



Organizational Excellence Forum

Wednesday, June 8, 2016

AGENDA

- Transforming Administration Program Update
- Cultivating a Culture of Service
- Organizational Roadmap

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TRANSFORMING ADMINISTRATION PROGRAM

<https://tap.uw.edu>



UW Strategy 2016 Sustainable Academic Business Plan

<http://www.washington.edu/strategicplanning/>

What is our essential core?

OUR MISSION

Preserve, advance and disseminate knowledge through research, education & service

OUR PROMISE

Together undaunted for a world of good — leading-edge student experience, public as a philosophy, proven impact and innovation mindset.

What will the future look like?

THE UW OF THE 21ST CENTURY

More competitive, collaborative, technology-adept, nimble and diversified. Committed to strategic priorities of maintaining quality, staying true to our mission and providing solutions to society's most pressing issues.

How do we get there from here?

SUSTAINABLE ACADEMIC BUSINESS PLAN

Purpose: Align activities with strategic priorities

Financial Realities

- Uncertain state and federal funding
- Need to diversify revenue streams

Increased Competition

- For the best students and faculty
- For affordable, quality higher education
- From traditional, international and for-profit institutions

21st Century Trends

- Ubiquitous Technology
- Changing Expectations
- Shifting Demographics

SUSTAIN

COMPETE

TRANSFORM

Decrease Costs

Increase Revenues

Invest in People

Invest in Infrastructure

Increase Access

What are our long-term goals?

What are our near-term goals?

Existing efforts like those described in briefs, Provost reports, etc.

What are we doing well?

What more can we do?

KEY INITIATIVES

Husky Experience

Fostering Collaboration

Teaching & Learning

Transforming Administration Program (OE)

Innovation Agenda

Institutional Assessment

Race & Equity

Community Engagement

What is TAP?

- The Transforming Administration Program launched nearly one year ago by President Cauce and Provost Baldasty with a goal of **enhancing the culture of service in UW's central administrative units.**
- A 2015 campus survey, along with feedback from UW leadership, administrative teams and academic units, was used to guide TAP projects.
- Since initial launch, 35 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, TAP focus shifted to “Big 3” areas of strategic focus in the next year. Remaining TAP projects will continue to be tracked by Organizational Excellence (OE)

What does 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

The “Big 3”

- Systems
 - HR/Payroll
 - Finance modernization (to be added in July)
- Structure
 - Central administration
 - Executive office
- Accountability
 - Organizational assessment and service delivery

TAP SCORECARD

<https://tap.uw.edu/projects/tap>

TAP Improve Service Delivery									
Project 	Sponsor / Team Lead	OE Support	Project Size	Priority	Next Milestone Check-in	Project Type	Project Status	Status details	Last Updated
ABB (Phase 2) edit	Sarah Hall		medium	low	05/2016	Streamline Admin Services	On Track	The ABB Phase 2 Committee convened and scope of work was established. Subcommittees are now examining options. Report draft due early June.	05/06
Administrative Unit - Customer Satisfaction Surveys edit	Ruth Johnston	Tyler DuLam	medium	medium	06/2016	Assessment	On Track	The workgroup will continue planning with the goal of survey deployment in winter. Workgroup membership may change slightly as a new phase of work begins.	06/02
Attorney General Billing Approval Process edit	Karin Nyrop	Tyler DuLam	medium	medium	05/2016	Business Process Development	Not Started	Not started.	05/09
CPO/FS Cost Reduction and Service Improvement for Remodels, Design, Construction edit	Charles Kennedy, Mike McCormick		medium	high	05/2016		On Track	Data analysis underway; information is providing opportunities to evaluate options, lessons learned, and new ideas to consider regarding cost reduction and service improvements.	04/07
Create Administrative Financial Portal edit	Cheryl DeBoise		small	low	06/2016	Service Delivery	On Track	Team is working on a draft finance policy inventory, key financial definitions, identification and review of existing resources and potential web search enhancements. The team will be meeting with the Financial Leadership	06/02



BUILDING A CULTURE OF SERVICE



CULTURE OF SERVICE – CONTEXT

- The Key Goal of TAP is simple —
....to enhance the culture of service in UW's central administration units.
- Administrative Units are those which report to a Vice President, Vice Provost, or Chancellor
- However, some of the Deans want to do this in their Dean's Offices too
- Thus, today...you have several hats:
 - **Learn about Culture of Service generally**
 - **As a customer, identify what needs to improve**
 - **Become a Culture of Service advocate in your unit**

WHY A CULTURE OF SERVICE?

2015 TAP SURVEY RESULTS: CENTRAL ADMINISTRATION'S CUSTOMERS IDENTIFIED SEVERAL AREAS THAT NEEDED IMPROVEMENT

- Responsiveness
- Knowledge/Understanding
- Customer Service Focus
- Consistency
- Accessibility

BUILDING A CULTURE OF SERVICE

A CULTURE OF SERVICE IS A SHARED PURPOSE WHERE EVERYONE IS FOCUSED ON DELIVERING VALUE FOR OTHERS INSIDE AND OUTSIDE THEIR ORGANIZATION AND ACROSS THE UNIVERSITY

- > Understand customers' needs
- > Follow service standards
- > Everyone is responsible for customer's experience

Staff have tools to identify and solve operational issues

Staff work across units and departments to streamline and eliminate bureaucracy

Customer Service

- > Engaged and supportive leadership
- > Clear performance measures based on service standards

Operational Effectiveness

Employee Satisfaction

TABLE ACTIVITY

CUSTOMER STORIES: THE GOOD, THE BAD AND THE UGLY

Each table has been provided a card with either + for **positive**, - for **not so positive**, and -/+ for **mixed**

Depending on your card, share examples with your tablemates of where you have had a good, bad, or a mixed customer experience with Central Administration

- What happened?
- Why was it a positive or negative experience?
- What could have happened differently?

WHY STANDARDS?

DEVELOPED TO CREATE A COMMON SYSTEM OF VALUES AND PRACTICES THAT REINFORCE THE IDEA THAT PROVIDING EFFECTIVE AND EFFICIENT SERVICE IS A CENTRAL ADMINISTRATION PRIORITY

- Communicate Values
- Foster Partnering
- Measure Results
- Identify Issues

SERVICE STANDARDS EXAMPLES

EMAIL

- Acknowledge email within 2 business days
- Use uw.edu email address
- Standard unit out of office message
- Standard signature with UW brand standards

PHONE AND VOICEMAIL

- Respond to voicemails within 2 hours for frontline services, 2 days for internal support
- Standard unit phone greeting
- Standard unit out of office voicemail message

SERVICE STANDARDS EXAMPLES

WEB SITES AND COMMUNICATIONS

- Department and unit websites follow UW standard website templates
- Content includes service commitments and/or service level partnerships

CALENDAR

- MS Outlook is the designated calendar system
- Most staff have open calendar
- Default permissions levels set to “free/busy time, subject, location”

BUILDING A CULTURE OF SERVICE

DRAFT ROLL-OUT TIMELINE FOR BUILDING A CULTURE OF SERVICE

Activity		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Ongoing
Planning	<ul style="list-style-type: none"> Operationalize Service Standards Document <ul style="list-style-type: none"> Standards, Service Commitments, Guidelines, Best Practices, etc. Integrate feedback Develop standard definitions, models for key terms and concepts 	■								
Training & Development	<ul style="list-style-type: none"> Hire training expertise Develop training strategy and plan Develop training materials – self-help guides, training curriculum and other formats Integrate appropriate process and operational improvement tools and templates, e.g., online Select/create training scheduling tool(s) Launch formal training 		★	■	■	■	■	■	■	■
Communication & Roll-out	<ul style="list-style-type: none"> Develop communication and roll-out plan <ul style="list-style-type: none"> Campus/Central Admin Leadership Unit Leadership Individual unit staff Identify Service Standard Unit Partners Create roll-out/intro communication material – why, what, how: Format and plan for status and progress communication – content and audience 	■	■	■	■	■	■	■	■	■
Dept./Unit	<ul style="list-style-type: none"> Leadership onboarding – ensure understanding and commitment Work with Unit Partners to determine individual unit plans and resource requirements (self sustaining, moderate or in-depth help) Determine type of launch - soft launch, big bang or combination Regular status and check-in sessions Adjust plan and intervene as appropriate 		■	■	■	■	■	■	■	■
Evaluation	<ul style="list-style-type: none"> Baseline Customer Satisfaction Survey <ul style="list-style-type: none"> Launch Admin Unit Customer Survey (TAP) to assess service standards Integration plan with any existing POS or other survey/feedback methods Determine survey schedule 								★	■

CASE STUDIES

SESSION 1

A The New Job

B Seeing Red

C Demonstrating a Culture of Service

D The Org Chart

SESSION 2

E Just a Quick Question

F Office Overload

G Service Standards

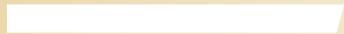
H The Handbook

CASE STUDY QUESTIONS

1. Who is/are the customer(s) represented in this case?
2. How was good or poor service demonstrated?
What will be the impact?
3. Using the Culture of Service Triangle, what went right or wrong in each of the areas of **Customer Service**, **Employee Satisfaction**, and **Operational Effectiveness**?
4. What would happen differently in a Culture of Service environment?



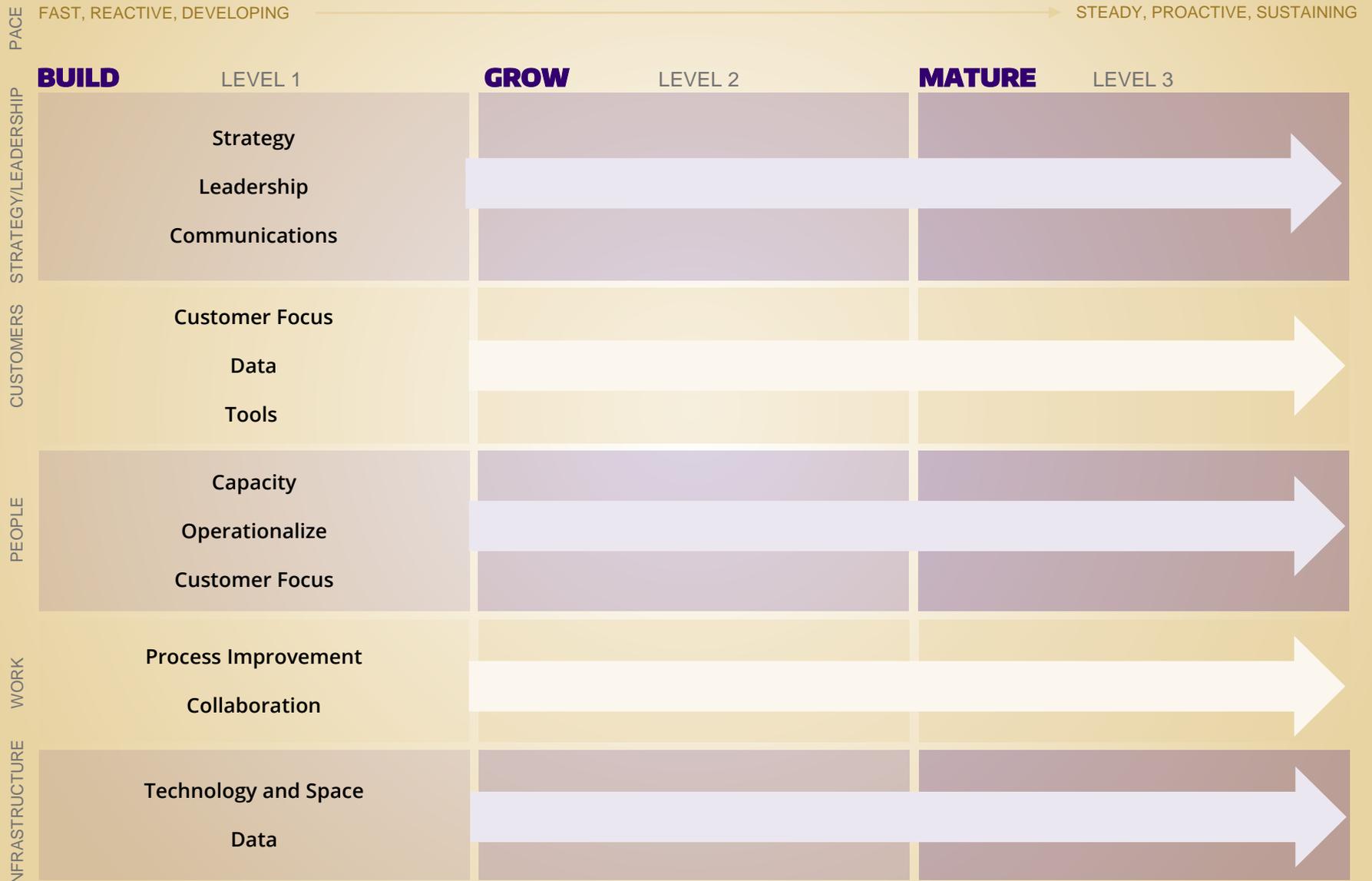
ORGANIZATIONAL ROADMAP



ORGANIZATIONAL ROADMAP

- Tool we are developing to help leaders focus and build their organizations
- Feedback welcome
- OE has services to help

ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION



ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION/UNIT/PROGRAMS/TEAMS

PACE

FAST, REACTIVE, DEVELOPING

STEADY, PROACTIVE, SUSTAINING

STRATEGY/LEADERSHIP

BUILD

LEVEL 1

GROW

LEVEL 2

MATURE

LEVEL 3

Strategy

- Develop mission, vision, values - engage staff at all levels
- Set strategic objectives and goals
- Create budget tied to strategic plan
- Identify benchmarking and ongoing data collection to track/evaluate success and strategic alignment
- Understand and mitigate risk

Leadership

- Develop and articulate leadership standards
- Develop leadership roles and responsibilities
- Hold frequent meetings to refine strategy; get to know staff and their abilities/backgrounds

Communications

- Develop and implement internal/external communications plan

Strategy

- Revisit mission, vision, values to update based on first year; conduct strategic planning for individual units
- Update budget to reflect changes in strategy and plan
- Develop data dashboard to track and review organizational performance aligned with strategy
- Understand and mitigate risk

Leadership

- Incorporate leadership standards into performance management, employee development plans, and culture (meetings, etc.)
- Identify and implement leadership development

Communications

- Refine, improve, and standardize communications approach so people know what to expect and where to go for information

Strategy

- Evaluate and iterate mission, vision, values
- Update and focus strategy and plans for units
- Work on longer-term budget and plan with a focus on sustainability
- Understand and mitigate risk
- Continuously assess risk and compliance issues

Leadership

- Create new development opportunities for leaders
- Develop succession plan for leaders

Communication

- Proactively seek input on what people need to know and how to find information

CUSTOMERS

Customer Focus

- Define customers and services and create stakeholder map
- Build relationships with customers
- Create customer service standards

Data

- Implement process for customer feedback (surveys, focus groups, etc.)

Tools

- Develop website and customer communication tools

Customer Focus

- Build and maintain customer relationships
- Improve understanding of customer needs

Data

- Incorporate customer feedback into Service Level Agreements and establish performance metrics

Tools

- Reevaluate website for user satisfaction

Customer Focus

- Develop Customer Relationship Management (CRM) plan

Data

- Use customer feedback for planning/forecasting
- Use customer feedback in Continuous Process Improvement

Tools

- Change/update website and communication tools (as needed)

PEOPLE

Capacity

- Identify positions/skills needed and performance standards
- Develop and execute against hiring timeline

Operationalize

- Build participatory culture (create working teams, seek collaboration opportunities with other departments)
- Establish norms (meetings, scheduling, decision-making)
- Establish onboarding process
- Establish recognition program
- Create and implement internal communication structure

Customer Focus

- Train on service standards

Capacity

- Implement employee development program (including coaching)
- Develop new employee opportunities (project leads, etc.)

Operationalize

- Assess employee performance, engagement, and areas for improvement
- Evaluate/expand recognition program

Customer Focus

- Promote a culture of service (integrate with employee development plans, performance management)
- Assess service and identify areas for improvement

Capacity

- Assess and practice continuous improvement
 - Provide mentoring
 - Improve team-based practices and competency
 - Enhance team expertise (training, etc.)

Operationalize

- Practice continuous improvement
- Develop and implement employee retention and succession plan

Customer Focus

- Implement continuous improvement

WORK

Establish and Identify Processes

- Identify and establish current state:
 - Roles and responsibilities
 - Processes and procedures
 - Operational performance measures
- Meeting cadence, format/type (1:1, group, retreat), timing and audience/attendees
- Workflows, resources assignments, and capacity
- Understand documented/undocumented organizational knowledge
- Establish overall understanding, methodology, and adherence to documented processes and procedures
- Begin tracking and build awareness for incidents and errors
- Benchmark and learn best practices from peers/industry

Continuous Process Improvement

- Develop framework for staff to identify and communicate issues and errors
- Ensure work is standardized, reduce variability within unit
- Establish basic measures and begin tracking and performing analysis
- Work toward eliminating paper-based manual processes
- Build visibility into workflow - for both internal staff and customers (as appropriate)
- Prioritize work and effort based on alignment with strategic priorities
- Benchmark and learn best practices from peers/industry
- Evaluate progress and modify approach to achieve desired results

Continuous Process Improvement

- Proactively address issues with robust performance analysis
- Track and report incident or error resolution
- Create cross functional process standardization and process improvement
- Eliminate redundant or misaligned efforts
- Establish clear roles, responsibilities and accountabilities
- Benchmark and learn best practices from peers/industry

INFRASTRUCTURE

Technology and Space

- Identify space needs to support organization
- Identify technology and tools needed
- Determine website for internal and external communication
- Determine systems to use

Data

- Create data and tracking processes
- Establish policies and procedures

Technology and Space

- Align space and technology
- Ensure collaboration systems are in place
- Provide tools and resources for positions and teams

Data

- Prepare and use metrics and reports for decision-making
- Implement data management governance and policies

Technology and Space

- Integrate systems internally and externally
- Automate systems to support workflow
- Plan for capital or equipment replacement

Data

- Share, advise, and consult with others

REVIEW AND DISCUSSION

- Individually, review the Roadmap
- Where is your organization in this?
- Talk with tablemates:
 - Discuss how you could utilize this tool
 - What category(s) is most relevant for you to address?
 - Strategy/leadership
 - Customers
 - People
 - Work
 - Infrastructure
- Report out highlights

Questions and Discussion

For more information see Organizational Excellence website or email orgexcel@uw.edu