

# University of Florida

## Service Innovation – An Evolutionary Approach to a Continuous Improvement Culture



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*About Us*

# University of Florida

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## University of Florida – The Flagship



*With an enrollment of nearly 50,000 students annually, University of Florida (UF) is home to 16 colleges and more than 150 research centers and institutes.*

## University of Florida (Cont'd)

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- Florida's leading university is one of the most comprehensive and academically diverse universities in the nation. UF is a land grant university with two teaching hospitals, a veterinarian school, and a law school
- UF is a member of the Association of American Universities
- UF is consistently ranked among the nation's top universities:
  - No. 14 in U.S. News & World Report "Top Public Universities" (August 2015)
- Recognized nationally for value
  - No. 3 in Kiplinger's "Best Values in Public Colleges (2014)
  - No. 1 in Washington Monthly magazine (2013)

## University of Florida (Cont'd)

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### Faculty

- UF has 4,300 faculty members with distinguished records in teaching, research, and service

### Students

- More than 90% of incoming freshmen score above the national average on standardized exams
- The fall 2014 incoming freshman class had an average 4.4 GPA and a 1960 SAT score
- Nearly two-thirds of UF graduates leave the University with no student loan debt. For the remaining third, their average indebtedness is roughly \$17,000, compared with the national average of nearly \$27,000

### Alumni

- More than 367,000 alumni are located throughout the world. UF graduates can be found in all 50 states and more than 135 countries, truly demonstrating that the Gator Nation is everywhere

## University of Florida (Cont'd)

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### Research and Discoveries

- UF is a leader in research and discoveries that improve the lives of individuals throughout the state, nation, and world
- UF expended more than \$740 million in research in 2012
- Gatorade<sup>®</sup>, the world's most popular sports drink, is just one of hundreds of commercial products resulting from UF's research
- UF ranks 11<sup>th</sup> among all universities, public and private, in the number of U.S. patents awarded in 2012

## About Us

# ScottMadden

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ScottMadden is a management consulting firm with more than 30 years of deep, hands-on experience.

We deliver a broad array of corporate and shared services consulting services—from strategic planning through implementation—across many industries, business units, and functions.

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W E D O

**WHAT IT TAKES  
TO GET IT DONE  
RIGHT**

.....

CORPORATE & SHARED SERVICES

### EXPERIENCE

Our experienced team has been a pioneer in corporate and shared services since the practice began decades ago. We employ deep, cross-functional expertise to produce practical, measurable solutions.

### SCOPE

We have completed more than 1,100 projects since the early 90s, including hundreds of large, multi-year implementations. Our clients range across a variety of industries from higher education to energy to non-profit. Our areas of expertise span the spectrum of middle and back office administrative services.

### SERVICES

We have helped our clients with business case development, shared services design, shared services build support, and implementation.

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**ScottMadden has provided a multitude of services to 20 higher education institutions. For more information visit: [www.scottmadden.com](http://www.scottmadden.com).**

## About Us

# Areas of Focus at UF

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### ASSESS AND PLAN

- Strategic planning
- Feasibility analysis
- Leading practice assessment
- Performance evaluation
- Project planning
- Leadership education and buy-in
- Competency assessment tool
- Change readiness assessment

### BUILD

- Project management
- Detailed organizational design
- Staffing
- Process redesign
- Technology design, selection, implementation, and support
- Education and training
- Change management

### FINANCE AND ACCOUNTING

### HUMAN RESOURCES

### CONTRACTS AND GRANTS

### DESIGN

- Current state analysis
- Future state design
- Business case development
- Service delivery model design
- Work scope delineation
- Organizational design
- Technology evaluation
- Implementation planning
- Change management

### IMPROVE

- Governance
- Operations improvement
- Process redesign
- Metrics and performance management



## Overview

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## Background and History

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- UF embarked on a journey in 2010
  - It faced common higher education challenges—shrinking funding sources and growing administrative expectations with reduced staffing
- With cost pressures mounting, UF explored a university-wide shared services solution
- Value proposition was high; however, without the support, the model could not be achieved
  - Benefits not widely understood or adopted by most colleges or unit leaders

## Background and History (Cont'd)

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- Several units pre-emptively set up service hubs:
  - College of Arts and Sciences (CLAS)
  - Institute Food & Agricultural Sciences (IFAS) – 2 hubs
- The CFO administration established a pilot service center to support several administrative units (Tigert Hall)
- In order to continue the positive momentum, the Core Office leadership re-evaluated the strategy and plan

## Resetting the Strategy

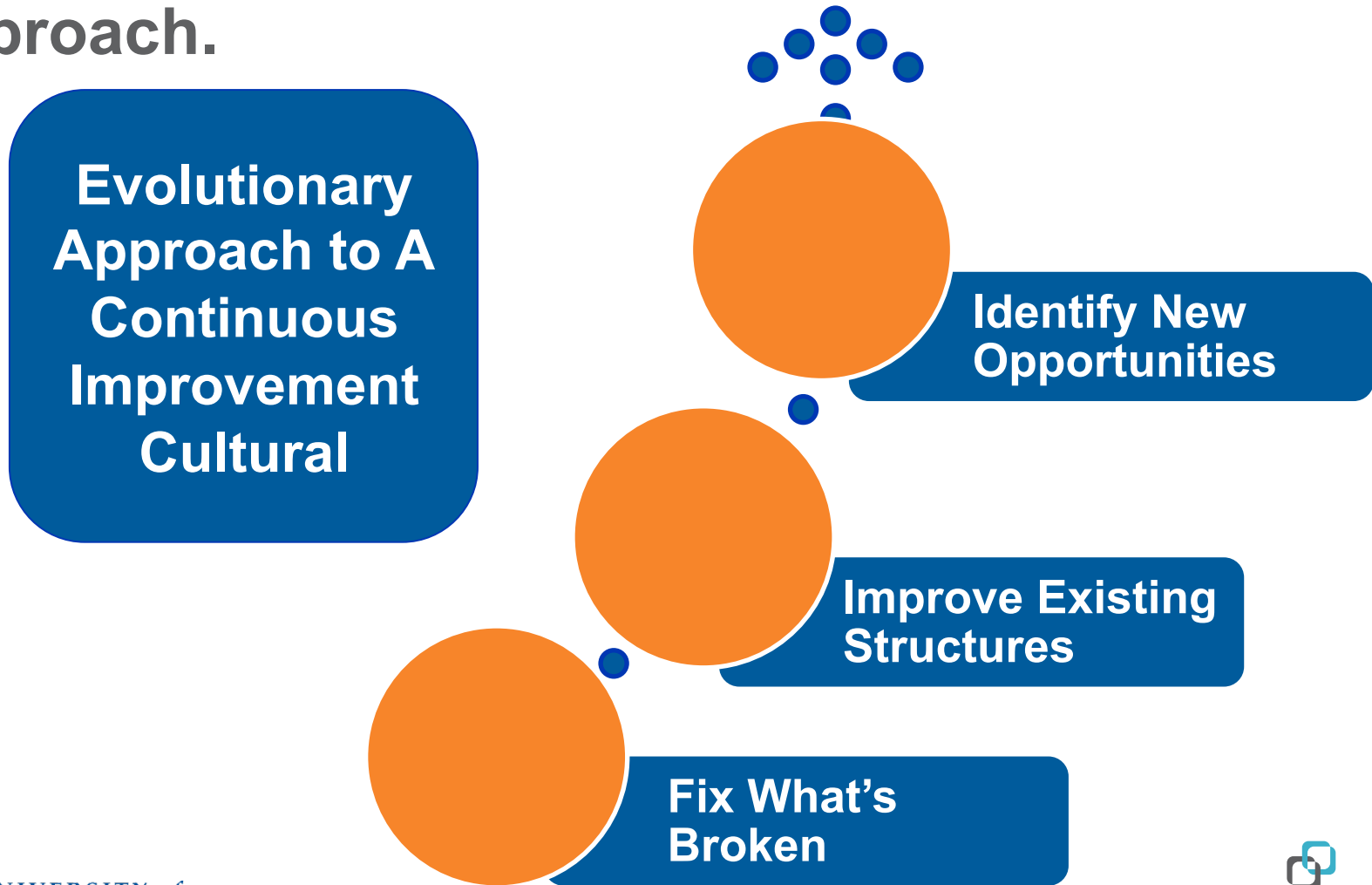
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- No top-down mandate; instead instituted a grass roots, evolutionary approach
- Developed a near-term service strategy and culture to create a solid foundation for a longer-term vision
  - Improved quality of customer service
  - Increased compliance
  - Increased available funds to reinvest in college priorities (long-term goal)
- Enabled strategy with incremental changes that will evolve and mature over time

## Resetting the Strategy (Cont'd)

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The new strategy followed a three-pronged approach.



## **Evolutionary Approach**

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# Fix What's Broken

## Core Office service improvement

- Collected field input
- Identified and prioritized issues
- Launched project to evaluate and recommend improvements for three key processes:
  - Departmental reconciliations
  - Employee personnel transactions
  - Pre- and post-award process

Process	Description of Improvement Opportunity	Priority (H, M, L)	Process Owner
<b>Human Resources</b>			
Personnel transactions	<ul style="list-style-type: none"><li>• Eliminate processing delays</li><li>• Improve interface with hubs/administrative staff</li><li>• Improve error detection and resolution methods</li></ul>	H	To be assigned
Directives and procedures	<ul style="list-style-type: none"><li>• Create formal approach for communicating changes to directives</li><li>• Ensure all information is up to date and accurate</li></ul>	M	To be assigned
<b>Contracts and Grants</b>			
Signatures and approvals	<ul style="list-style-type: none"><li>• Reduce required signatures and approvals to drastically improve turnaround time</li></ul>	H	To be assigned
Funds release	<ul style="list-style-type: none"><li>• Reduce turnaround time for releasing funds upon award notification (e.g., from 14 days to 3 days)</li></ul>	H	To be assigned
Close outs	<ul style="list-style-type: none"><li>• Reduce turnaround time to close out grants</li></ul>	M	To be assigned
<b>General</b>			
Directives and procedures	<ul style="list-style-type: none"><li>• Review and evaluate language in existing directives to eliminate items open to interpretation</li></ul>	H	To be assigned
Questions and answers	<ul style="list-style-type: none"><li>• Reduce inconsistent answers depending on individual</li><li>• Reduce delay in responses</li></ul>	H	To be assigned
Audit	<ul style="list-style-type: none"><li>• Standardize audit approach and compliance requirements</li></ul>	H	To be assigned

# Fix What's Broken (Cont'd)

## Core Office service improvement (Cont'd)

- Identified additional pain points and opportunities
  - Instructor workload process and system overhaul

Issue	Design Decision	Improvement	Status
Instructor Workload File (IWF)	■ Replace the IWF with new	■ Streamlined system will use	Included in
Process ownership	■ Process ownership assigned to	■ Clearer direction for Campus	Complete
Issue	Design Decision	Improvement	Status
Inaccurate instructor	<b>Enforcement mechanism (gates)</b> ■ Implement an incentive system consisting of fines and rewards based on Department performance in instructor workload	■ Possible fines/rewards will motivate Departments to complete their instructor workload accurately and on time	Communication effort to begin in December
Commitment			
Data validity	<b>SIF – IWF connection</b> ■ SIF inputs will be transitioned to the Section File where the same data is available	■ Will allow for independent processes	Included in process design
Switching sections	<b>Effort, IWF, Graduate and Course Scheduling roles within Departments</b> ■ Flow-through of information from course scheduling, GIMS to instructor workload ■ Common user environment ■ View-only access to instructor workload by other departmental staff	■ Design decisions will combine to encourage closer coordination between	Included in process design
IWF Error			
Training	<b>Lack of Instructor input</b> ■ Instructors will receive notifications approximately 4 weeks prior to end of term notifying them of courses to which they have been assigned*	■ Will decrease time until potential mistakes are caught by 10-12 weeks	Included in process design
	<b>Cross-department assignments</b> ■ Instructor workload coordinators will be able to see contact information for instructor workload coordinators outside of their department		



## **Improve Existing Structures**

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### **Evaluated three units with newly formed shared services models and recommended changes**

#### ■ **IFAS**

- Two centers – Fifield and McCarty buildings
- HR, finance and accounting, and pre- and post-award support for 14 departments (of 34 total) and one off-site research center (of 14 total located throughout the state)

#### ■ **CLAS**

- HR, finance and accounting, and pre-and post-award support for 18 out of 34 total departments

## Improve Existing Structures (Cont'd)

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### ■ Tigert Hall

- Transaction processing for the CFO office, including Finance and Accounting, Purchasing, Contracts and Grants, and Budget, as well as the Privacy Office, and University Relations administrative units
- HR and financial processing for Florida Polytechnic University (FPU), located in Lakeland, Florida
- Foreign/domestic travel and general employee reimbursements for College of the Arts

## Improve Existing Structures (Cont'd)

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### Summary of key recommendations:

IFAS	CLAS	Tigert Hall
<ul style="list-style-type: none"><li>■ Engage Deans for enhanced executive support</li><li>■ Clearly delineate scope of services (i.e., who should faculty contact and for what purpose)</li><li>■ Establish governance</li><li>■ Address employee morale</li><li>■ Initiate employee performance management plans</li><li>■ Create service levels</li><li>■ Develop change management plan</li><li>■ Evaluate and assign work left behind</li><li>■ Document processes</li></ul>	<ul style="list-style-type: none"><li>■ Design and implement system to manage and track requests (case management system)</li><li>■ Develop and implement document repository (knowledgebase)</li><li>■ Consolidate work remaining in partner unit departments (e.g., conference scheduling)</li><li>■ Establish cross-coverage</li><li>■ Retrain staff</li><li>■ Automate departmental processes</li></ul>	<ul style="list-style-type: none"><li>■ Document 32 in-scope process flows (e.g., onboarding, payroll, personnel transactions, accounts payable, grant reporting)</li><li>■ Form group to share process learnings with other service centers</li><li>■ Leverage a standard “tool-kit” to design and roll out service centers:<ul style="list-style-type: none"><li>• Scope of services</li><li>• Project plan</li><li>• Change management plan</li><li>• Service-level agreements</li><li>• FTE analysis</li></ul></li></ul>

# Identify New Opportunities

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## University Opportunity Assessment

- Administrative workload (FTE) and labor costs via survey (census)
  - Human Resources
  - Fiscal and Budgeting
  - Contracts and Grants
  - General Administrative
- Business improvements shared with unit leaders
- Opportunity to study functional areas further

## Administrative Service Delivery Models

- Work “left behind” in CLAS
- College of Education service delivery
  - Consolidated pre- and post-award
  - Established future change culture (IT, student services)
- Enrollment management shared services

## University Infrastructure

- Formal governance programs
- Stakeholders and user involvement in changes
- Tools and technologies
- Communication framework
- Hands-on training
- Reporting and metrics

## **Initiative Outcomes and Results**

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## Summary Outcomes

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1. Core Office process improvements and the monitoring and measuring of performance
2. Continuous improvement culture within existing shared services centers (IFAS, CLAS, Tigert)
3. Establishment of University and college governance committees
4. Ongoing business process improvement efforts across campus

# 1. Core Office Improvements

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- Employee personnel transactions—36 improvements, focused on reducing approvals and cycle times
  - Integrated recruiting and onboarding process
  - Built database to measure process cycle times and accuracy rates
  - Established key metrics for monitoring, measuring, and reporting performance
  - Set performance targets
  - Assigned owner

## Initiative Outcomes and Results

# 1. Core Office Improvements (Cont'd)

ePAF Type	Turnaround time <sup>1</sup> (working hours/days)			Variance between actual approval and effective dates <sup>2</sup> (days)			Recycle rate <sup>3</sup>		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
<b>Hires (Non- international)</b>	32.8/4	30/3.7	29/3.6	(4.1)	(3.7)	(3.2)	22.1%	19.9%	16.8%
<b>Hires (International)</b>	38.9/5	37/4.6	34/4.2	N/A	N/A	N/A	N/A	N/A	N/A
<b>Terminations</b>	28.2/4	24/3	22/2.7	7.7	8.4	9.9	2.4%	2.2%	1.9%
<b>Additional Pay</b>	33.3/4	30/3.7	25/3.1	(6.0)	(5.4)	(5.2)	2.8%	2.5%	2.0%
<b>Job Status Change</b>	18.7/2	17/2.1	15/1.8	(2.0)	(1.8)	(1.7)	3.9%	3.5%	3.0%
<b>Position Updates</b>	22/3	19/2.3	17/2.1	(2.1)	(1.9)	(1.8)	5.5%	5.2%	3.9%
<b>Leave Cash Out</b>	35.7/4	32/4.0	26/3.2	(13.2)	(12.9)	(13.0)	9.1%	8.2%	6.6%

<sup>1</sup> Average turnaround time from initiation through final approval.

<sup>2</sup> Average number of days ePAF approved by Level 2 after new hire effective date (excluding ePAFs that take > 1 month to approve and that are approved more than one month ahead of effective date.) Ex. – Hire ePAFs are approved an average of 3 days after new hire’s effective date; Termination ePAFs are approved an average of 8 days before employee’s effective termination date.

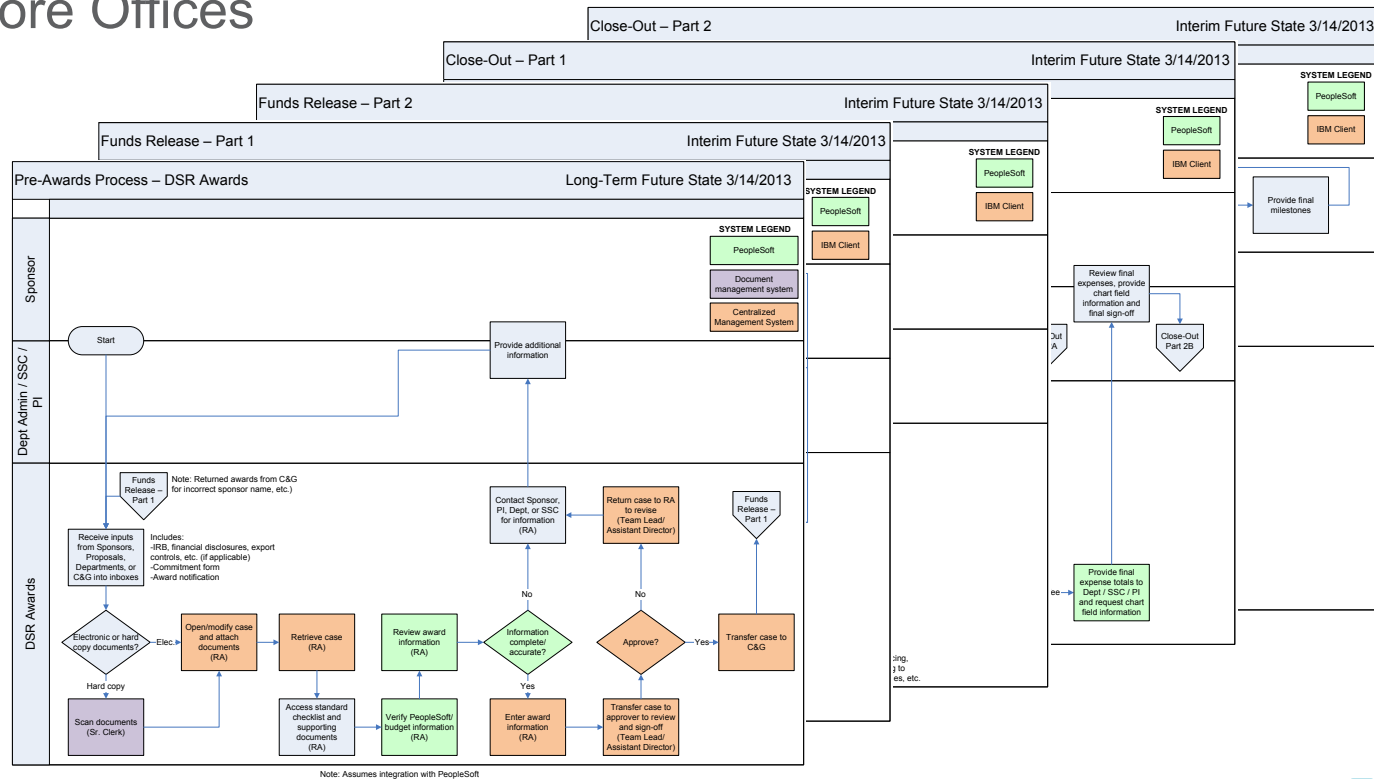
<sup>3</sup> Average percent of ePAFs recycled from initiation through final approval.



## Initiative Outcomes and Results

# 1. Core Office Improvements (Cont'd)

- End-to-end documentation for pre-award, post-award, and closeout grants processes
  - Process documentation leveraged by select college processors and by Core Offices

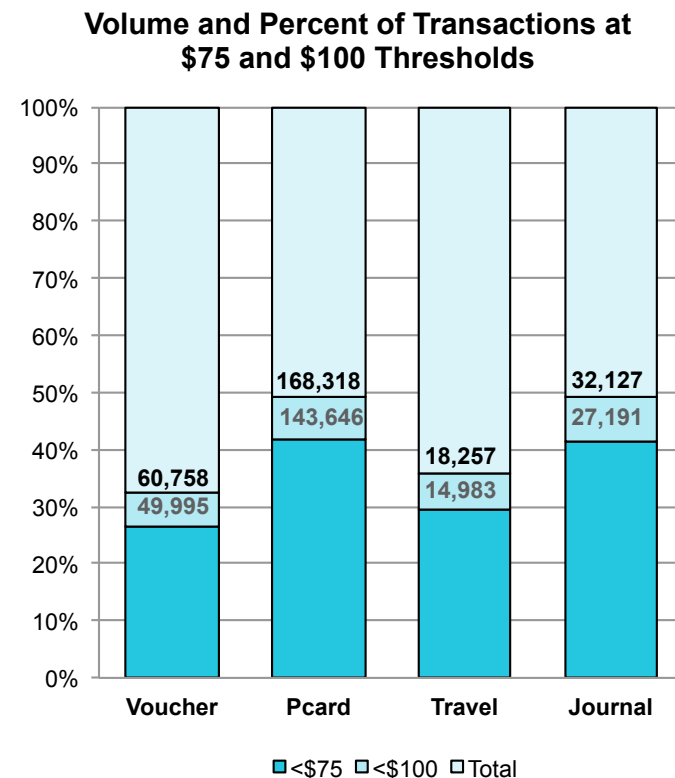


## Initiative Outcomes and Results

# 1. Core Office Improvements (Cont'd)

- Policy changes on department reconciliations aligned with leading practices
  - Clearer policy guidelines
  - Minimum dollar thresholds
  - Departmental spot checks
  - Reconfigured PeopleSoft to attach Pcard documentation at time of processing

Type	Threshold				Total
	<\$75		<\$100		
Pcard	143,646	42%	168,318	49%	343,121
Voucher	49,995	27%	60,758	32%	187,371
Travel	14,983	23%	18,257	28%	65,956
Journal	27,191	29%	32,127	35%	92,615
<b>Total</b>	<b>235,815</b>	<b>34%</b>	<b>279,460</b>	<b>41%</b>	<b>689,063</b>



By imposing a reconciliations threshold, volume of required transactions could drop as much as 41%

## Initiative Outcomes and Results

# 1. Core Office Improvements (Cont'd)

- Instructor workload system and process overhaul

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1 - GATA (nermvs.cns.ufl.edu)
File Edit Transfer Fonts Options Tools View Window Help
NERCICS WORKLOAD UPDATE SPR 2010 914 05/05/10 12:32:41 $A4W
SELECT DEPT = 1703 6R
FREEZE: Y YEAR: 2010 TERM: 1
ENTER BELOW ALL INSTRUCTORS WHO TEACH ACG 3482 C , SECTION NUMBER 3333 .
ENTER # OF CONTACT HOURS FOR EACH INSTRUCTOR
MEETING TIME NO. DAYS PERIODS BUILD ROOM BASE HEAD CNT CONTACT
2 OF 2 F 5-6 GER 010122 8.00 .00 45 1.00
INSTRUCT: S TECH1: M 2: 3: PROF= SHARED= PTYP= C
UFID INSTRUCTOR NAME CONTACT UFID INSTRUCTOR NAME CONTACT
61644741 Kirk,Marcus .99 46977800 Falloretta,Kristin .01
TOTAL CONTACT HOURS = 1.00
ENTER FOR NEXT MEETING TIME. COMPLETE PRT
  
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myufl TEST

... to this

Favorites Main Menu > Effort Reporting > Instructor Workload > Search for Course Sections

IWF Entry

Course ID: 000001 Course Offering Nbr: 1  
 Academic Institution: University of Florida  
 Term: Spring 2014 Undergrad  
 Subject Area: ABE Agricultural Engineering  
 Catalog Nbr: 2012C INTRO BIOLOGICAL ENGR  
 Academic Organization: 60070000 AG-Agricultural & Biol Eng

Class Section

Session: 1 Regular Academic Session  
 Class Section: 0923 Online Course No Professional No Self-funded No  
 Associated Class: 1 Shared

Total Contact Hours 3.000 Completed

Meeting Pattern Find | View All | First 1 of 2 | Last

Facility ID	Period(s)	Mtg Start	Mtg End	M	T	W	T	F	S	S	Start/End Date
R000027972	2	8:30AM	9:20AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01/06/2014 04/23/2014

Build Room  
ROG 0129

Contact Hours Combined Section

Instructors For Meeting Pattern Personalize | Find | View All | First 1 of 1 | Last

ID	Name	Instructor Role	Access	Contact	Empl Rcd#	Job Code
84749140	Lee, Jae Won	Prim Ins		2	0	

Save Return to Search Previous in List Next in List

## 1. Core Office Improvements (Cont'd)

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- Instructor workload system and process overhaul (cont'd)
  - Simpler, faster, easier for faculty
  - Significant time reduction for staff
  - Increased accuracy in state of Florida Board of Governor reports

Metric	2014	2015
Errors	316	16
Office University Registrar Response	5 days	Same day
Average Days to Completion	12 days	1 day

## 2. Service Improvements – IFAS

- Dean, department chair, and faculty engagement
- Monthly volume and spend reporting (following slides)
- Service-level agreements
- Website and clear memorandum of understanding
- Expanded customers
  - From 7 to 14 departments
  - Research and education center in Apopka, Florida

**IFAS Shared Service Centers**  
Vision. Commitment. Service. Solutions.

**Human Resources**

IFAS is a dynamic workplace. The professional Human Resource Team can assist you with a variety of HR topics and issues to help you recruit, manage, and retain the highest caliber staff.

- View Forms and Guides
- View Human Resource Contacts

**Grant Services**

The experts in Grants Services assist with the resources and knowledge needed to compete for, manage, close or renew sponsored awards. When expertise and standardized work processes are concentrated in a single contact center, there is a greater opportunity for getting the work done right the first time. This translates to a higher level of service that ensures compliance and mitigates risk.

- View Forms and Guides
- View Grant Service Contacts

**Financial Services**

Our team of experts in Financial Services will process, review, monitor, and provide reporting on your financial transactions and budget with a constant commitment to accuracy and improvement. We provide a number of services centered on your transactional and budgetary needs.

- View Forms and Guides
- View Financial Contacts

## 2. Service Improvements – IFAS (Cont'd)

The following slides contain examples of unit-level reporting to the IFAS governance board.

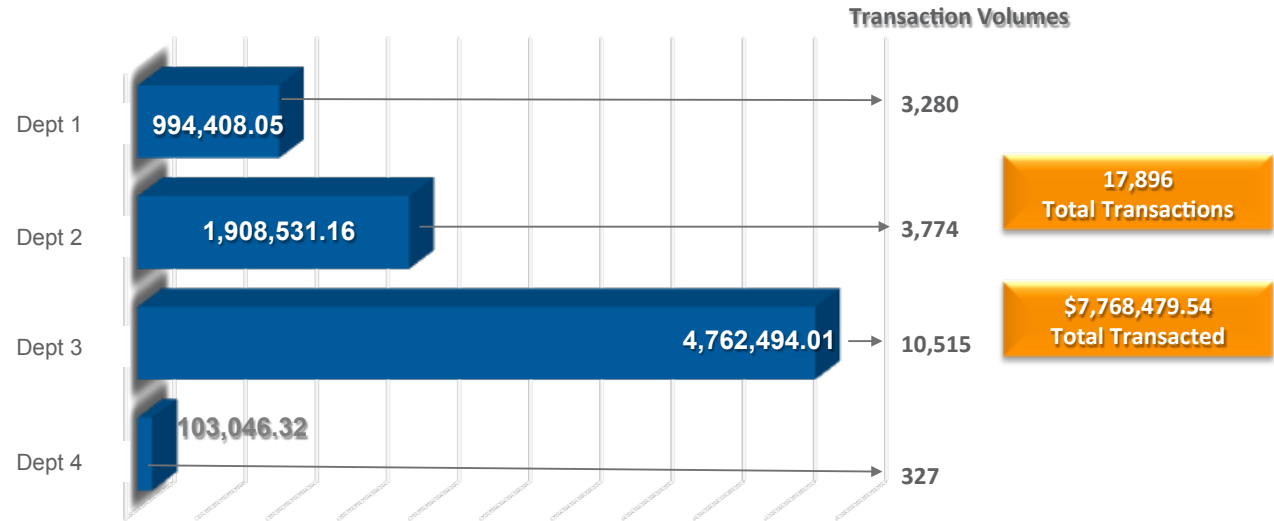
<b>IFAS Shared Services Centers Fiscal Year 2013–2014</b>		
<b>Total Number of Transactions</b>		
<b>Fifield</b>		<b>McCarty</b>
<b>17,896</b>	<b>+</b>	<b>15,854</b>
<b>33,750</b>		
<b>Total \$ Amount Transacted</b>		
<b>Fifield</b>		<b>McCarty</b>
<b>\$7,768,479</b>	<b>+</b>	<b>\$10,276,564</b>
<b>\$18,045,043</b>		

Note: Transactional volumes do not include responding to questions, resolving issues, liaising with Core Office functions, or other special projects.

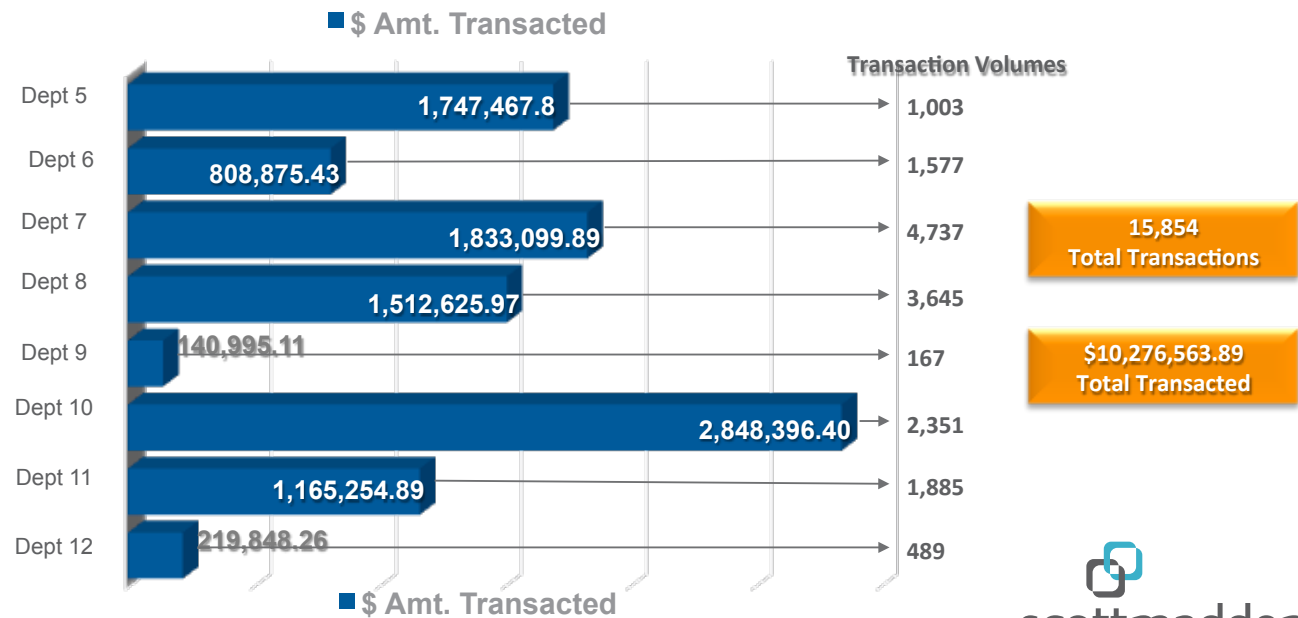
Initiative Outcomes and Results

# 2. Service Improvements – IFAS (Cont'd)

**Fiscal Transactions by Department: Fifiel**



**Fiscal Transactions by Department: McCarty**



## 2. Service Improvements – CLAS

### Clear benefits from improved service delivery.

Pre-Transition	Post-Transition
Faculty had limited or no administrative grant support	<ul style="list-style-type: none"><li>■ Readily available account balances to process timely expenditures</li><li>■ Accurate budget projections and fund expenditures</li><li>■ Pre-award support facilitates grant submissions</li></ul>
Productivity lagging and slow turnaround times	<ul style="list-style-type: none"><li>■ Service center employees handle 24% more transactions per employee</li><li>■ The service center handles 66% more expenditure dollars (vouchers, reimbursements, etc.)</li></ul>
High error rates in transaction processing, resulting in rework and delays to customers	<ul style="list-style-type: none"><li>■ Nearly two times more HR transactional errors are reported for units not served by the service center</li><li>■ The service center reports doing significantly more journal transactions ONCE and RIGHT the first time than those units that did not implement the service center model</li></ul>
Inefficiencies as a result of highly fragmented, non-concentrated work occurring on a sporadic basis	<ul style="list-style-type: none"><li>■ Cost per transaction handled in the service center is \$6.40 per transaction less than transactions handled by non-service center employees</li></ul>



## 2. Service Improvements – Tigert Hall

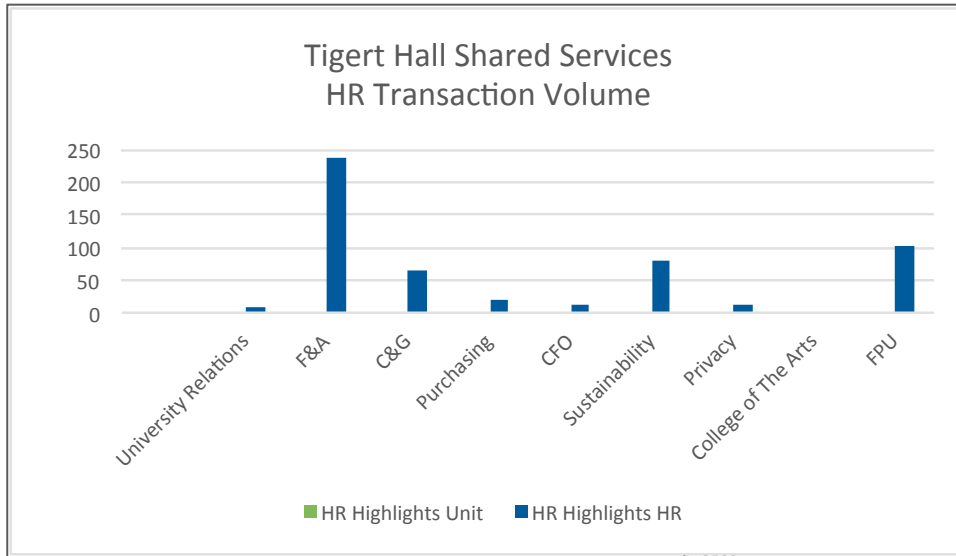
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**Since inception, the shared services center operating out of Tigert Hall has continued to:**

- Expand customer base and scope of services
  - College of the Arts
  - FPU
- Provide hands-on training for partner units (e.g., FPU)
- Reduce cycle times and errors
- Provide limited backup support for campus units
- Serve as information resource for campus
- Provide career advancement opportunities for center employees

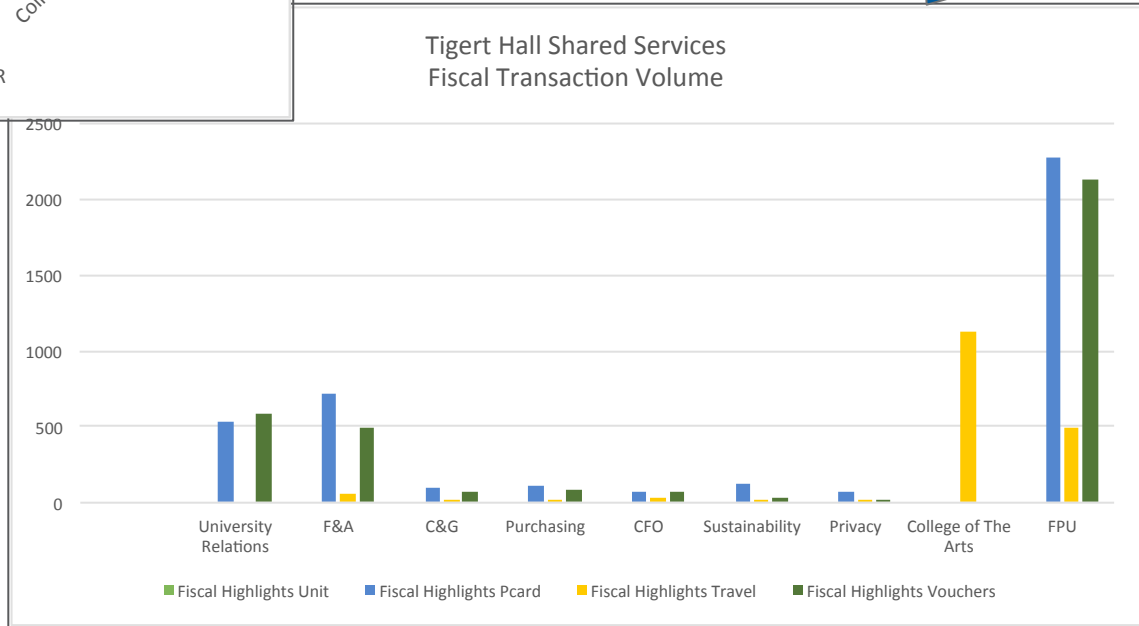
## Initiative Outcomes and Results

# 2. Service Improvements – Tigert Hall (Cont'd)

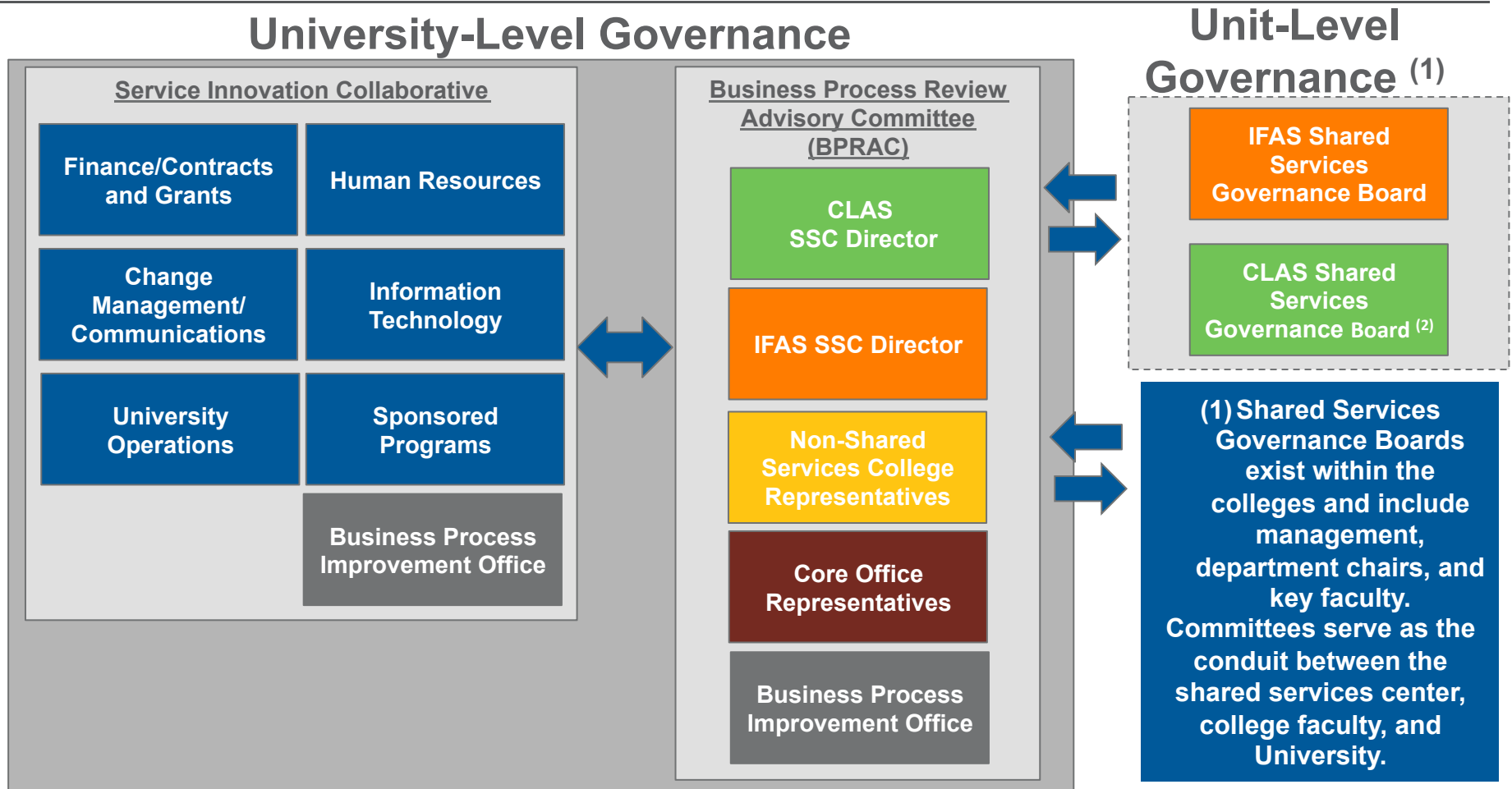


*“I call the Tigert Hall SSC if I need help with policies and directives. They help me with everything!” – Florida Polytechnic University*

*“Travel reimbursements used to take 2 weeks – now it takes only 4 days!” – College of The Arts*



### 3. Established Governance Boards



Governance structure facilitates communication within and across Core Office functions as well as between Core Offices and colleges. Unit-level governance committees serve as the conduit between the shared services center, college faculty, and University.

### 3. Established Governance Boards (Cont'd)

## University-Level Governance Board: Business Process Review Advisory Committee (BPRAC)

Purpose	Roles	Membership
<p>BPRAC serves in an advisory capacity to the University’s Vice President and CFO, providing governance over the CFO’s business process improvement initiatives and the work effort of the CFO’s Business Process Improvement office. The primary focus areas for these process improvement initiatives are University administrative leading practice activities.</p>	<p>BPRAC will assist in:</p> <ul style="list-style-type: none"><li>■ Identifying problematic business processes perceived to be inefficient, ineffective, or unnecessary</li><li>■ Prioritizing business process improvement initiatives</li><li>■ Leading the development of University “best practices”</li></ul>	<p>The committee will consist of a broad cross-section of University representatives involved in administrative activities from colleges, departments, and core administrative offices.</p>

### 3. Established Governance Boards (Cont'd)

## University-Level Governance Board: Business Process Improvement (BPI) Office

Purpose	Roles
<p>The BPI Office will:</p> <ul style="list-style-type: none"><li>■ Analyze administrative processes to achieve effectiveness and efficiency in day-to-day operations</li><li>■ Create a service-focused organization for faculty, staff, and students</li><li>■ Align Core Offices and campus units more closely together—develop processes which meet the needs of both</li><li>■ Manage risk based on a balanced risk/benefit approach</li><li>■ Leverage technology</li></ul>	<p>The BPI Office will:</p> <ul style="list-style-type: none"><li>■ Perform reviews of the University’s business processes</li><li>■ Recommend process changes and improvements</li><li>■ Coordinate process improvement initiatives</li><li>■ Conduct project success reviews</li><li>■ Consult with college and department administrative units to:<ul style="list-style-type: none"><li>• Analyze departmental procedures</li><li>• Evaluate workloads and staffing levels</li><li>• Identify potential opportunities for improvements and efficiencies</li><li>• Coordinate departmental support visits</li><li>• Serve as liaison between CFO units and campus units</li></ul></li></ul>



- Preeminence and UF Rising
- Service Innovation**
- Business Affairs
- Chief Financial Officer
- Division of Sponsored Programs
- Human Resource Services
- UF Information Technology
- UF Online
- Machen Florida Opportunity Scholarship
- Innovation Academy
- Sustainability
- “What is the Good Life?” General Education Course

## Service Innovation

### Mission Statement

Service Innovation Collaborative: Working together to identify and implement innovative, easy-to-use improvements to administrative services to more effectively support UF faculty and staff.



### The University of Florida Service

Innovation Collaborative is focused on improving communication, coordination, and alignment among vice presidential areas working on projects that improve administrative services. Board meetings are opportunities to ask:

- In addition to keeping one another informed, are we able to help one another “get the word out”? What communication vehicles might be helpful to use? Are there shared messages across projects?
- Does one project impact another? Are there issues related to timing or touch points across areas that might be advantageous to consider?
- Are we able to build on one another’s successes to help improve campus awareness and readiness? Can our messaging or branding efforts reinforce “service innovation” to enhance change management efforts? What other opportunities exist?

### The Service Innovation Collaborative includes:

- Elias Eldayrie, Vice President and Chief Information Officer
- Zina Evans, Vice President for Enrollment Management
- Margaret Fields, Associate Dean, College of Liberal Arts and Sciences (vice chair)
- Paula Fussell, Vice President for Human Resource Services
- Jodi Gentry, Assistant Vice President for Human Resource Services (chair)
- Glenn Good, Dean, College of Education
- Laura Huntley, Associate Vice President, Health Affairs
- Joe Joyce, Senior Associate Vice President for Agriculture and Natural Resources
- Charlie Lane, Senior Vice President and Chief Operating Officer
- Mike McKee, Interim Vice President and Chief Financial Officer
- David Norton, Vice President for Research
- Curtis Reynolds, Vice President for Business Affairs

## 4. Continuous Improvement Efforts

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### Key Accomplishments of BPI Office:

- Organizational Structure Evaluation
  - College of Education – Lastinger Center
  - UF Career Resource Center
- Shared Services Design and Implementation
  - College of Pharmacy
- Cherwell Case Management System
  - Design and Implementation – October 2015
- Training Class Redesign
  - Reporting classes for end users
- Bridge Staffing
  - UF Health Cancer Center
- E-mail Approval Process
  - Convert paper forms to automated approvals

## 4. Continuous Improvement Efforts (Cont'd)

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### Key Accomplishments of BPI Office (Cont'd)

#### ■ Transaction Data Analytics

- IFAS Research Centers
- College of Public Health and Health Professions
- College of Health and Human Performance

#### ■ Recruiting and Staffing Search Committee

- College of Pharmacy – Coordinator, Research Services
- Lastinger Center – Finance Manager

#### ■ Reporting Services

- Services campus colleges and departments



- 152 completed requests
- 42 reports in the queue at various stages
- 109 individual customers across 45 units
- 5 minutes to 34 hours to complete requests
- 67 requests completed same day received
- 51 requests completed in 1–5 days



## 4. Continuous Improvement Efforts (Cont'd)

### ■ Reporting Services (Cont'd)

#### Customer Time Savings/Month:

- College of Pharmacy – 32 hours
- George A. Smathers Libraries – 8 hours
- Pathology – 4 hours

*"This is exactly what I needed, thank you so much. This will be very helpful in managing these funds."*

*"...thanks for the revamped payroll pay list report. Yesterday's download cut my time in half."* Business Manager, University of Florida Graduate School

*"Wow, what customer service. This is exactly what I was looking for. I am really impressed with the customer service, as well as the results!"* Assoc. Chair, Food and Resource Economics

*"This is fantastic! This has saved hours of tedious and repetitive work. I would say over the last few weeks I have saved at least half a workday over the previous method of lookup."*

Department of Pathology



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Service Innovation

Preeminence and UF Rising

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○ Division of Sponsored Programs

○ Human Resource Services

○ UF Information Technology

UF Online

Machen Florida Opportunity Scholarship

Innovation Academy

Sustainability

“What is the Good Life?”  
General Education Course

## Service Innovation



List of Related Projects (Underway, Recently Completed, or Pending):

- Shared Services — research centers and other interested Colleges/Units
- Other department work (outside of HR/FI/IT) that could be centralized
- UFIRST
- MyInvestiGator II
- BenAdmin
- Online Promotion and Tenure
- MyTraining – Training Management System
- Immigration/Foreign Nationals – Hiring and Visa streamlining
- On Target Classification Project
- Student Services System (S3) Project
- ePAF recommendations (from Scott Madden's group)
- Department reconciliation
- Onboarding
- Deboarding
- UF Online admin support
- Instructor Workload File – now called Academic Activity Report
- ITSM – Case Management System
- Electronic Data Management
- Web Content Management



- Preeminence and UF Rising
- Service Innovation
  - Business Affairs
  - Chief Financial Officer**
  - Division of Sponsored Programs
  - Human Resource Services
  - UF Information Technology
- UF Online
- Machen Florida Opportunity Scholarship
- Innovation Academy
- Sustainability
- "What is the Good Life?" General Education Course

## Chief Financial Officer

### PrintSmart

Designed to improve your office's efficiency while saving your department money, PrintSmart helps departments save money on scanning, faxing, printing and copying by identifying the "best fit" for your department under a new contract with Xerox. As UF copier leases expire, units will replace their MFDs with Xerox equipment covered under the new contract. Research at other universities has demonstrated that the use of MFDs provides significant savings and increased efficiency.



### myPayment Solutions

In an effort to streamline, digitize and automate the processing of invoices and vouchering, the Office of the CFO and UF Disbursements have introduced a new Accounts Payable solution—myUF Payment Solutions. myUF Payment Solutions provides a new supplier portal in myUFL that enables electronic vouchers to flow directly from vendors to UF Disbursements, eliminating extra steps and reducing paper in the process.



### Reporting Services

Designed for administrative staff in colleges and departments—including business administrators, fiscal staff, HR staff, and post-award research administration staff—Reporting Services is designed to provide reporting support to colleges and departments so units can effectively manage their business operations. This service is designed to help administrative staff understand their data and reporting needs, help staff build reports to meet their needs, and promote existing training classes and tools developed by Training and Organizational Development. This service provides reporting subject matter experts for monthly financial reports, prompted reports, FIT cubes, HR cubes, PeopleSoft queries, Query Studio, and myInvestiGator.

### Business Process Review Advisory Committee

The BPRA Committee serves in an advisory capacity to the University's Vice President and Chief Financial Officer providing governance over the CFO's business process improvement initiatives and the work effort of the CFO's Business Process Improvement office. The BPRA Committee will assist with identifying problematic business processes perceived to be inefficient, ineffective, or unnecessary; prioritize business process improvement initiatives; and lead the development of university "Best Practices."

**Lessons Learned**

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## *Lessons Learned*

# In Summary....Top 10 Lessons Learned

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1. The Core Offices should continue to break down silos across functions (e.g., CFO, IT, DSR, HR, etc.) and work to strengthen partnerships and improve responsiveness to one another; projects that cross organizational boundaries or are dependent upon external support (e.g., IT) require more time investment up front in order to maximize project success.
2. It is not enough to stand up a governance board and set a meeting schedule; the Board should be used to fulfill the original purpose of evaluating needs, setting direction, and monitoring performance against direction.
  - The Governance Board should set the standards and hold process owners accountable for delivering on those standards (e.g., execute the process owner framework).
3. A strategic plan must be in place and routinely followed with a structured, deliberate approach in order to achieve the University's long-term vision for business process improvement.
4. Executive sponsorship must remain strong, both within the Core Office and the colleges where shared services currently exist (IFAS, CLAS); without sponsorship, the long-term vision cannot be achieved.
5. Understanding resource capacity and building in realistic expectations of resource constraints help minimize the negative impact to project schedules and outcomes.

## *Lessons Learned*

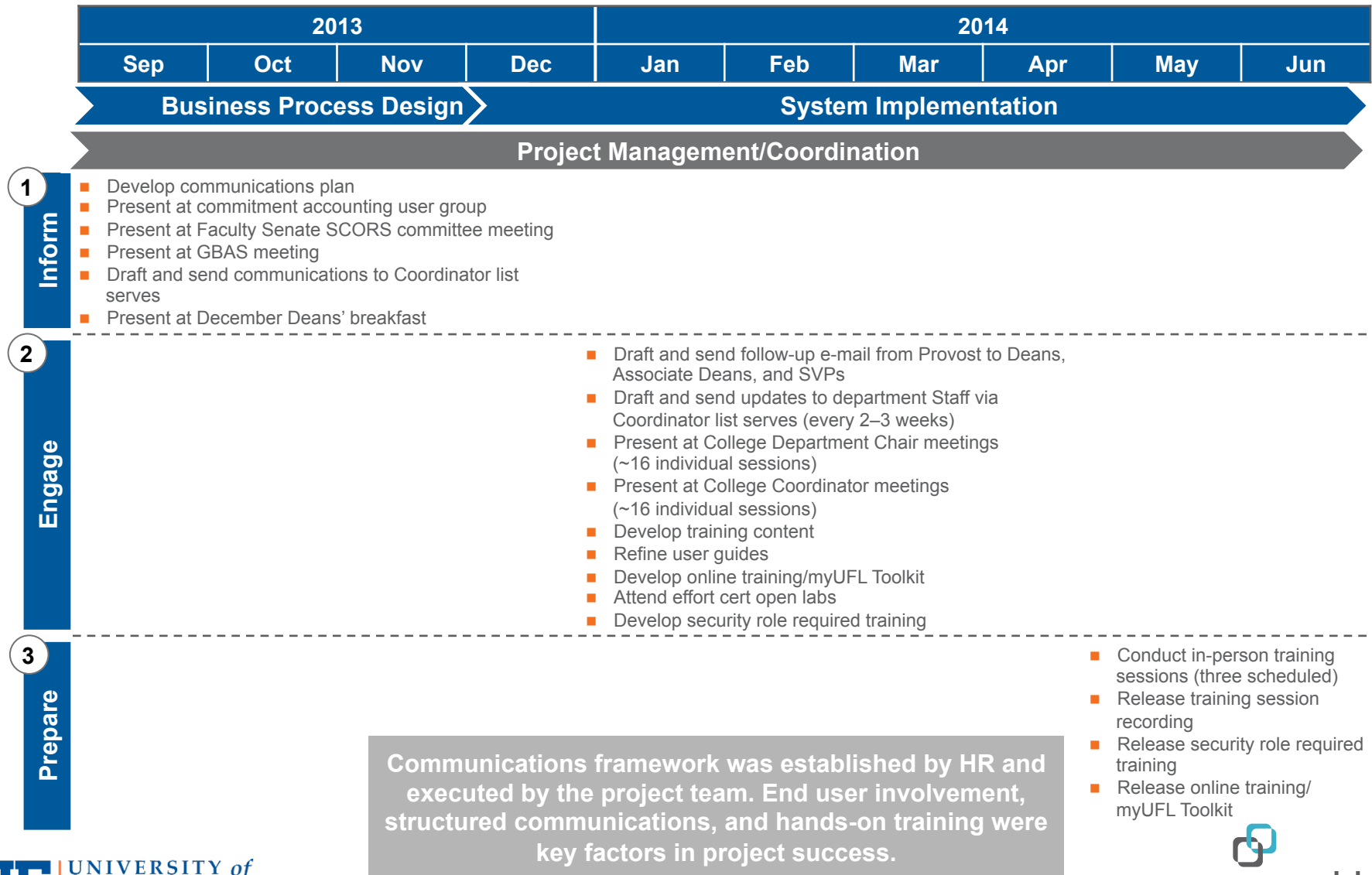
# In Summary....Top 10 Lessons Learned (Cont'd)

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6. Implementing business process improvements should follow a structured approach that incorporates basic project management principles, including assigning a project manager, setting clear roles and responsibilities, tracking progress, reporting on results, and setting up an ongoing process ownership structure.
7. Subject matter experts should continue to be heavily involved in identifying process improvement areas, developing recommended solutions, and participating in ongoing discussions to ensure changes are effectively adopted and executed (e.g., instructor workload success).
8. Shared services must adopt a continuous improvement mentality and be willing to move forward with critical infrastructure components, such as process documentation, case management system, and knowledgebase.
9. Using an FTE sample workload survey and extrapolating results to a campus-wide population are complex and challenging and require a large number of assumptions to complete the analysis.
10. Training and communication continue to arise as gaps across the campus; subject matter experts should be engaged in developing a framework that works in a decentralized higher education environment. Framework should be put into place, tested for effectiveness, and revised as necessary (see following slide for example).

## Lessons Learned

# Example – Effective Communications Framework



## Ongoing Challenges

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- Refreshed strategic plan—focused implementation
- Leadership and sponsorship at the governance level
  - Structured, unified approach to address business process recommendations
  - Standardization across transaction processing
  - Training and communication
- Metrics and reporting
  - System infrastructure
  - Accountability for measuring performance and addressing gaps
- Shared services center reputational hurdles
- Resource constraints



**Wrap-Up**

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## Conclusions

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- Higher education institutions have a lot of opportunity for improvement; however, culture and change readiness factors are key to determining the best approach
- Gain alignment on key drivers for change and communicate accordingly (e.g., service improvement, cost, or compliance)
- Frequent stakeholder and customer involvement is critical to success—change management cannot be underestimated
- An evolutionary approach can work as long as the structure is deliberate, accountability is assigned, and participants are persistent
- Promote Core Office support, not control; change is a two-way street

# Contact Us

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**Smart. Focused. Done Right.**



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