community
4. Create an environment of accountability by working within our stratum and owning our decisions
5. Support the administrative operating model and the goal of being “one university”

ENABLERS



1. Talent: Future and current commitments to empowering staff future and developing talent, particularly when it comes to forging connections with educational institutions, building a pool of “emerging future” leaders, and defining cross-organizational career paths.
2. Accessibility, Community, Belonging (ACB): The words “Access, Community and Belonging” are more than descriptors—they are outcomes we strive to achieve. Access ensures all have the opportunities to succeed and flourish, by dismantling barriers. Community emphasizes connection and shared purpose. Belonging creates an environment where individuals feel seen, valued, and supported. Together, these outcomes guide our transformative work across policies, programs, and governance.
3. Process: Collaborating with the Centres of Expertise and identifying clients who can provide diverse perspectives on what works well (and what doesn't) across the institution based on their operational and systems expertise and foster end-to-end process accountability to ensure the success of the operating model.
4. Service Delivery & Culture: Evolving to the next level of value creation requires increased responsiveness, which in turn will require new, more innovative approaches to expanding and maximizing service delivery & culture while maintaining our service excellence principles.
5. Technology: Deployment of existing and emerging tools (like AI, RPA and maximizing existing functionality in core systems) and client adoption of technology will be key to enabling process standardization, reducing costs, and meeting escalating service delivery standards.
6. Measurement: Reducing the gap between the perception of value received versus the reality. Metrics are required across Shared Services to determine what is working, what is not working and where resources need to be allocated to determine and resolve the issue.

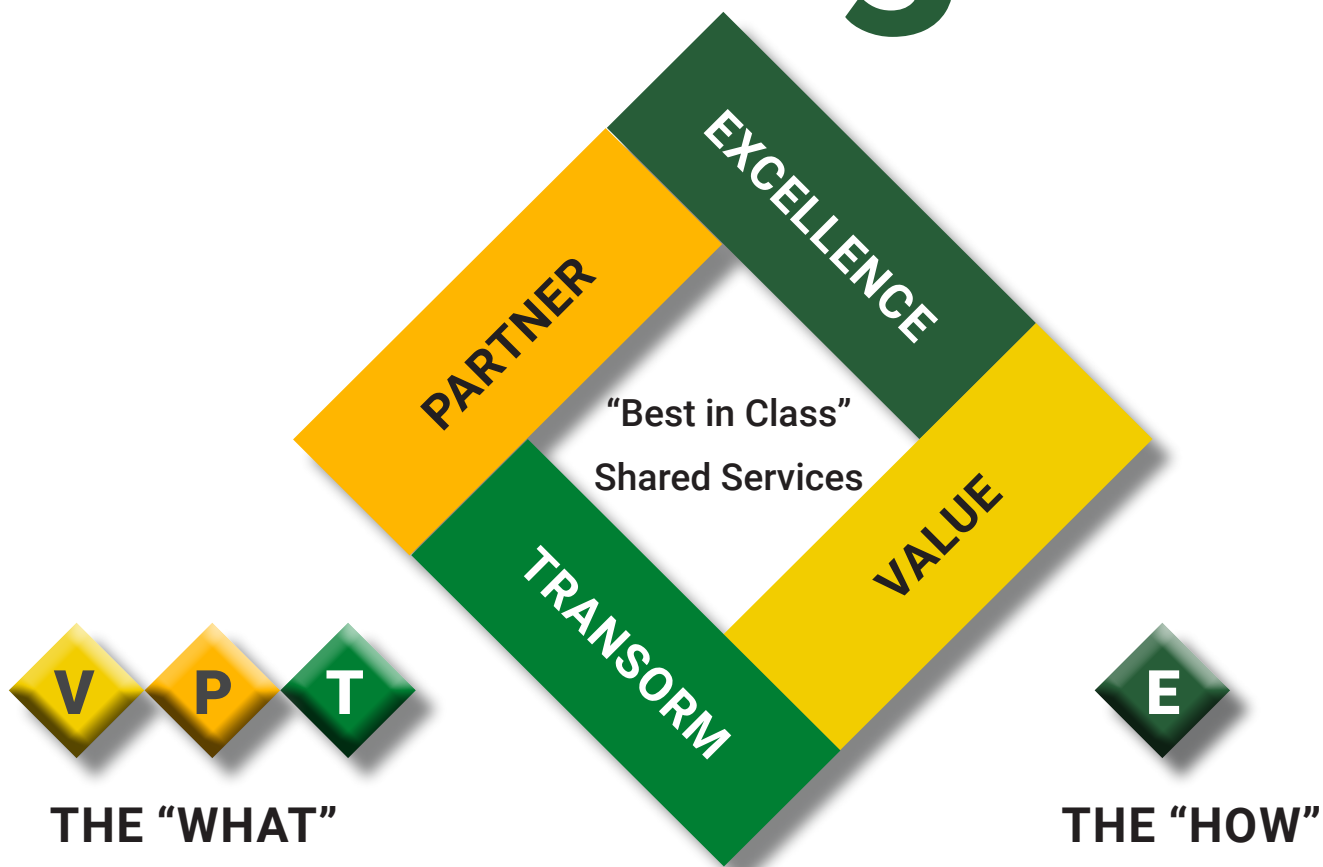
The success of Shared Services is reliant on these two components: the **“how”** and the **“what”**.

1. **“How we do our work”**, is critical in the evolution of the service excellence culture and meeting client expectations, while ensuring we are providing what our clients require versus what they want
2. **“What we do”** defines which services can be centralized, services to be transformed to improve overall client user experience and what creates the most value for the university

Under these components we have defined four goals; Excellence, Transform, Value and Partner. When these four goals work harmoniously together this is when "best in class service" can be achieved.

Each foundational area is defined with goals and strategies to achieve these goals, along with initial ideas for initiatives to achieve the goals. These will be reflected in our "Key deliverables" on a yearly basis.

Goals and Strategies





EXCELLENCE

GOAL 1. Develop a culture of Service Excellence and Delivery within the team who are the heart of “how” we perform our work and service to our clients.

1.1 ‘One Shared Services’: Invest in promoting a safe inclusive environment where diverse perspectives are respected and heard and the power of connection drives collaboration, the exchange of knowledge identify solutions.

1.2 Accountability: Have the right people, in the right roles and working in the correct stratum. Taking ownership for their work, their actions maintaining the “one university” statement from of mind.

1.3 Engagement: Building and engaged, empowered and skilled workforce of the future, developing in-house talent and enabling managers to be confident empowering leaders. Grow areas of expertise in-house and develop our people’s skills and focus on improving customer and employee engagement, continuously striving for excellence.

1.4 Empowerment: Focus on solutions and viewing feedback, surveys, metrics and errors as learning opportunities in the work that we do. Using coaching and mentoring to advance growth and opportunity.

1.5 Integrity: Support the operating model while maintaining its integrity for the benefit of the university as a whole, doing what is right; not easy, maintaining the values of the team in the face of adversity.



TRANSFORM

GOAL 2. Evolve Shared Services to be a “best in” class university service unit

2.1 Forward Thinking Solution Design and Service Delivery:

Engage with clients on an ongoing basis to understand their requirements and expectations to deliver solutions that support them today, tomorrow and into the future (taking into account changes to legislation and staff agreements).

2.2 Accessibility, Community + Belonging: Create services that are available any time, anywhere, by any one for whom the service has been created.

2.3 Continuous Improvement: Work to remove the “status quo” and identify different and innovative ways to deliver services safely to our clients, drawing on best practices to deliver consistency across the university and in alignment with Uniform results. Practicing “progress over perfection” to leverage quick wins in addition to longer term plans.

2.4 Data: Establish standards for data and master records to provide accurate reporting to support decision making and operational planning.

2.5 Technology: Embrace new technology and new ways of working to enable our clients to be confidently self-sufficient supported in the work that they do.

2.6 Services Level “Stretch” Expectations: Determine service level expectations to set expectations; determine, monitor and update service level objectives (by service) that reflect our ongoing commitment to meet or exceed client expectations in step with our capabilities and capacity.



VALUE

GOAL 3. Implement and optimize end-to-end services to achieve greater process efficiencies and cost savings

3.1 Process Management: Review and amend processes through process management and validation to create a seamless and end to end integrated delivery of service and client experience

3.2 Performance Indicators: Establish metrics and surveys to guide data driven decisions on performance concerns, redesign, project selection and allocation of budget dollars towards continuous improvement.

3.3 Expansion: Expand expertise and knowledge based services to areas of first contact thereby separating “client facing” services from “back office” operations.

3.4 Self-Service: Create opportunities to promote self-sufficiency for clients.

3.5 Redundancy: Reduce duplication of services, steps and unnecessary delivery channels.



PARTNER

GOAL 4. A trusted partner for all services and enable those who we support to become self-sufficient, efficient, and effective.

4.1 Communication: Establish consistent processes, methods and models of communication to ensure teams, stakeholders and third parties are appropriately informed and prepared for change.

4.2 Change Evolution: Lead and drive change, supporting the university to build its desired culture so that together we become self-sufficient and effective.

Be ambassadors throughout all areas of interaction, ensuring that we engage, inform support and empower others through change.

4.3 Collaboration: Build efficient, effective and economic ways of working by collaborating (both internally and externally) sharing services, sharing knowledge, building relationships and focusing on the needs of our clients.

4.4 Voice of the Client: Develop mechanisms for collaboration and feedback into current and redesign services.

SHARED SERVICES

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*Operational Plan
Summary*

