

# PSDS Administrative Unit Review

## 2015 External Review and 2016 Action Plan

### Background

Improving the quality of administrative processes has been highlighted with the University Financial Model, The Cornerstone Plan, the Hackett Benchmark Study, and the Office of Organizational Excellence. In light of this emphasis, Procurement and Supplier Diversity Services (PSDS) completed an administrative unit review last fall that included a unit self-study and an on-site review by an external committee. PSDS completed a self-study of its organization and functions with a focus on strengths, and perceived areas for improvement. The external review was to foster administrative excellence; to assess the quality, efficiency, and effectiveness of PSDS services; to consider the impact of current and emerging issues on services and structure; and to promote mission-centric continuous improvement.

Leaders from public institutions similar in size, scope, and reputation of UVA (University of Washington, University of Wisconsin Madison, and University of Florida) conducted the review. The external committee reviewed background materials before visiting on-grounds to interview a diverse, cross-section of University constituents and consumers of PSDS' services, as well as PSDS staff. The committee synthesized the stakeholder feedback with other findings and observations to develop the following set of recommendations for improvement.

### Summary of Recommendations for Improvement

The reviewers acknowledged the highly-decentralized nature of the University and noted that perceptions of PSDS varied widely across Grounds from being seen as a valued partner to a gatekeeper or roadblock. Their recommendations fell in the following major areas:

1. **Develop a vision and strategic plan** for the department that aligns with the University's Cornerstone Plan, and includes a vision of the desired future state, goals that roll up to the strategic plan, and metrics that directly show progress towards those goals and the vision.
2. **Enhance customer service culture** by listening and engaging with customers and working to be as flexible and nimble as to support their business needs. This includes creating a shared understanding among PSDS staff of the expectations for a high-standard of customer service. Other recommendations focused on more effective communications, including improvements to the website content, navigation and functionality; structures to strengthen communication and collaboration; standardization of communications; exploration of additional communication mediums; and dedicating a role with communication expertise.
3. **Review policies** with input from customers to find where changes can be made to streamline and simplify. This may include exploring legal interpretations, clarifying communications to ensure appropriate and intended execution, pursue relief from state regulations, and training for consistent application.
4. **Improve processes** by reviewing processes, roles and responsibilities with a customer experience lens. Conduct process analysis to assess effectiveness and efficiency, standardize and simplify.
5. **Collaborate more** with other administrative units to take advantage of existing systems and practices, with departments to highlight best practices, with each other to enhance teamwork and communication, and with management to clarify and strengthen the connection to the Cornerstone Plan.

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6. **Build continuous management and review into the entire contracting process** by partnering proactively with customers to manage contracts from idea to negotiation to execution to monitor.
7. **Better leverage data** to demonstrate value-add and inform decision-making. Enhance access to high-quality data (e.g. spend data) and actively partner with customers to interpret and apply.
8. **Re-consider the service delivery of procurement responsibilities** to reduce the amount of time staff and customers invest in transactional activity. Review which tasks are central/distributed, staff expertise, performance, specialist versus generalist roles, and best practice service models.
9. **Training and development**, especially in the areas of customer service, for all PSDS staff. Empower staff to make decisions, so that instead of one or two people being burdened by “special requests” because they are viewed as go-to people in the field, *all* staff will become the go-to.

### Moving Forward

In November 2015, PSDS transitioned to the UVAFinance organization, reporting the Vice President for Finance. This reorganization to consolidate financial operations helps to provide a single collective emphasis on transforming how UVA performs financial processes. We will leverage resources across the team to best address recommendations for improvement.

Through the winter of 2016, the entire UVAFinance organization utilized the Appreciative Inquiry method to develop a strategic vision, to build a collaborative mentality, and to initiate a transformation the UVAFinance culture. A vision to become “*the valued and trusted financial partner that the University community turns to first*” was developed and adopted. Core values to undergird every activity were carefully selected: Impeccable source of information \* Service excellence \* Innovative action \* Collaborative partner \* Valued, high-performing teams. Each UVAFinance unit, including PSDS, is developing their own mission statement to fall in line with this framework.

Throughout the spring of 2016, UVAFinance established committees and processes to intentionally address service excellence, collaboration, and employee engagement. UVAFinance has re-allocated resources to create positions to lead communications, process improvement, and employee development responsibilities. In partnership with Darden faculty, we created a LEAN certification program to instill LEAN principles in our employees (the first cohort completing in July 2016), with goal to evaluate core procurement, research administration, and finance processes immediately. Employee training programs are in development to better equip staff with key business skills, managerial and leadership attributes, process improvement and decision-making capabilities, and improved knowledge of policies, procedures, and guidelines. We are developing a strategy for creating, documenting, and communicating standardized operating procedures to better support stakeholders. Plans to utilize technology to upgrade and modernize systems and to create data-driven, analytical capabilities are moving forward. This summer, UVAFinance will partner with IT support and functional partners to re-launch UVAFinance websites, with Procurement and the Office of Sponsored programs sites prioritized. Recently, we have connected with Faculty Senate and the Faculty Senate Finance Committee to ensure we are closely aligned with the objective to reduce administrative burden on the faculty.

UVAFinance, and PSDS specifically, are actively engaged to adopt the recommendations put forward by the external review committee. We feel confident that the motions set in place will ensure that we do become “the valued and trusted financial partner that the University community turns to first.”