What is Fiscal Shared Services:

Team of fiscal experts that serve as fiscal advisors to academic and non-academic units

- Not just accountants that processes transactions and reconcile accounts

Team is centralized in Academic Affairs

- Fiscal advisors can serve multiple units, or just one unit depending on scope and size of the unit
- Report to directly to the Director of Financial Operations and unit Dean/Director/Department Chair (responsible to the unit/s they are serving)
- Level of services vary from direct fiscal reporting to all levels of fiscal processes and reporting

Examples of current participants include *(currently have 23 shared service agreements)*

- College of University Libraries and Learning Sciences
- College of Fine Arts
- College of Education
- Department of Athletics
- Division of Student Affairs
- Anderson School of Management
Fiscal Shared Service Team:

Team of Experts

- Have a well rounded team of individuals who have extensive experience in finance and accounting working both in academic and non-academic units at UNM, as well as external experience working in private and public accounting
- Knowledge from fiscal transactional processes to high level fiscal analysis and strategic planning

Team Approach

- Uniform fiscal structures; each unit is setup with a multi-year forecast to manage budget and fiscal controls
- Staff is cross-trained and work collaboratively by serving as backup to units outside of scope, responsible for training incoming staff and interns, and sharing ideas
- Mentorship opportunities
  - Staff has a team of accounting experts to work on developing skillsets and collaborating with other fiscal staff across campus
- Accounting Internship Opportunities
  - Approximately 50% of the team is built of UNM undergraduate and graduate students who receive hands-on experience in professional accounting
- Mitigate turnover
  - Impact to units is minimal when staff turnover because the structure allows for another team member to step in and move forward quickly
Our Philosophy

• **Customer Service Oriented**
  • We are here to provide **excellent customer service**
  • We are here to provide quality services to everyone in the unit! We don’t just serve the Dean/Director/Department Chair, we provide assistance to all: faculty, staff and students in the entire unit
  • We are responsible to uphold the University’s policies and procedures, however we need to help units navigate policies and procedures (we are not about saying no! we are about providing resolutions and getting the task completed!)

• **Strive for Excellence**
  • Our team looks for process improvements and cost savings
  • We want to gain knowledge and learn about functions outside of finance and accounting (value of working in an Academic and Research environment)
  • We have expertise in report writing and data analysis, which we can apply to other operating functions besides fiscal operations
Organizational Structure:

Nicole Dopson, Director of Financial Operations

Francisco Certain, Accounting Manager
  Provost Units
  Division of Equity and Inclusion
  Center of Regional Studies
  President’s Org.
  University Libraries
  Safety of Risk Services
  Board of Regents
  Division of Student Affairs

Kara Moeller, Financial Analyst
  Continuing Education
  College of Education
  Athletics

Larry Brown, Fiscal Service Tech

Keni Overholser, Fiscal Service Tech

Accounting Interns:
  Kaitlyn Anderson (GA)
  Jaqueline Valencia
  Maya Vazquez
  Serena Duran
  Aaliyah Lucero
  Lorena Garcia-Falcon

Amanda Branham, Fiscal Service Tech

Bobby Silva
  Accountant 2
  College of Fine Arts
  Art Museum
  School of Architecture and Planning
  Honors College
  Harwood Museum

Kayla Feits
  Accountant 1
  Extended Learning
  Alumni Association
  Anderson School of Management

Denise Garcia-Pogzeba, Admin. Asst. to Director

Looks like this...
Organizational Structure:

...but really is this!

This is not another top down structure! This is a team effort, who likes to have fun in the process!
Why Use Fiscal Shared Service:

**Opportunity for cost savings**
- From pilot in FY15 to FY21 total recurring savings approximately **$10.3 Million**
- Annual recurring savings with current agreements **$2.25 Million**
- Other unrealized savings not quantified; examples include streamlining reporting efforts, transactional processing efficiencies, refined budget and fiscal management controls implemented to reduce risk, and providing real-time data analysis for strategic planning

**Customer Service Oriented (we work for you!)**-
- Annual shared service agreement holds FSS accountable to providing excellent services

**Access to team of experts**
- Avoid concerns of having to supervise staff and potential turnover
- Units can utilize all FSS staff from purchasing experts to expertise in financial analysis and strategic planning

**Director of Fiscal Shared Services can serve as your direct advocate to executive leadership and the Budget Leadership Team**

**Opportunity to collaborate with other units**
- FSS servers multiple units with various scope of activities across campus, FSS can help units find opportunities to collaborate
Interested in learning more about Fiscal Shared Services?

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