STANDING COMMITTEES

Finance and Asset Management Committee

Transforming Administration Program Update

INFORMATION ITEM

This item is for information only.

BACKGROUND

In 2014-15, the Board of Regents established a standing agenda item to highlight administrative efficiency efforts at the University of Washington. This standing item is now be presented within the context of Transforming Administration Program (TAP).

The Transforming Administration Program (TAP) is a key initiative in the Office of the President and Office of the Provost. The overarching mission of TAP is to transform UW administration into an enhanced culture of service. TAP encompasses all central administrative units (those led by Vice Presidents and Vice Provosts).

TAP executive sponsors have developed the attached presentation as part of a regular update to the Regents about the program.

Attachment
Transforming Administration Program
TRANSFORMING ADMINISTRATION PROGRAM

Board of Regents, January 14, 2016
https://tap.uw.edu
UW STRATEGY 2015 – 2016

Sustainable Academic Business Plan

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.

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.

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
• Decrease Costs

COMPETE
• Increase Revenues
• Invest in People

TRANSFORM
• Invest in Infrastructure
• Increase Access

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

KEY INITIATIVES

- Husky Experience
- Featuring Collaboration
- Teaching & Learning
- Transforming Administration Program (OE)
- Innovation Agenda
- Institutional Assessment
- Race & Equity
- Community Engagement
Shared Governance

- Mary Lidstrom, Chair, Office of Research
- Denzil Suite, Student Life
- Judy Howard, College of Arts & Sciences
- Paul Jenny, Planning & Management
- Ruth Johnston, Planning & Management
- Marisa Nickle, Office of the Provost
- Margaret Shepherd, Office of the President
Shared Definition of Success

- “One Administration” with a culture of service and collaboration
- Service delivery that is easy and intuitive to navigate, efficient and effective
- Continuous improvement based on data-driven decision making
- Redeployed funds within administration and/or increased value to academic units
Project Categories/Goals

> Restructure/Gain Efficiencies
> Improve Service Delivery
> Use Data for Decision Making/Technology
> Build Capacity for New Strategies
# Project Completion Timeline

## 1. Finish by June 2016
- Administrative Portal
- Create One Entry Point for Space Requests (Triage)
- Recommendations for Central Administration Organization
- Recommendations for President/Provost Offices Administrative Effectiveness
- Recommendations for Service Standards for Central Administration & Common Approach to Use of Calendar (Outlook)
- Streamline Internal Communications

## 2. Finish by June 2017
- ABB (Phase 2)
- Classroom Scheduling
- CPO/FS Cost Reduction & Service Improvement for Remodels, Design, Construction
- Email Retention Process Improvement
- Geographic Information Systems (GIS)
- Learning Management System

## 3. On-going
- Administrative Unit - Customer Satisfaction Surveys
- Administrators’ Information Flow and Feedback Process (Administrators’ Council)
- Centralize Servers/Virtualize Servers
- Data Planning and Presentation (Board of Regents Metrics)
- Redeploy Administrative Space for Mission Critical Needs

## 4. Multiple Years
- Compliance Support Platform
- Financial Aid Modernization
- Human Resources/Payroll Workday Go Live
- Innovation Ecosystem Connection
- Researcher Portal
- Student System Modernization
- UW Finance Transformation

## 5. Completed Projects
- Identify Childcare Space for Increased Capacity
- Recommendations for Bothell Administrative Efficiency
- Regents, President, Provost Attendance Requests
## Progress to Date (As of December 2015)

### Projects Dashboard

<table>
<thead>
<tr>
<th>Restructure/Gained Efficiencies</th>
<th>Sponsor</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Next Milestone Check-In</th>
<th>Project Type</th>
<th>Status</th>
<th>Status Details</th>
<th>Change Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centralize Servers/Virtualize Servers</td>
<td>Climate Action Plan Policy Committee</td>
<td>None</td>
<td>Small</td>
<td>Low</td>
<td>TBD</td>
<td>Centralize Policies &amp; Procedures</td>
<td>Yellow</td>
<td>EMIT to provide draft metrics</td>
<td>5</td>
</tr>
<tr>
<td>Recommendations for Central Administration Organization</td>
<td>TAP Team</td>
<td>Pat Voljak</td>
<td>Big</td>
<td>High</td>
<td>1/11/16</td>
<td>Streamline Admin Services</td>
<td>Green</td>
<td>Recommendations due to President and Provost in February</td>
<td>1</td>
</tr>
<tr>
<td>Recommendations for President/Provost Offices Administrative Effectiveness</td>
<td>Jerry Doolas</td>
<td>Jeff Filmore, Jeanine Tavera</td>
<td>Small</td>
<td>Medium</td>
<td>TBD</td>
<td>Streamline Admin Services</td>
<td>Yellow</td>
<td>Recommendations made, waiting for decision</td>
<td>3</td>
</tr>
<tr>
<td>Streamline Internal Communications</td>
<td>Mary Breth</td>
<td>Karen Kop, Fred Loeber</td>
<td>Small</td>
<td>Medium</td>
<td>TBD</td>
<td>Streamline Admin Services</td>
<td>Green</td>
<td>Project considering recommendations</td>
<td>3</td>
</tr>
</tbody>
</table>

### Improve Service Delivery

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Next Milestone Check-In</th>
<th>Project Type</th>
<th>Status</th>
<th>Status Details</th>
<th>Change Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABB (Phase 2)</td>
<td>Sarah Hall</td>
<td>Medium</td>
<td>Low</td>
<td>1/1/2016</td>
<td>Centralize Policies &amp; Procedures</td>
<td>Green</td>
<td>Key leaders have met and draft schedule to be discussed with Financial Transformation at February retreat.</td>
<td>2</td>
</tr>
<tr>
<td>Administrative Portal</td>
<td>Cheryl DeBocal, Amy Anderson, Sue Camber, Sarah Hall</td>
<td>Small</td>
<td>High</td>
<td>1/10/2016</td>
<td>Centralize Policies &amp; Procedures</td>
<td>Green</td>
<td>Key leaders have met and draft schedule to be discussed with Financial Transformation at February retreat.</td>
<td>1</td>
</tr>
<tr>
<td>Administrative Unit - Customer Satisfaction Surveys</td>
<td>TAP Team (Later Project)</td>
<td>Tony Dolan, Andrew Filmore, Jason Nordstrom</td>
<td>Medium</td>
<td>Medium</td>
<td>N/A</td>
<td>Assessment</td>
<td>Green</td>
<td>Not started</td>
</tr>
<tr>
<td>CPO/FS Cost Reduction &amp; Service Improvement for Remodels, Design, Construction</td>
<td>Mike McCollum/ Charlie Kennedy</td>
<td>Medium</td>
<td>High</td>
<td>N/A</td>
<td>Streamline Admin Services</td>
<td>Green</td>
<td>Not started</td>
<td>N/A</td>
</tr>
<tr>
<td>Create One Entry Point for Space Requests (Triage)</td>
<td>Tony Filmore</td>
<td>Mike McCollum</td>
<td>Small</td>
<td>Medium</td>
<td>8/22/2016</td>
<td>Streamline Admin Services</td>
<td>Green</td>
<td>Not started</td>
</tr>
<tr>
<td>Email Retention Process Improvement</td>
<td>Deral Gute</td>
<td>Medium</td>
<td>N/A</td>
<td>N/A</td>
<td>Simplify Processes</td>
<td>Green</td>
<td>Not started</td>
<td>N/A</td>
</tr>
</tbody>
</table>
# Progress to Date (continued)

## Projects Dashboard

<table>
<thead>
<tr>
<th>Improve Service Delivery</th>
<th>Sponsor</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Next Milestone Check-In</th>
<th>Project Type</th>
<th>Status</th>
<th>Status Details</th>
<th>Change Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendations for Service Standards for Central Administration &amp; Common Approach to Use of Calendar (Outlook)</td>
<td>TAP Team</td>
<td>Etta Glassman</td>
<td>Small</td>
<td>Medium</td>
<td>1/20/16</td>
<td>Central Policies &amp; Procedures</td>
<td>Green</td>
<td>Recommendations in progress</td>
<td>1</td>
</tr>
<tr>
<td>Use Data for Decision Making/Technology</td>
<td>Sponsor</td>
<td>OE Support</td>
<td>Project Size</td>
<td>Priority</td>
<td>Next Milestone Check-In</td>
<td>Project Type</td>
<td>Status</td>
<td>Status Details</td>
<td>Change Phase</td>
</tr>
<tr>
<td>Classroom Scheduling</td>
<td>Philip Reid</td>
<td></td>
<td>Medium</td>
<td>High</td>
<td>TBD</td>
<td>Central Policies &amp; Procedures</td>
<td>Green</td>
<td>Finalize of communication plan. Initiation of Milestones.</td>
<td>3</td>
</tr>
<tr>
<td>Data Planning and Presentation (Board of Regents Metrics)</td>
<td>Paul, Larry</td>
<td>Mike McCormick</td>
<td>Medium</td>
<td>Medium</td>
<td>2/20/16</td>
<td>Assessment</td>
<td>Green</td>
<td>Proceed to plan.</td>
<td>5</td>
</tr>
<tr>
<td>Financial Aid Modernization</td>
<td>Phil Ballenger</td>
<td>Jeff Filmore</td>
<td>Big</td>
<td>High</td>
<td>TBD</td>
<td>Implement New Systems</td>
<td>Yellow</td>
<td>Proceed to plan.</td>
<td>3</td>
</tr>
<tr>
<td>Geographic Information Systems (GIS)</td>
<td>Mike McCormick</td>
<td>Jeff Filmore</td>
<td>Medium</td>
<td>Medium</td>
<td>12/9/2015</td>
<td>Streamline Admin Services</td>
<td>Green</td>
<td>Proceed to plan.</td>
<td>5</td>
</tr>
<tr>
<td>Human Resources/Payroll Workday Go Live</td>
<td>Keith Truog</td>
<td>Sherry Stroswy/OE Team</td>
<td>Big</td>
<td>High</td>
<td>January 2016</td>
<td>Implement New Systems</td>
<td>Red</td>
<td>End to end testing starts</td>
<td>5</td>
</tr>
<tr>
<td>Learning Management System</td>
<td>Meg Lidstrom</td>
<td></td>
<td>Medium</td>
<td>NA</td>
<td>NA</td>
<td>Implement New Systems</td>
<td>Orange</td>
<td>Not started</td>
<td>N/A</td>
</tr>
<tr>
<td>Researcher Portal</td>
<td>Meg Lidstrom</td>
<td></td>
<td>Big</td>
<td>High</td>
<td>9/27/2016</td>
<td>Implement New Systems</td>
<td>Green</td>
<td>Launch Transparency Project</td>
<td>5</td>
</tr>
<tr>
<td>Student System Modernization</td>
<td>TBD</td>
<td></td>
<td>Big</td>
<td>NA</td>
<td>NA</td>
<td>Implement New Systems</td>
<td>Orange</td>
<td>Not started</td>
<td>N/A</td>
</tr>
<tr>
<td>UW Finance Transformation</td>
<td>Paul Peng</td>
<td>Beth Johnston</td>
<td>Big</td>
<td>Medium</td>
<td>February 2016</td>
<td>Implement New Systems</td>
<td>Yellow</td>
<td>3rd quarter with President and Provost</td>
<td>2</td>
</tr>
</tbody>
</table>

**KEY**
- **Blue**: Not Started
- **Green**: On track for timeline, scope, plan
- **Yellow**: At risk to plan, jeopardized timeline, scope change
- **Red**: Hurdle timeline, scope change
- **Purple**: Completed
### Progress to Date (continued)

#### Projects Dashboard

<table>
<thead>
<tr>
<th>Build Capacity for New Strategies</th>
<th>Sponsor</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Next Milestone</th>
<th>Project Type</th>
<th>Status Details</th>
<th>Change Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance Support Platform</td>
<td>Elizabeth Cheng</td>
<td></td>
<td>Big</td>
<td>High</td>
<td>TBD</td>
<td>Streamline Admin Services</td>
<td>Coordination team, working committee, and steering committee had weekly meetings; reports to Board of Regents. First assessment for research compliance began.</td>
<td>5</td>
</tr>
<tr>
<td>Innovation Ecosystem Connection</td>
<td>Wilton Jashgang</td>
<td></td>
<td>Big</td>
<td>Medium</td>
<td>TBD</td>
<td>Streamline Admin Services</td>
<td>Industry and startup Ecosystem Partnerships: U District Space New Industry Partnerships underway.</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completed Projects</th>
<th>Sponsor</th>
<th>OE Support</th>
<th>Project Size</th>
<th>Priority</th>
<th>Completion Date</th>
<th>Project Type</th>
<th>Status Details</th>
<th>Change Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restructure/Gained Efficiencies</td>
<td>Identify Childcare Space for Increased Capacity</td>
<td>Arne Hatch</td>
<td>Medium</td>
<td>High</td>
<td></td>
<td></td>
<td>In process of finalizing contract with vendor; expected to be finalized in Mar. 2016, expected to open in Oct. 2016.</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Recommendations for Bothell Administrative Efficiency</td>
<td>Will Yeh</td>
<td>Medium</td>
<td>Medium</td>
<td>3/2016</td>
<td>Streamline Admin Services</td>
<td>Chancellor implementing rollout plan.</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Regents, President, Provost Attendance Requests</td>
<td>Margaret Shepherd</td>
<td>Small</td>
<td>Low</td>
<td>9/30/2015</td>
<td>Simply Processes</td>
<td>Proposed being used.</td>
<td>7</td>
</tr>
</tbody>
</table>
Central Administration Units: TAP Alignment with FY 2017 Budget Process (Examples)

> 89% (16 of 18 units) are leading outreach activities and/or initiating partnerships with other UW units or functions
> 89% (16 of 18 units) are investing in software, digital assets, file management (reduce paper files, reduce duplication)
> 70% (12 of 18 units) are improving internal communications
> 55% (10 of 18 units) are aligning unit goals with UW-wide goals
> 55% (10 of 18 units) are improving online services and web presence
> 55% (10 of 18 units) are streamlining processes
> 55% (10 of 18 units) reported federal regulations and administrative burden
> 50% (9 of 18 units) reported recruitment and staff turnover
Shared Change Framework

- Common Set of Tools and Best Practices Available For Each “Step”
- Checklists and Roadmaps
- Mapping Current Project Status and Monitor Progress
- Standards of Reporting and Measurement
- Comprehensive Communication Plan
- Accessible For All OE Stakeholders

UNIVERSITY of WASHINGTON

Under Construction

1/14/16
Shared Services

Consolidation of Organizational Excellence resources into Planning & Management will help take TAP ideas to scale

– Team of 17 Organizational Development Specialists/Analysts with expertise in process improvement, project management, strategic planning, organizational assessments, facilitation skills, conflict resolution, metrics & reporting, and other related skills
Ongoing Campus Engagement

> Board of Deans and Chancellors
> Administrators’ Council
> Organizational Change Group
> TAP Project Teams (all cross-functional)
> President’s Address
> Provost’s October Email
> Website
> Unit/Group Leadership Meetings (completed: Nursing Dean’s Office; Dentistry Dean’s Office; Professional Staff Organization; Finance & Facilities, Capital Planning & Development)
> Faculty Senate in late January
Website Form to Suggest an Improvement Idea or Project

https://tap.uw.edu/
What’s to Come

> Monthly scorecard updates
> Service Standards team sets and implements standards (recommendations due in January)
> Ideas for Central Administration organization (due in February)
> Overall program metrics created: time, cost, quality (developed by end of Winter Quarter)