TRANSFORMING ADMINISTRATION PROGRAM

Professional Staff Organization, November 1, 2016

http://tap.uw.edu

UNIVERSITY *of* WASHINGTON

What is TAP?

- The Transforming Administration Program, launched in spring 2015 by then interim President Cauce and Provost Baldasty, has a goal of **one university, one administration with a culture of service in UW's central administrative units.**

- A summer 2015 campus survey, along with feedback from UW leadership, administrative teams and academic units, was used to guide TAP projects.

- Since the launch, 41 projects have been initiated in four areas: Improving Service Delivery, Improving Data for Decision Making, Restructuring for Efficiency, and Building Capacity for New Strategies.

- In April 2016, TAP focus shifted to the "Big 3" areas of strategic concentration in the next year. TAP projects are tracked by Organizational Excellence (OE): http://tap.uw.edu/projects/tap

President & Provost "Big 3" Focus Areas

- Systems – currently focused on:
  - HR/Payroll
  - Finance Transformation

- Structure – currently focused on:
  - Executive office re-structure
  - Hiring Executive Vice President
  - Central Administration reorganization

- Accountability: currently focused on
  - Solutions First: Engage. Innovate. Deliver.

UNIVERSITY *of* WASHINGTON

TAP FY17 Goals

- Assure policy development/changes are widely vetted and communicated, including having advisory groups for all Central Administration functions

- Standardize reporting of metrics for transactional work

- Develop how-to guides

- Increase Central Administration accountability to campus units

- Develop TAP recognition program

- Go paperless/hold "green" meetings

What does TAP project success look like?

- Value-based decision making

- Clear and consistent policy development and implementation

- Collaborative, solutions-oriented customer service

- Easily accessed and consistent data for decision support

- Engaged, empowered and collaborative leadership working together

- Continuous process improvement and innovation

Updates on Top Improvement Areas identified by Administrators' Council, and Board of Deans and Chancellors in 2015

- **Academic Personnel**
  - Team mapped the hiring plan submission business process and created a web-based submission tool. The tool gathers required information, and provides submission and approval status tracking, as well as one source of information
  - Initial feedback is positive and team plans to issue satisfaction surveys

- **Office of Sponsored Programs**
  - Re-focused manager portfolios to provide closer attention to process consistency, efficiency and outreach
  - Reconfigured contracts team so that it effectively handle specialized contracts, including clinical trial agreements
  - Worked with Procurement Services and campus administrators to improve processing of subawards (from 6 weeks to 15 days)

Updates on Top Improvement Areas Identified by Administrators' Council, and Board of Deans and Chancellors in 2015

- Access to Financial Data

  - Office of Planning and Budgeting's (OPB) Institutional Analysis team developed self-service dashboards that compare UW's revenues, expenses and endowment values and financial data reported by peer institutions

  - OPB and UWIT's Enterprise Data Analytics team streamlined sourcing of data, founds ways to provide data in a more timely manner, and adjusted the presentation of certain data to enhance user experience

  - UW Finance Transformation began work on the Administrative Finance Portal, including inventorying sites that contain financial policies. The work team included Financial Management, Grant & Contract Accounting, Student Fiscal Services and the Office of Planning & Budgeting

Updates on Top Improvement Areas Identified by Administrators' Council, and Board of Deans and Chancellors in 2015

- Cost of Facilities

  - Capital Planning & Development and Facilities Services staff, along with key campus customers, worked together on a plan to drive down the costs of remodels, design and small projects in both organizations while improving service delivery satisfaction

  - Small projects are defined as $50k-$350k, to include office renovations, labs and animal care facilities

  - Improvements have reduced costs by 10% in Facilities Services and 10 -15% in Capital Planning & Development, with more improvements underway, including working with State Relations to modify state law to raise thresholds for small works

Updates on Top Areas of Concern from 2015 TAP Survey

- Procurement Services
  - Added more staff to Procurement Customer Service (PCS) team. Also reduced meetings, to provide PCS staff dedicated concentration time
  - Set standards for PCS e-mail response (2 days) and phone response (same day). As of May 2015, team is achieving goals of 90% for both
  - Improved website, customer service training, and subaward process in e-Procurement
  - Launched initiative to improve customer service across several departments, beginning with restructuring to consolidate support for similar transactions
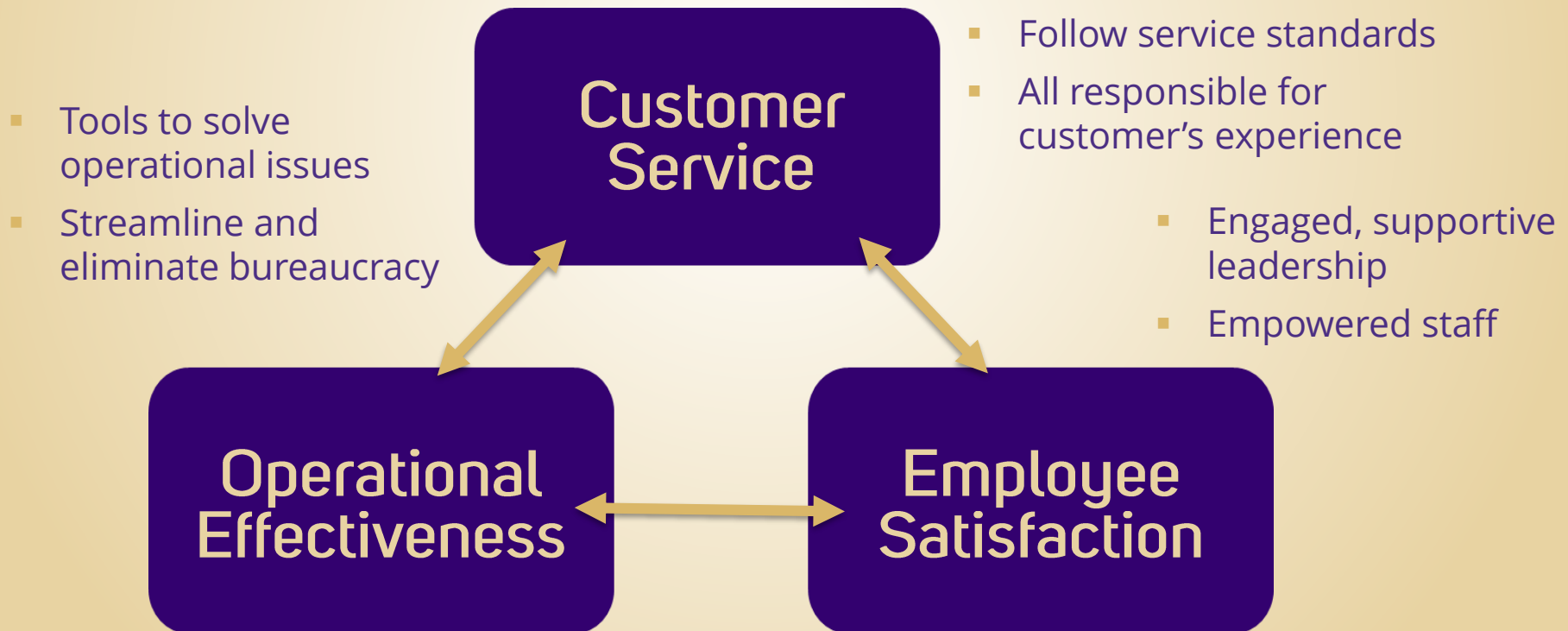
- Coordination between Research Support Offices
  - The Office of Research Information Services and the Office of Sponsored Programs (Office of Research) and Grant & Contract Accounting (Finance and Facilities) collaborated to create a Funding Status tool, announced in January 2016. The tool gives campus access to sponsored programs information, from proposal processing through award receipt and budget set-up
  - Tool provides a personalized dashboard, status visibility, contact information, important award comments and direct links. Metrics (February – June) show an increase of 159% unique campus users.

UNIVERSITY *of* WASHINGTON

Your Top Three?

- We'd like to hear from PSO members on what needs improvement in Central Administration

- Please fill out the half sheet and return to Lauren when you leave

- Talk with those around you to understand their ideas too

Solutions First: Engage. Innovate. Deliver

When everyone is focused on delivering value for others across the university, there's a true culture of service.

- Tools to solve operational issues
- Streamline and eliminate bureaucracy

Customer Service

- Follow service standards
- All responsible for customer's experience

- Engaged, supportive leadership
- Empowered staff

Operational Effectiveness

Employee Satisfaction

Approach

We've developed a 3-stage approach:

- Stage 1: Blueprints
  - Introduce key concepts
  - Adopt service standards
  - Identify core services, customer needs and feedback mechanisms

- Stage 2: Construction
  - Training and information
  - Gather customer input
  - Focus on service improvements

- Stage 3: Maintenance
  - Continuous improvement
  - Work across units

Accountability Update

- The 2015 TAP survey highlighted ways Central Administration is serving customers well, and areas for improvement: responsiveness, knowledge/understanding, customer service focus, consistency, accessibility

- Service Delivery Survey to be conducted in Winter 2017

- Ambassadors now identified for each unit (defined as reporting to a Vice President, Vice Provost, Chancellor and a few others)

- Celeste Duncan is working with ambassadors to roll out standards, provide training and tools

UNIVERSITY *of* WASHINGTON

Solutions First: Engage. Innovate. Deliver.

- What does "**Solutions First: Engage. Innovate. Deliver**." mean to you?

- What are the characteristics of service providers who provide a culture of service?

- What are examples of units who provide this type of service?

Organizational Excellence Forum

Please join us for the OE Forum on November 9th

ORGANIZATIONAL EXCELLENCE FORUM

AUTUMN 2016

WEDNESDAY, NOVEMBER 9, 1-3 P.M.

ETHNIC CULTURAL CENTER (UNITY SUITE) | UW SEATTLE CAMPUS

During the OE Forum, you will **learn and discuss**:

- What's new with TAP and **Solutions First**

- Enrollment Management case studies on Financial Aid Modernization and Admissions Modernization

- How to reduce customer effort through positive language

Please register at pm.uw.edu/2y2d/oe/node/26

ORGANIZATIONAL EXCELLENCE
UNIVERSITY *of* WASHINGTON

UNIVERSITY *of* WASHINGTON

TAP Website/Slides Available

- TAP Website/resources: https://tap.uw.edu

- Submit an Improvement Idea: https://tap.uw.edu/suggest

Thank you!

Questions and Discussion