

The Journey to Shared Services



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the Big Tent



2024 Presidents Institute

Independent Higher Education in a Democratic Society

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Proposal Consultants



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Presenters

Dr. Kathleen A. Getz, President, Mercyhurst University

Dr. Mark A. Heckler, Retired President, Valparaiso University

Dr. Paul Hennigan, Retired President, Point Park University



College and University Sustainability Project, Inc. (CUSP)



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Yesterday

- Convening Conversations
- Leveraging Conversations
- Creating a Vision
- Seizing an Opportunity
- Designing Governance



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Today

- Two Schools and a Plan
- Half the Funding
- A Willing Foundation Partner
- A Robust Business Model
- A Refined Case



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Tomorrow

- Is there a model that will attract sufficient partners to sustain it?
- Is there a way to overcome the cash flow barrier to entry?
- Will our ERP partners be patient?
- Will our campuses maintain membership through presidential and staff transitions?
- Will our campus constituents tolerate the change?



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Lessons Learned

- Importance of Stable and Courageous Presidential Leadership
- Need for a Compelling Vision (HINT: It's not cost savings).
- Centrality of a Robust and Conservative Business Model, Financial Projections, Stress Testing



Western Pennsylvania Higher Education Shared Services Project



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Background

- Great interest
- No time, no money
- Foundation support



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Phase 1: Pilot Feasibility Study

- Five Schools
- Steering Committee
- Eight Areas



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Phase 2: Solicitation of Interest

- 17 Schools interested
- 15 Schools - Procurement
- 6 Schools – IT Platform, Software (ERP), Security



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Phase 3: Business Planning

- Procurement
- IT Platform, Software, Security
- Legal Work



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Phase 4: Implementation

- Governance Structure
- Philanthropic Funding
- Creation



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Lessons Learned

- Commitment from Presidents
- "Herding Cats" (Busy Cats)
- Over Communicate – All (2) Stakeholder Groups
- Media – Even Unflattering and Inaccurate (Imagine That!)
- Philanthropy is Key



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Q&A Session



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Thank you for attending
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