Administrative Efficiencies Committee

Meeting Agenda

I. Welcome
II. Previous Business
III. Recommending Improvement Activities
IV. Customer Satisfaction
CI is committed to continuous improvement, and routinely reviews resource allocations to ensure maximum effectiveness and identify new opportunities to improve efficiency.

**Administrative Efficiencies Committee Charge**

“to recommend operational improvement activities for administrative efficiencies in all areas of CI and its auxiliaries in order to facilitate administrative and student services that are cost effective, efficient, and strategically position the University for the future.”
## Previous Business

**Efficiency Reporting – Brian Lindgren**

<table>
<thead>
<tr>
<th>DSA Area</th>
<th>Strategic Priority</th>
<th>Action Item &amp; Brief Description</th>
<th>Efficiencies Achieved</th>
<th>Timeframe</th>
<th>Data Sources</th>
<th>Measurement of Savings</th>
<th>Dollars/Time Saved</th>
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| HRE      |                    | Online forms for HRE: Continue to identify, review and assess need for paper forms; migrate to online availability, determine applicable location, and electronic processing. | • Facility Work Orders: Transitioned from 5-part printed form to online request form through WebWorks.  
• Request for License Release: available in online Auto-response message with form setup in online housing application for those who desire to cancel.  
• Room Inventory/Condition Form: Transitioned from carbon copy paper to online process in StarRez software | 2010 – ongoing | | Reduced paper copies by more than 25,000/year (at a minimum of $0.05 per page, equates to $1,250) |
| HRE      |                    | Online resources for HRE: Maintain relevant and current information on website and other social media channels | • Increased accessibility and ease of use  
• Printing reduction: printer, paper, toner, sorting, staffing reducing (3 FTE Student employees) | 2014 – ongoing | | $19,500 in staffing + Printing costs |
| HRE      |                    | Email and Online communications for HRE: Communicate to students using electronic channels rather than printing and mailing communications home. | • Increased accessibility and ease of use  
• Increased accountability – critical information sent can be identified and verified.  
• Printing reduction: printer, paper, toner, sorting, staffing reducing (3 FTE Student employees) | 2010 – ongoing | | $19,500 in staffing + Printing costs |
| HRE      |                    | Energy Efficiencies: Continue to migrate lighting fixtures to LED with smart use (on when dark, off when light is not required). | Comparable lighting provided and significantly reduced cost. | 2015 – ongoing | | |
| HRE      |                    | Campus partnerships: Partnership with Student Business Services to distribute student ID cards at HRE check-in site. Partner with Transportation & Parking Services to view in room residents (T3) to purchase appropriate type of parking permit online. | Reduction in staff resources and provided streamlined process to have students fully integrated with the ID card and parking system. | 2013 – ongoing | | Better service to students, less staff time. |
# Administrative Efficiencies Quarterly Report

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## Information and Instructions

The Vice President for Business & Financial Affairs' Office is requesting a brief summary of campus Divisional efficiencies. Please provide information related to what your unit(s) are doing to maximize efficiencies related to optimizing resources. **Updates DUE: Nov. 15; Feb. 15; May 15; Aug. 15**

### Definitions:

- **Strategic Goal**: The strategic goal/objective to which the efficiency is aligned.
- **Event Name**: Taken from the "Project Charter Starter" document.
- **Achievement Type**: Reallocation of resources, process improvement, technology initiative, energy efficiency, cost avoidance.
- **Description**: Taken from "Project Charter Starter" document.
- **Reporting Period**: July-Sept.; Oct. - Dec.; Jan.-March; April - June
- **Measurement**: This is the difference between the current state and the future (proposed) state.
- **Dollars/Capacity**: Avg. wage, incl. benefits = $50; 2,080 FTE hours in one year.

**Example**: Saved 100 hrs per month = 1,200 hrs per year/2,080 = .58 FTE; 1,200hrs x $50 = $60k
To measure the effectiveness of a project, you’ll need metrics

Different continuous improvement models

- Our campus has endorsed Lean Six Sigma

Lean Six Sigma is effective model for collecting metrics

- Looks at current state vs. future state
- Measures vary, and include time and money

Different tools available with Lean Six Sigma

- Project charter starter
- Swim lane & flow chart
- A3 for documentation

Green Belts available to assist with Kaizen or Just Do It
Previous Business

Metrics Discussion – Pamela Abbott-Mouchou

108.75 x 4(# OF MEETINGS) = 435
.21 FTE
Previous Business
*Metrics Discussion – Pamela Abbott-Mouchou*

47.74 x 4 (# OF MEETINGS) = 190.96
0.092 FTE

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**FUTURE STATE FOUNDATION FINANCE COMMITTEE**

- Annual Calendar of Meetings
  - OOP
  - CHAIR
  - VP's
  - PROPOSE TO FOUNDATION BOARD

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**MEETING**

- 5.25 HOURS
  - CHECK VP CALENDAR 10
  - EMAIL FOR QUORUM? 30
  - TIME/DATE LOCALSE 60
  - BEACON POINT CALL 60
  - DRAFT AGENDA 30

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**PACKETS**

- 18.33 HOURS
  - EDIT MINUTES 120
  - EDIT POLICY 45
  - ALL DRAFTS INCLUDED
  - VET VP
  - VET CHAIR

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**UNIV. ADV.**

- 24.16 HOURS
  - REVIEW POLICY 240
  - P/A. BALANCE SHEET GRAPH
  - VET UA 30
  - 8 HRS
  - SET-UP BEACON PRE CALL 60
  - BEACON POINT CALL 30

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**Summary**

*Updated 2/9/2016*
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<td>Realizing our future, Cultivating Resources,</td>
<td>Finance Committee Meeting Preparation Process</td>
<td>Process Improvement</td>
<td>As the Committee grew, and became more engaged with the University's portfolio, meeting prep had become cumbersome, with wasted time and redundancy of tasks. There needed to be clarity about who was doing what, and timelines needed to be established</td>
<td>April - June 2016</td>
<td>Current state: 108.75 x 4 meetings per yr = 435 hrs. = .21 FTE Future State: 47.74 x 4 mtgs. per yr = 190.96 hrs. = .092 FTE</td>
<td>244 hours x $50 = $12,200 annually or .12 FTE capacity</td>
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<td>Implementing Collaborative Planning and Accountability Processes</td>
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Recommending Improvement Activities

Project Charter Template
Wendy Olson

Prepared by:
Expected Start Date:
Expected Savings/Avoidance:
Revision Date:

Project Information
Project Name: (Short name for easy reference)
First and Last Name: Email:
Role in Project: (Ex: Lead/Manager/Sponsor) Department & Division:
Key Contact Info (if different):

Opportunity or Problem Statement/Impact
(What, where, when) In a short statement, describe the problem or opportunity prompting this activity.

Problem/Issue and Purpose:

Business Case (1-2 sentence statement from which to make a decision whether to proceed. What is this project about and how does it impact or add value to the strategic objectives of the department/division/university):

How does the current process work?
(Include current process and any measurements in place)

Describe Effort, Project Risks, Constraints
Amount of time and resources needed. Are there resources to implement idea and to mitigate identified risks, if any?

Project Deliverables – What are Predicted Outcomes
Examples: SOP, Control Plan, Training Plan, Communication Plan, Updated Procedure Manual

Sponsor Name (print) Sponsor Signature Date
Team Lead (print) Team Lead Signature Date
Green Belt Name (print -if applicable) Green Belt Signature Date

Sponsor - Forward to OE office if project is chosen to move to next lean process steps
Customer Satisfaction

*The Case for Change - Pamela Abbott-Mouchou*
Customer Satisfaction

*HR Example – Pamela Abbott-Mouchou*

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**Tier 0: Self-service**
- PC/Internet
- Self-service
- Basic and frequently asked questions
- Routine queries and reports
- Simple transactions

**Tier 1: Customer Support**
- Phone
- Customer support
- Complex issues
- Troubleshooting

**Tier 2: Specialist Support**
- 15–20% of volume handled
- Design of policy
- Policy exceptions

**Tier 3: Centers of Expertise**
- 0–5% of volume handled

**COE**

*HR Service Center*

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