AGENDA

• Transforming Administration Program Update
• Cultivating a Culture of Service
• Organizational Roadmap
TRANSFORMING ADMINISTRATION PROGRAM

https://tap.uw.edu
UW Strategy 2016
Sustainable Academic Business Plan

http://www.washington.edu/strategicplanning/
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
<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor / Team Lead</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Next Milestone Check-in</th>
<th>Project Type</th>
<th>Project Status</th>
<th>Status details</th>
<th>Last Updated</th>
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<tbody>
<tr>
<td>ABB (Phase 2) edit</td>
<td>Sarah Hall</td>
<td>medium</td>
<td>low</td>
<td>05/2016</td>
<td>Streamline Admin Services</td>
<td>On Track</td>
<td>The ABB Phase 2 Committee convened and scope of work was established. Subcommittees are now examining options. Report draft due early June.</td>
<td>05/06</td>
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<tr>
<td>Administrative Unit - Customer Satisfaction Surveys edit</td>
<td>Ruth Johnson</td>
<td>Tyler DULam</td>
<td>medium</td>
<td>medium</td>
<td>05/2016</td>
<td>Assessment</td>
<td>On Track</td>
<td>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.</td>
<td>05/02</td>
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<tr>
<td>Attorney General Billing Approval Process edit</td>
<td>Karin Nyrop</td>
<td>Tyler DULam</td>
<td>medium</td>
<td>medium</td>
<td>05/2016</td>
<td>Business Process Development</td>
<td>Not Started</td>
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<td>05/09</td>
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<td>CPO/FS Cost Reduction and Service Improvement for Remodels, Design, Construction edit</td>
<td>Charles Kennedy, Mike McCormick</td>
<td>medium</td>
<td>high</td>
<td>05/2016</td>
<td>On Track</td>
<td>Data analysis underway; information is providing opportunities to evaluate options, lessons learned, and new ideas to consider regarding cost reduction and service improvements.</td>
<td>04/07</td>
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<td>Create Administrative Financial Portal edit</td>
<td>Cheryl DeBoise</td>
<td>small</td>
<td>low</td>
<td>05/2016</td>
<td>Service Delivery</td>
<td>On Track</td>
<td>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</td>
<td>05/02</td>
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</table>
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

Operational Effectiveness

Employee Satisfaction

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

UNIVERSITY of WASHINGTON 12
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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
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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

<table>
<thead>
<tr>
<th>PACE</th>
<th>BUILD LEVEL 1</th>
<th>GROW LEVEL 2</th>
<th>MATURE LEVEL 3</th>
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<tbody>
<tr>
<td>FAST, REACTIVE, DEVELOPING</td>
<td>Strategy</td>
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<td>Leadership</td>
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<td>Communications</td>
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<td>CUSTOMERS</td>
<td>Customer Focus</td>
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<td>PEOPLE</td>
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<td>WORK</td>
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<td>Collaboration</td>
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<td>INFRASTRUCTURE</td>
<td>Technology and Space</td>
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<td>Data</td>
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ROADMAP FOR THE DEVELOPMENT OF AN ORGANIZATION/UNIT/PROGRAMS/TEAMS

<table>
<thead>
<tr>
<th>BUILD</th>
<th>LEVEL 1</th>
<th>GROW</th>
<th>LEVEL 2</th>
<th>MATURE</th>
<th>LEVEL 3</th>
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</thead>
</table>
| **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 | • 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 | • 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 | |
| **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 | • Incorporate leadership standards into performance management, employee development plans, and culture (meetings, etc.)  
• Identify and implement leadership development  
**Communications** | | |
| **Communications** | • Develop and implement internal/external communications plan | • Refine, improve, and standardize communications approach so people know what to expect and where to go for information | |
| **Customer Focus** | • Define customers and services and create stakeholder map  
• Build relationships with customers  
• Create customer service standards | • Build and maintain customer relationships  
• Improve understanding of customer needs  
**Data** | | |
| **Data** | • Implement process for customer feedback (surveys, focus groups, etc.) | • Incorporate customer feedback into Service Level Agreements and establish performance metrics  
**Tools** | | |
| **Tools** | • Develop website and customer communication tools | • Reevaluate website for user satisfaction | |
| **Capacity** | • Identify positions/skills needed and performance standards  
• Develop and execute against hiring timeline | • Implement employee development program (including coaching)  
• Develop new employee opportunities (project leads, etc.) | | |
| **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** | | |
| **Customer Focus** | • Train on service standards | • Promote a culture of service (integrate with employee development plans, performance management)  
• Assess service and identify areas for improvement | |
| **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 | • 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  
**Continuous Process Improvement** | |
| **Continuous Process Improvement** | | • Evaluate progress and modify approach to achieve desired results | |
| **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** | • Align space and technology  
• Ensure collaboration systems are in place  
• Provide tools and resources for positions and teams  
**Technology and Space** | | |
| **Data** | • Create data and tracking processes  
• Establish policies and procedures | • Prepare and use metrics and reports for decision-making  
• Implement data management governance and policies | |
| **Technology and Space** | | | |
| **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 | | 

**CUSTOMERS**

- Define customers and services and create stakeholder map
- Build relationships with customers
- Create customer service standards
- Implement process for customer feedback (surveys, focus groups, etc.)
- Develop website and customer communication tools

**DATA**

- Implement employee development program (including coaching)
- Develop new employee opportunities (project leads, etc.)
- Incorporate customer feedback into Service Level Agreements and establish performance metrics
- Reevaluate website for user satisfaction

**CAPACITY**

- Implement employee development program (including coaching)
- Develop new employee opportunities (project leads, etc.)
- Develop process for customer feedback (surveys, focus groups, etc.)
- Reevaluate website for user satisfaction

**OPERATIONALIZE**

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

**CONTINUOUS PROCESS IMPROVEMENT**

- 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

**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**

- 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
- Share, advise, and consult with others

**STRATEGY/LEADERSHIP**

- 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

**COMMUNICATION**

- Create new development opportunities for leaders
- Develop succession plan for leaders
- Proactively seek input on what people need to know and how to find information

**PEOPLE**

- Develop new employee opportunities (project leads, etc.)
- Ensure collaboration systems are in place
- Incorporate customer feedback into service level agreements and establish performance metrics
- Reevaluate website for user satisfaction
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