

## **Improved Service Delivery at Iowa State University**

### **ISD Advisory Committee Quarter 3 Report June 19, 2020**

#### **Prepared for:**

Wendy Wintersteen, President  
Pam Cain, Interim Senior Vice President for Operations and Finance  
Kristen Constant, Interim Vice President and Chief Information Officer  
Kristi Darr, Interim Vice President for University Human Resources  
Erin Baldwin, Interim Senior Vice President for Student Affairs  
Jon Wickert, Senior Vice President and Provost

#### **Prepared by:** ISD Advisory Committee

Dwaine Heppler, Human Resources Service Delivery and Strategy, committee co-chair  
Heather Paris, Finance and Support Services, committee co-chair  
Karen Cline, Finance and Support Services, committee co-chair  
Jenni Winter, Finance and Support Services, committee co-chair  
Dawn Bratsch-Prince, Academic Affairs Representative  
Chad Gasta, Department Chairs Representative  
Dan Grooms, Council of Deans Representative  
Nathan Hannover, Workday Technical Advisor  
Megan Landolt, Communications Representative  
Sarah Nusser, Institutional Effectiveness Leadership Team (IELT) Co-Chair  
Ellen Rasmussen, Operations and Finance/President's Unit Representative  
Beate Schmittmann, Institutional Effectiveness Leadership Team (IELT) Co-Chair  
Rob Wallace, Faculty Senate Representative  
Amy Ward, P&S Council Representative  
Bonnie Whalen, Student Affairs Representative  
Beth Wing, Merit Staff Representative  
Jerry Zamzow, Research Representative

## **Executive Summary**

The third quarter<sup>1</sup> of FY2020 began in typical fashion with the start of the spring semester and students returning to campus following winter break. By mid-March, an unprecedented crisis was turning not just Iowa State University, but the entire country, upside down. The COVID-19 pandemic forced Iowa State and workplaces across the nation to take extraordinary actions to prioritize health and safety and slow the spread of the coronavirus. Iowa State decided to move all 6,000 courses to virtual instruction for the remainder of the spring semester, restrict student occupancy in the residence halls, reduce on-campus work to essential operations and services, and transition all other employees to remote work.

The shift to remote work created a new dynamic for Improved Service Delivery (ISD) staff. Normally located in close proximity to the units they support, ISD staff were able to utilize the cloud-based access and anytime connectivity of Workday and ServiceNow to transition to remote work and continue to provide finance and human resources services to their units. Nearly every ISD specialist transitioned to remote work. Still, ISD recognizes this arrangement is not ideal for all units as some faculty and staff prefer personal or in-person interaction.

Customized personal service and customer-focused solutions are core to ISD's mission. ISD is leveraging campus feedback to determine where additional or enhanced focus should be directed to address persisting and emerging issues. Two major issues were elevated to top priority: the need to improve and simplify financial reporting for faculty, particularly related to grants, and the need to work with colleges and local units to optimize the hiring process for graduate assistants and student employees. Finance ISD is developing a plan for the fall semester to meet with every faculty member regarding their specific needs for financial reporting. HR ISD is developing pilot improvement projects focused on analyzing job manager and graduate assistant support roles in selected academic units; identifying consolidation, training and supervisory improvement opportunities; and implementing targeted improvements to test broader viability.

Both Finance ISD and the ISD Advisory Committee experienced leadership transition during the third quarter with the departure of Kyle Briese in February. Kyle was a Finance Manager, overseeing teams Dogwood, Fir, and Redwood. He also served as Finance lead and co-chair of the ISD Advisory Committee. Finance Managers Karen Cline and Jenni Winter subsequently absorbed his duties. Finance ISD also underwent a restructuring to establish team supervisors to serve as points of contact for Finance ISD specialists. Additionally, senior leadership in the Division of Finance and Operations worked to fill the vacant associate vice president for finance and support services position. Heather Paris, who held the position initially, was rehired in quarter four and joined the ISD Advisory Committee in May.

## **Key Performance Indicators**

A primary responsibility of the ISD Advisory Committee is to monitor ISD performance through Key Performance Indicators (KPIs). The third quarter represents the inaugural reporting of KPIs to measure performance and begin to establish an institutional baseline from which to track improvements moving forward. In subsequent quarterly reports, the ISD Advisory Committee intends to show trends for KPIs.

---

<sup>1</sup> All ISD Advisory Committee reports are posted on the [WorkCyte website](#) and provided to *Inside Iowa State*.

Category	Key Performance Indicator	Finance	Human Resources
<b>Campus Satisfaction</b>	<ul style="list-style-type: none"> <li>▪ Customer Satisfaction Survey</li> <li>▪ Quarterly feedback from ISD leadership and unit leadership</li> </ul>	<p>280 responses</p> <ul style="list-style-type: none"> <li>• 85% satisfied/very satisfied</li> <li>• 6% dissatisfied/very dissatisfied</li> <li>• 97% indicated interaction with Finance Delivery was helpful</li> <li>• 95% stated their question was addressed</li> </ul> <p>Campus feedback:</p> <ul style="list-style-type: none"> <li>• Opportunity to improve and simplify financial reporting for faculty, particularly related to grants</li> </ul>	<p>86 responses</p> <ul style="list-style-type: none"> <li>• 84% satisfied/very satisfied</li> <li>• 9% dissatisfied/very dissatisfied</li> <li>• 91% indicated interaction with HR Delivery was helpful</li> <li>• 97% stated their question was addressed</li> </ul> <p>Campus feedback:</p> <ul style="list-style-type: none"> <li>• Hiring of students and grad assistants not optimized</li> <li>• Handoffs within HR and between other areas (Finance, ISSO, etc.) still need improvement</li> </ul>
<b>ISD Employee Engagement</b>	<ul style="list-style-type: none"> <li>▪ ISD attrition and internal turnover</li> </ul>	<ul style="list-style-type: none"> <li>• 2 Fin Delivery employees left ISU in Q3 (1.6%)</li> <li>• 5 Fin Delivery employees left for another ISU job in Q3 (4%)</li> </ul>	<ul style="list-style-type: none"> <li>• 2 HR Delivery employees left ISU in Q3 (3.4%)</li> <li>• No internal turnover (employees leaving HR Delivery for another ISU job)</li> </ul>
	<ul style="list-style-type: none"> <li>▪ ISD Employee Satisfaction</li> </ul>	ISD Employee Satisfaction Survey not yet implemented	ISD Employee Satisfaction Survey not yet implemented
	<ul style="list-style-type: none"> <li>▪ Employee-driven process improvement feedback loop</li> </ul>	TBD with new ISD Finance leadership	<p>Activities initiated to improve community</p> <ul style="list-style-type: none"> <li>• Communities of Practice to allow specialists to support share skills, best practices, etc.</li> <li>• Communication/stand-ups</li> </ul>
<b>Operational Efficiency</b>	<ul style="list-style-type: none"> <li>▪ Transaction processing times (aggregated at unit/service team level)</li> <li>▪ Transactions processed per FTE</li> <li>▪ Number of re-opened resolved cases</li> <li>▪ Number of open cases per ISD employee</li> </ul>	<p>ServiceNow</p> <ul style="list-style-type: none"> <li>• 16,686 Fin Delivery incidents</li> <li>• Avg Days to Resolution – 1.3 Days</li> <li>• Avg Opened per Day – 185 incidents</li> </ul>	<p>ServiceNow</p> <ul style="list-style-type: none"> <li>• 1781 HR Delivery incidents</li> <li>• Avg Days to Resolution: 1.6 days</li> <li>• Avg Opened per Day: 43 incidents</li> </ul>

The initial metrics indicate solid performance and service among ISD specialists. The predominant tool for capturing campus satisfaction is the ServiceNow customer survey, which went live in December 2019. The ISD Advisory Committee acknowledges the judicious process used in administering the survey as a result of initial feedback from campus customers about the survey, itself. Some campus customers have indicated a desire not to receive the survey to avoid additional email traffic or they believe the survey is cumbersome.

ISD recognizes the importance of strong survey participation. Consequently, ISD is now considering how to enhance and improve the survey to support greater survey response.

The ISD Advisory Committee strongly encourages campus customers to complete the survey or provide feedback through other channels (e.g., Faculty Senate, P&S Council, ISD leadership) as this is critical to help support ISD's commitment to continuous improvement.

### **Continuous Improvement**

The ISD Advisory Committee is committed to fostering an environment of continuous improvement. During the first two months of the third quarter, ISD leadership engaged in various outreach efforts to augment the feedback provided through the customer satisfaction survey. This included providing an update to the Professional and Scientific Council, Department Chairs' Council, and meeting with a number of departments, units, and stakeholders such as department chairs and ISD staff focus groups to collect broad feedback as well as address specific issues. Finance ISD also held a second Financial Reporting Summit on January 23 for Business Unit Managers, Cost Center Managers, Fiscal Officers, and ISD finance teams to share knowledge, set expectations, and answer questions regarding Workday Financial Reports.

In March, the last month of quarter three, outreach opportunities were limited as a result of spring break and the move to virtual instruction and remote work in response to COVID-19.

ISD began using virtual meetings in April to conduct outreach, including meeting with Faculty Senate caucuses and the Research Policy and Planning Committee, which will be captured in the quarter four report. ISD recognizes the feedback from these meetings captured significant frustration of persisting issues, particularly regarding reporting in Workday, inefficient business processes, and inconsistent answers to questions.

Outreach will remain a key priority during quarter four. Additionally, top priorities for improvement in the fourth quarter of FY2020 and into FY2021 include:

- Improve and simplify financial reporting for faculty, particularly related to grants.
- Work with the Graduate College to optimize the hiring process for graduate assistants.
- Work with colleges and units to implement pilots designed to optimize student employee and graduate assistant hiring through consolidation, training and supervisory improvement of job manager and graduate assistant support roles; and implementing targeted improvements to test broader viability.
- Improve hand-off processes and procedures between Human Resources ISD and other units (e.g., Finance ISD, International Students and Scholars).
- Improve the ServiceNow Customer Satisfaction survey.
- Continue seamless delivery of Finance and HR services – whether on-campus or remote – as the university continues to navigate the COVID-19 pandemic and gradually returns to full operations ahead of the fall semester, with a strong focus on personalized customer service.