

## **Finance & Procurement Services Reorganization: OUC Updates** <sup>[1]</sup>

### **What Has Changed**

The Office of University Controller (OUC) and the Procurement Service Center (PSC) have reorganized how they deliver Help Desk and Training Services to CU's campuses.

In the past, these solutions for both finance and procurement were provided by the OUC's Finance & Procurement Business Services team, including the FinPro Help Desk. While this has worked well over the years, our offices feel that optimal customer service at this time will be delivered by separating the two functions, enabling each office to focus on its core mission. Therefore, in fall 2021, responsibility for *procurement* Help Desk and Training transferred from the OUC to the PSC.

### **What this means to you...**

With this restructuring:

- The OUC has redesigned its Finance & Procurement Business Services team. The new unit – Financial Services & Solutions <sup>[2]</sup> – focuses on training modalities/methods and content related to finance, financial reporting, fiscal responsibilities, and the OUC's Continuing Professional Education Program. This unit continues to provide the finance-related assistance previously available from FinProHelp. You can reach us by emailing [FSS@cu.edu](mailto:FSS@cu.edu) <sup>[3]</sup>.
- The PSC has restructured to form a new unit – Customer Success & Organizational Excellence <sup>[4]</sup>, including a PSC Service Desk – to deliver help desk, training, and other services for purchasing, payables, travel, and related areas. The PSC Service Desk now provides the procurement-related assistance previously delivered by FinProHelp. You can reach them by emailing [PSC@cu.edu](mailto:PSC@cu.edu) <sup>[5]</sup> or calling 303.837.2161 (the former FinProHelp number).

The reorganization was initiated jointly by the OUC and PSC with the purpose of redistributing our resources more effectively. By enabling each office to focus on its core mission, we will enhance the service and leadership that each provides to internal and external customers.

We welcome your ongoing input on this reorg. Please use the Questions & Feedback form (below) or reach out to FSS Director Normandy Roden <sup>[6]</sup>.

## Overview: Our New Organizational Structure

Here's how we're reorganizing our office to better serve you:

- The current Finance & Procurement Business Services unit (which used to include the FinPro Help Desk) is being reengineered as a center of excellence in training and communications. The new name for this unit is **Financial Services & Solutions**. You can reach us at [FSS@cu.edu](mailto:FSS@cu.edu) [3].
- The mission of Financial Services & Solutions is to improve user experience with financial systems and forms, and to design training (videos, webinars, interactive websites, etc.) and strategic communications on a variety of issues (including finance, financial reporting, fiscal roles and responsibilities, train-the-trainer, and topics in our continuing professional educational program).
  - Training may be delivered directly by the OUC, or may be developed to further the missions of the individual campus finance offices and therefore be delivered by the campuses.
  - A key service of the new unit will be its focus on helping campus finance teams continuously improve their own customer service through best-practice sessions on designing webinars, classroom training, communications, websites, and motion graphic/live videos. We're looking forward to collaborating with you so that we all deliver the best possible experience for CU employees as they fulfill their fiscal roles and responsibilities.
  - An early priority -- in response to campus feedback -- is the automation of paper Finance forms [7].

For the OUC's redesigned org chart, [click here](#) [2].

## What Happened to the FinPro Help Desk?

For years (as indicated by its name), the FinPro Help Desk responded to both finance and procurement inquiries. With this reorganization, we have separated the two areas, and the FinPro Help Desk no longer exists.

- The new PSC Service Desk is now responsible for answering questions about Concur, Marketplace, and PSC procedures and forms.
- Unlike *procurement*, which is a centralized function at CU, *finance* is distributed across the campuses and System Administration. As a result, there is not an equivalent need for a centralized "finance help desk." Therefore, the OUC's new Financial Services & Solutions unit will not be structured like a typical help desk/call center. However, customer service will remain a key focus.
  - Continue to reach out to your campus controller teams [8] for accounting and other assistance, as you have in the past.
  - Continue to contact the OUC's FSS team for fiscal policy, forms, and finance/reporting-related inquiries, as before.

## Fiscal Policies and Procedures

The OUC's Financial Services & Solutions team can assist you in finding the appropriate fiscal policy and in interpreting it/applying it to your specific situation. Note that the OUC and the PSC have identified ownership of the various policies/procedures for which the FinPro Help Desk traditionally provided guidance. To find out where to go to get help on specific procedures, refer to the following websites: [PSC Policies & Procedures](#) [9], and [Where to Get Help: A Guide to Transition](#) [10].

## **Office of University Controller (OUC) News Forum: Share Yours!** [11]

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### **Links**

- [1] <https://www.cu.edu/controller/finance-procurement-services-reorganization-ouc-updates>
- [2] <https://www.cu.edu/controller/policies/ouc-org-chart> [3] <mailto:FSS@cu.edu>
- [4] <https://www.cu.edu/psc/policies/psc-organizational-chart> [5] <mailto:PSC@cu.edu>
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