Organizational Excellence
Initiative Summary

Initiative Title: Benchmarking Study of Administrative Services

Initiative Contact(s):

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Initiative Sponsor(s):

- Organizational Excellence Executive Sponsors: EVP/COO Pat Hogan, Provost John Simon, Dean Harry Harding, and VPMB Colette Sheehy
- Organizational Excellence Leadership Council, chaired by Dean Bob Pianta

Problem Statement:

The University lacks comprehensive information about the effectiveness and efficiency of its administrative service delivery (procurement, information technology, human resources, finance, student services, and research administration). The functional activity is difficult to assess because processes are distributed among the schools, units, and central offices. Without a comprehensive, end-to-end review it is not possible to identify areas of high performance or areas for improvement.

Project Overview

Project Description/Scope

Benchmarking is the process of measuring processes and services and assessing the quality of performance to understand of the current administrative service structure and delivery and make comparisons with external, comparable higher education institutions and organizations.

For a comprehensive assessment, data will be collected from all schools and units about processes in the six functions. Additionally, stakeholder feedback will be solicited to provide insight from a user perspective about service quality and value. (The Medical Center is not included in this study.)

The University is partnering with an external consulting firm, The Hackett Group, to facilitate the data collection and lead the analysis. The Hackett Group has extensive expertise in benchmarking.

The project scope includes six functional areas: Human Resources, Information Technology, Procurement, Finance, Research Administration, Student Services

(Admissions, Student Financial Services, Registrar). A total of 90 processes were reviewed across the six functions.

The data collection process is grounded in a standard methodology that is coordinated by a function sponsor and lead. These subject matter experts help ensure consistent interpretation of process definitions and data collection throughout the institution. They serve as the functional area liaison with the school and unit data collectors, project manager, and consulting firm function lead.

Data collection tools include:
- *Function-based Questions* - Over 1000 finance, IT, procurement, and HR questions distributed to central, school, and unit teams regarding technology, volumes, practices, and costs.
- *FTE Workbooks* - Central offices, schools, and units complete templates to capture the volume of function process activities and associated costs.
- *Stakeholder Surveys* – Survey of more than 1,300 stakeholders to acquire feedback on performance.

Project Goals / Objectives

The Benchmarking Study of Administrative Services is undertaken to advance the effectiveness and efficiency of services in support of the institutional mission and strategic goals. The data will help the University better align and optimize resources. Specifically, data will be used to:
1. Assess the *current state* of processes in administrative (central-, school-, unit-based) functions.
2. Develop quantitative *performance comparisons* against higher education peers and private industry
3. Leverage *stakeholder feedback* to provide insight and context related to the perceived value and quality of services
4. Use the assessment, comparisons, and feedback to
    - develop baselines for *monitoring* future performance;
    - identify areas of *high performance;* and
    - identify *areas of opportunity* for improvement.

Project Timeline

The Benchmarking Study will be conducted from October, 2013, through February, 2014 and consist of planning, training, data collection and validation, and review of initial findings.

Core Project Team:
OE Staff – Mary Brackett, Lee Baszczewski

Function – Sponsor/Lead
Finance – Melody Bianchetto/Dave Boling, Susan Herod
Human Resources – Susan Carkeek/David King
Procurement – Eric Denby/John McHugh
IT – Virginia Evans/Alice Howard, Kevin Duvall

Student Services – Steve Kimata, Greg Roberts, Carol Stanley/Sarah Doran, Ryan Hargraves, Christina Kirkaldy
Research Administration – Gerry Kane/Kobby Hoffman, Camilla Curnow

Project Status

The Benchmarking Study initial data analysis and findings are complete. The Organizational Excellence Leadership Council is leading further analysis and interpretation, the integration of results with other data sources and ongoing projects, and the study of best practices to inform the development of an institutional portfolio of targeted initiatives. (See http://www.organizationalexcellence.virginia.edu/initiatives)

Generally, the study recommendations can be grouped around a common theme of "Designing Processes and Services to Get It Right."
- Right for the Mission – *mission-serving and focused*
- Right Structure - *service delivery model, central and/or distributed, sourcing*
- Right People/Right Job - *right type of staff engaged in right level of activity with right skills, strategic workforce planning*
- Right Process - *efficient and effective, eliminate redundancies, leverage standards, right the first time*
- Right Technology - *meet needs, automate transactions, lessen complexity, provide analytical data for informed decisions*
- Right for Faculty, Staff, Students - *effective communication, monitor and demonstrate performance*

(See Project Documentation for more details)