

The Right Blend? A Shared Services Model at Monash, Reflecting on our First Year.

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Connie Mogg was appointed as the Manager, Research and Revenue Accounting Services for the Faculties of Medicine, Science, Engineering and Pharmacy at Monash University in January 2011. Prior to this role Connie was the School Manager for the School of Public Health and Preventive Medicine also at Monash University, and has also held several administrative positions at both Deakin University and UNSW. Prior to entering the tertiary education sector, Connie worked in administrative roles in both the public and private health sectors. Connie holds a Graduate Certificate of Commerce from Charles Sturt University and is an Associate Fellow of ATEM.

Joel Chibert was appointed as Monash University's Director, Research and Revenue Accounting services in November 2010 after initially joining the University from the Chartered Accounting profession as its Group Accountant in 2006. Joel is responsible for the University's Research and Revenue Accounting Division (R&R) and led the engagement with the University the resulted in the establishment of the shared service.

Joel has been a director of Monash Health Research Precinct Pty Ltd since 2007, a member of the Monash Investment Holdings Pty Ltd management committee since 2008 and a member of the IITB-Monash Research Academy Audit Committee and the Monash University Intellectual Property Committee since 2010.

Joel holds a Bachelor of Commerce from the University of Melbourne and is a Member of the Institute of Chartered Accountants Australia (ICAA) and the Australian Institute of Company Directors (AICD).

Providing both a cost effective, as well as an efficient administrative service, remains a challenge for most Australian Universities. Often, cost effectiveness comes at the expense of a quality service.

With the requirements for administrative compliance becoming increasingly complex, the importance of not compromising on the quality of administrative services is also increased. But as the demands on funding become more competitive, it has become essential that universities provide these services in a more cost effective way.

As part of an administrative restructure in January 2011, Monash University established the Research and Revenue Accounting Services. Moving to a central reporting line, a team of professional staff was established to provide financial management and advisory services for all non-teaching funding across the university.

Prior to January 2011, financial transactions and reporting activities were undertaken by staff employed directly by Faculties, School and Central Portfolios. While some areas did this very well, other areas were poorly resourced which resulted in inconsistent information, procedures and service - particularly to academic staff. There was also widespread non-compliance with rules and guidelines, mainly due to a lack of access to up to date information, which had the potential to place future funding in jeopardy. In addition, the staff engaged in these duties had various skill levels and knowledge as there was also no collective approach to training. This level of diversity made it difficult for other central areas such as the Monash Research Office and the Central Finance Division to communicate important information. The model was also not cost effective for the university as a whole - as there were in excess of 900 staff who had finance as a part of their role.

While many administrative restructures move the service away from the actual location of the clients to one central area, the Research and Revenue Accounting Services defied this trend by locating specialist teams within the different academic areas across the university – but with a reporting line through to the University’s Chief Financial Officer.

The implementation of the new shared services model for research and revenue accounting services, introduced regular monthly reports to all research groups across the university, consistent and up to date advice to researchers on the management of their grants, timely invoicing to funding bodies, accurate GST treatment of revenues, a collective and consistent approach to external audits and reviews by major funding bodies such as NHMRC. It also introduced uniform and regular training in procedures for the staff employed in the hub which helped ensure that all areas had access to the same level of service, and it enabled other areas of the university to communicate information in a consistent manner to one group.

A year on, we share our experiences. Our achievements and what we could have done better.