



Higher Education Shared
Services & Outsourcing Week

Higher Education Shared Services & Outsourcing Week

June 2 - 4, 2025 | St. Petersburg, FL

*The Vinoy Resort & Golf Club,
Autograph Collection*



The World's Only Conference for Higher Ed Shared Services Leaders

A COMMUNITY OF VISIONARIES

Welcome to Higher Education Shared Services & Outsourcing Week!

Welcome to the premier Higher Education Shared Services event, hosted in beautiful St. Petersburg, Florida! This conference is your gateway to fostering **collaboration**, **building connections**, and **optimizing institutional business processes** through the power of shared services.

In today's ever-evolving environment, institutions face unique challenges: slow onboarding processes, **high attrition rates**, outdated technologies, and the ongoing need to **communicate the value of shared services to key stakeholders**. This year's program is thoughtfully designed to address these hurdles head-on through engaging Workshops, dynamic Panel Discussions, and practical Use Cases from leading universities, all led by shared services industry leaders.

Whether your shared services center is well-established, newly implemented, or still in the planning stages, Higher Education Shared Services & Outsourcing Week 2025 is the premier platform to discover innovative solutions and strategies that will help your institution grow and demonstrate its value year after year.

We are thrilled to have you join us in shaping the future of higher education. Let's make this an unforgettable experience together!

Who Should Attend?

- Provosts & Vice Provosts
- Chief Financial Officers
- Vice Presidents, Change Management
- Executive Directors, Advancement Services
- Heads of the Business Office
- Chief Executive Officers
- Chief Information Officers
- Chief Operating Officers
- Vice Presidents of Shared Services
- Vice Presidents HR Shared Services
- Directors of Shared Services



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and Business Intelligence
 Cornell University



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Assistant VP Finance and Operations
Shared Administrative Services
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Rainey Way
Executive Director of Business
Analytics and Process Improvement
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Vanessa Izadi
Senior Manager, People &
Talent People Center
 WGU

MAKE INFLUENTIAL CONNECTIONS

SENIORITY LEVEL



- 41% - Director
- 26% - Manager
- 13% - C-Suite
- 11% - VP-Level
- 9% - Non-Manager

The majority of attendees are decision-makers who control or directly influence the budget

FUNCTION



- 32% - Management
- 22% - GBS/Shared Services
- 16% - HR
- 13% - Operations
- 12% - Finance
- 5% - Other

A variety of industries means even more opportunities for benchmarking

“ The venue was perfect, the agenda was robust, the speakers were excellent, the **opportunity to network was phenomenal.**
- Manager, HR, Western University

“ I wish I had attended this conference years ago when I first started in shared services...The sessions were helpful, the venue was great, and the colleagues I met were friendly and sharp.
- Associate Vice President for Shared Advancement Services
UNC System Office

“ Very collaborative and ease of **making connections with other universities to learn and share.**
- Manager, HR, Western University



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VIEW ATTENDEE SNAPSHOT

Reimagine Higher Education Shared Services

Experience a fresh take on the future of shared services with transformative strategies and real-world success stories. Drive meaningful impact within your institution. Explore cutting-edge solutions from industry experts who understand Higher Education's specific needs. Stay ahead of emerging trends that could revolutionize your operations.

Elevate Your Value Proposition

Master the art of showcasing your department's contributions with actionable insights into KPIs, data storytelling, and stakeholder alignment. Make your value impossible to ignore.

TOP REASONS TO ATTEND

Build a Peer Network That Matters

Collaborate with like-minded leaders from across North America and join the largest network of Higher Education Shared Services professionals. Exchange ideas, discuss roadblocks, and form connections that last far beyond the conference. Together, we're shaping the future of shared services for colleges and universities everywhere.

Content Designed for You, By You

Discover sessions crafted specifically for Higher Education professionals, ensuring every topic resonates with your unique challenges and opportunities.

Invest in Yourself and Your Team - Earn 14.5 Credits!



Earn SHRM credits while gaining tools and techniques to accelerate your professional and organizational development.

LEADING AGENDA



SSON is recognized by SHRM to offer Professional Development Credits (PDCs) for SHRM-CP® or SHRM-SCP® recertification activities

Prerequisites: Basic knowledge of business services within any industry.
Advanced Preparation: None
Program Level: Intermediate
Delivery Method: Group Live

Pre-Conference Workshop Day - Monday, June 2, 2025

9:00 am **Registration Begins**

10:00 am **Workshop A: Shared Services 101: Leading Your Organization Through the Shared Services Journey and Avoiding Pitfalls**



10:00 am **Morning Break**

11:30 am **Workshop B: Designing with Purpose – Harnessing Design Thinking for Customer-Centric Transformation**

1:30 pm **Networking Lunch**

2:30 pm **Workshop C: Optimal Leadership Approaches to Change Management** | Casilda Clarich - Director, Financial Shared Services and Contracts and Procurement - Office of the Controller, The University of Texas System

Main Day One - Tuesday, June 3, 2025

8:00 am **Registration & Networking Breakfast**

9:15 am **The Power of Story: Transforming Stakeholders into Shared Services Advocates** | Calvin Turner Jr., Executive Director of UC Shared Services, UCPath

9:45 am **Manage Generational Diversity for Workforce Harmony**

10:15 am **Refreshment Break**

10:45 am **Panel Discussion: Break Down Silos for Unified Cross-Department Impact** | Laura Marrone - Assistant Director, Solutions Delivery, Florida Polytechnic University

11:30 am **Case Study: Building an Opt-In Shared Services Model That Lasts** | Henry Velez, Vice President Business Services, Rutgers University

12:00 pm **Networking Lunch**

1:00 pm **Interactive Discussion Groups (IDGs)**

2:25 pm **Networking Break**

3:00 pm **Battle Against Change Resistance to Improve Stakeholder Buy-In** | Kathleen Winningham - Senior Director, Knights Experience Team (kNEXT), University of Central Florida

3:45 pm **Case Study: Afya's Academic Shared Services Initiatives for Academic Innovation** | Victor Becho - Shared Services Director, AFYA and Izabela Nogueira - Academic SSC Director, AFYA

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(Continued) Main Day One - Tuesday, June 3, 2025

| | |
|---------|--|
| 3:45 pm | Manage Generational Diversity for Workforce Harmony |
| 4:15 pm | Cultivate Continuous Improvement as a Shared Priority Alyson Baxter, Assistant VP F&O Shared Administrative Services, University of Alabama and Rainey Way, Executive Director of Business Analytics and Process Improvement, University of Alabama |
| 4:45 pm | Prioritize Service Excellence with a Customer-Centric Approach Angela Chen - Chief Information Officer, University of Delaware |
| 5:15 pm | Drinks Reception |

Main Day Two - Wednesday, June 4, 2025

| | |
|----------|---|
| 8:00 am | Expo Hall Opens & Breakfast |
| 9:15 am | Case Study: Developing and Implementing an Effective Costing Model Brandon Gaines, Executive Director for Strategic Initiatives, Princeton |
| 9:45 am | The Road to "Best Place to Work": Internal Employee Engagement Practices to Increase Productivity and Lower Attrition |
| 10:15 am | Panel: Overcome Budgeting Constraints to Do More with Less Chase Loper, Assistant Vice President of Business Services, Duquesne University and Susan Nasher, Director of Budget Finance Academic Resource Analysis, University of Colorado Boulder |
| 11:00 am | Networking Break |
| 11:30 am | GenAI and ChatGPT: The Real Impact on Your Institution |
| 12:00 pm | Unlocking Hidden Potential - Strategic Talent Deployment for Maximum Value Chase Loper, Assistant Vice President of Business Services, Duquesne University |
| 12:30 pm | Lunch |
| 1:30 pm | Mastering Risk: Strengthening Enterprise Resilience Through Proactive Risk Management Christine Packard, Assistant Vice President, Enterprise Risk Management, University of Massachusetts |
| 2:00 pm | Prioritize Data Driven Decision Making for Maximum Business Transformation Chera Finkbiner, Sr. Director of Business Operations, University of Texas |
| 2:30 pm | Panel Discussion: Proactive, Not Reactive – What to Expect for the Future of Work |

WHERE COMFORT MEETS CONVENIENCE

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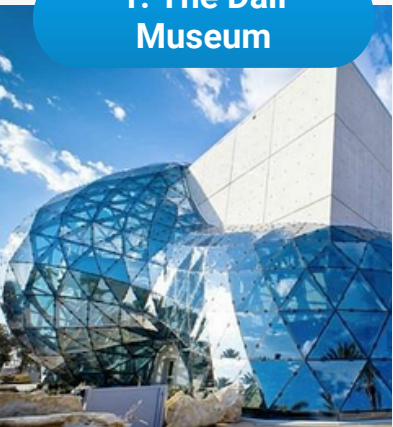
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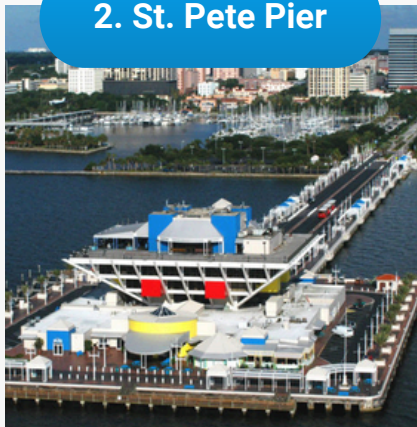


Top 5 Things to Do in St. Petersburg

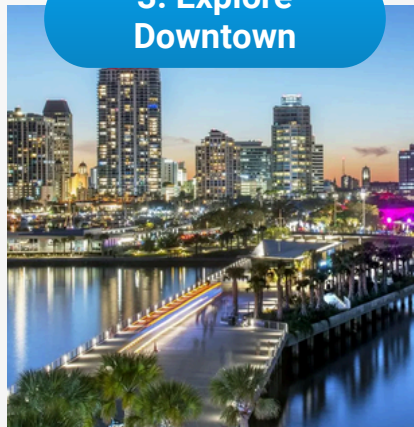
1. The Dalí Museum



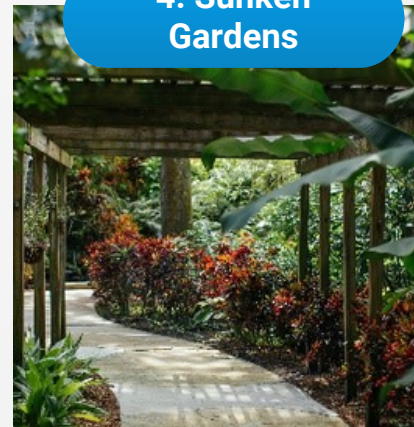
2. St. Pete Pier



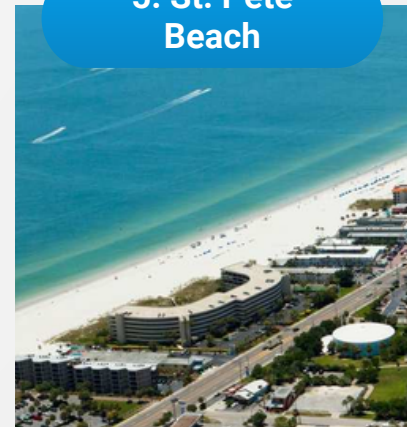
3. Explore Downtown



4. Sunken Gardens



5. St. Pete Beach



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What is SSON Research & Analytics

SSON R&A is SSON's global data center, now in its 7th year of operation. Thousands of practitioners and consultants recognize SSON R&A as their premier resource for shared services related metrics, benchmarks, trends, market analytics and advisory services. With a user-friendly interface, easily downloadable benchmarks and topic-based charts, SSON R&A adds valuable ammunition to your inhouse or client presentations, strengthening your business case and your credibility. SSON regularly canvases its membership for updated metrics and analytics, allowing us to highlight even minor shifts. SSON R&A distinguishes itself from other associations by offering subscribers direct access to relevant metric data at a highly competitive cost.

"The C-suite expects to see market metrics to evaluate shared services' performance. I have explored various opportunities available in the market. SSON Research & Analytics offers reliable benchmark data, at a highly competitive cost. Given access to this data, by region or industry, I can draw my own conclusions. I don't need to source expensive third-party analysts, as we can interpret the data ourselves."

Edoardo Peniche, Vice President, Global Business Services - Aptiv

What Tools & Services Are On Offer?



City Cube

Compare 3000+ shared services locations around the world, across 20+ variables such as: cost of labor, talent availability, number of shared services centers, average salaries, and much more.



Intelligent Automation Universe

A one-stop platform for all things RPA, cognitive and AI related that allows users to learn about dozens of IA software vendors, compare their product capabilities, understand the differentiators, and see their customer footprint.



Shared Services Atlas

Locate and evaluate shared services hotspots at country, state, or city level from our global database of 10,000+ global delivery centers. Filter by industry, function, and organization size.



Research Insight Reports

Our monthly RIR's are guided by industry insiders with at least 10 years' experience, and are underpinned by real-time market data to address not just the trends, but the solutions you need to implement.



Advisory Service

As a Premium subscriber you can access our industry experts for 1:1 guidance and actionable steps to propel your GBS journey. We also offer bespoke research services to support your projects with analytics, experience and knowledge.



Visual Analytics Workbooks

Curated charts under core topic headings that summarize the biggest trends and shifts across SSO/GBS.



Metric Benchmark

Benchmark your SSO across 130+ different metrics, choosing either a conglomerate of industry/country benchmarks; or the Top 20 Most Admired SSOs' benchmarks in the Metrics Intelligence Hub.

For more information on how to become a subscriber to SSON Research & Analytics and gain access to hundreds of metrics, benchmarks, city-based talent, a list of delivery centers globally, and monthly research-based reports, please contact:



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