



VCFA Directors' 2012 Fall Breakfast/Retreat Progress Report/Guidance Document

VCA STRATEGIC INITIATIVES

The Strategic Plan for the Office of the Vice Chancellor for Administration (VCA) was adopted in 2009 to align the VCA with the campus Strategic Framework and to support UW-Madison's commitment to campuswide strategic priorities (<http://www.chancellor.wisc.edu/strategicplan/>). The VCA Strategic Plan is available online at http://www.vc.wisc.edu/VCA_Strat_Plan_Web_2010.pdf. The position of Vice Chancellor for Administration recently was retitled Vice Chancellor for Finance and Administration (VCFA) to more accurately reflect duties associated with the position.

Under its Strategic Plan, the VCFA is focusing on four of the six campuswide strategic priorities:

- Resource Stewardship: Being responsible stewards of our resources.
- Diversity: Enhancing diversity in order to ensure excellence in education and research.
- Undergraduate Education: Providing an exemplary undergraduate education.
- Recruit and Retain: Recruiting and retaining the best faculty and staff, and rewarding merit.

The VCFA has initiated a series of projects to demonstrate meaningful progress in each priority area. In addition to advancing campus and VCFA priorities, the projects are encouraging collaboration among VCFA units and with other campus partners. Projects include (1.) **Process improvement within VCFA units using Administrative Process Redesign (APR) approaches** (Strategic Priority: Resource Stewardship); (2.) **Employee Engagement** (Strategic Priority: Recruit and Retain); (3.) **Diversity and Inclusion** (Strategic Priority: Diversity; Recruit and Retain); (4.) **Student Employment** (Strategic Priority: Undergraduate Education); and (5.) **Improve access to student services through facility development** (Strategic Priority: Undergraduate Education).

The status of each of these projects and future pathways for success were discussed at the October 1 VCFA retreat. The following summarizes the content of these discussions.

Project: Process improvement within VCFA units using APR approach

This initiative, now entering its fourth year, has a goal of improving services and clearly demonstrating to campus customers and the public that resources are used responsibly by:

- Improving process efficiencies in order to enhance services and responsiveness to campus customers as well as to identify cost savings and improve the institution's financial performance.
- Sharing services across VCFA units and with VCFA partners to increase collaboration, reduce redundancy and duplication, and free up resources for reallocation.

Through the process improvement initiative, we are working to build a culture with a shared understanding of process improvement by using a common language and approach and practicing within VCA units.

The VCFA commitment to process improvement continues to grow and evolve. VCFA units have been involved in a wide range of initiatives, from working to achieve internal process improvement to the enterprise-level Administrative Excellence initiative. By this fall, nearly 230 VCA staff members will have been trained in Lean Six Sigma process improvement methodology. VCFA staff have been involved extensively in 26 APR projects and, in the past year, have made major contributions to Administrative Excellence through overall project management and leadership and participation in each of the initiative's work teams.

An important aspect of process improvement is making sure that gains in performance are sustained over time. A recent check with business owners of numerous projects found that initial gains are being sustained and, in some cases, improved upon.

The year ahead will provide important opportunities to build on process improvement successes while the VCFA commitment in this area evolves. VCFA staff will contribute to a wide range of efforts, from focused tools like Kaizen to the enterprise-level Administrative Excellence. The ultimate goal is to embed a culture that embraces continuous improvement within all VCFA units.

To continue to make strides toward our goal, we must ask and answer the following questions:

- How do we value process improvement in our organization? Do we see it as an add-on to our daily workload or is it critical to the way we function?
- Are we identifying and using metrics for measuring progress and success? Or are we relying solely on anecdotes and "gut feelings"?
- Are units examining their strategic goals and finding applications for process improvement to help achieve those goals?
- What resources, tools and support do we need? Do we have the human resources with strong facilitation and project management skills and an understanding of cultural change?

VCFA directors will continue the conversation about next steps for integrating process improvement within the culture of their divisions. We will know we are successful when process improvement is engrained in the core values of each unit, and we no longer have to place special emphasis on the issue.

By working together and with a thoughtful approach, we will make sure that day is not far off.

Project: Employee Engagement/Inclusion/Diversity

A VCFA Employee Engagement, Inclusion and Diversity initiative was developed to address the campus strategic priorities of recruiting and retaining the best faculty and staff and enhancing diversity to ensure excellence in education and research. These priorities are closely related, and a major step forward was taken this year to address them in an integrated manner.

The integrated engagement, diversity and inclusion plan outlines how these priorities will be achieved. While each component (engagement, diversity, inclusion) has specific practices which drive effective results, they all reflect complementary practices that will help UW-Madison attract, develop and retain talent.

Research conclusively shows that increasing the level of employee engagement can be a powerful strategy to increase productivity and improve organizational performance. There also are strong business reasons to strive for a more diverse workforce, especially in higher education. Diversity enriches the educational experience because we learn from those whose experiences, beliefs and perspectives are different from our own. The VCFA has embraced a broad definition of diversity, which includes not only race, gender and ethnicity but physical and mental attributes, sexual orientation, marital status, geography and values and beliefs.

A key component of this initiative during the past year was the administration of an employee engagement, inclusion and diversity survey. The survey was administered in June to about 4,500 VCFA employees, including student employees. It will help establish benchmarks for divisions to identify how to improve in these areas and assess progress by re-surveying. VCA units received their survey data in late August. VCFA directors and a data/reporting team are reviewing the survey results and will be preparing strategies for improvement. The initiative calls for a follow-up survey in 2014.

In 2012-13, the project calls for each VCFA division to develop a three-pronged approach with goals and actions for diversity recruitment, engagement and inclusion. Each plan will include division-specific goals. The Office of Human Resources will provide technical assistance, support and guidance to help divisions achieve their plans and goals.

The project also calls for the creation of a VCFA Steering Committee for Diversity, Inclusion and Engagement. Among numerous responsibilities, the committee will review VCFA-wide demographic and other diversity/inclusion data, identify areas of focus (including in recruiting), and identify and share VCFA best practices.

In addition, the VCFA will implement new and expanded diversity recruitment strategies. Individual divisions will set priorities on specific approaches, with guidance from the steering committee. Recruitment strategies will focus on:

- Developing internal VCFA talent.
- Hiring UW-Madison student talent through expanded use of the Recruitment Initiative for Student Employees (RISE) program.
- Expanded efforts to recruit external talent.

The engagement, inclusion and diversity survey administered this year provided the empirical data that will serve as a foundation for future action. Armed with this data, the VCFA is in position to act aggressively to make sure we have a diverse and highly engaged workforce.

Project: Student Employment

The Student Employment initiative is focused on increasing the role employment within VCFA units can play in student learning. VCFA units, the largest employers of students on campus, consider development of student employment as an opportunity to enhance the undergraduate educational experience. The initiative established a tool to assess student progress in three key areas:

- Collaboration and teamwork
- Independence and responsibility
- Leadership and practical skills

Through better understanding of the student employment experience, opportunities will develop to improve and advance its contribution through collaboration among VCFA units. Assessment can lead to the recruitment of more highly qualified student employees and to the development of programs and services to enhance learning and job performance. In the past year, a Student Employment workgroup has been working with units to review and analyze assessment data and develop programs and activities for improving student employment.

The initiative's goals for 2011-12 included: (a) identifying key areas of student learning achieved through employment across VCFA units; (b) evaluating and refining the assessment instrument so it can be administered again and more effectively; and (c) identifying gaps in student learning across the VCFA.

Surveys of student employees found that student employment improved skills in the area of balancing classes, work, volunteer activities and personal commitments. Student employment did not necessarily improve skills in working with difficult people, managing crisis situations and resolving interpersonal conflicts.

In surveys of both student employees and supervisors, treating others with respect was ranked highest in regard to importance as well as ability level. The largest gap between the perceptions of student employees and supervisors had to do with the ability level of student employees, which students considered much higher than their supervisors did.

Also during 2011-12, University Housing served as a pilot program by creating a series of short videos and facilitating group discussions to address three primary areas: working with difficult people, managing crisis situations and managing conflict. Student positions in areas of direct customer contact participated. Supervisors and managers also viewed the videos. In the spring 2012 post-employment survey, a question was added to try to identify who in Housing participated in the series to attempt to find a positive upswing in targeted areas. Unfortunately, the data showed a negligible change for those who completed the series.

For the next year, student employees and supervisors will again be surveyed to measure progress and help identify areas of strengths and weaknesses. In addition, the Student Employment project team will look for opportunities to connect the project with the university's HR Design initiative.

Other activities planned for 2012-13 include:

- Working with VCFA Directors to identify a core set of performance indicators and measurements (across administration) for student employee learning outcomes.
- Reviewing and updating training opportunities for VCFA employees who supervise students – as well as for student employees who supervise students.
- Developing a VCFA student leadership training program for advanced student employees and student employees in supervisory positions.
- Developing and recommending a VCFA student employee recognition program.
- Conducting focus groups with student employees and alumni regarding expectations and experiences.

Project: Improve access to student services through facility development

This initiative, aimed at helping to achieve the Undergraduate Education priority, has led to formal reviews of facility issues with the combined student services organizations as part of each biennial capital budget review. Groups included in the student life facility review are: Housing, Recreational Sports, Wisconsin Union, Dean of Students, University Health Service, McBurney Center, Student Services in Enrollment Management and General Library Services. Recommendations are forwarded to the Campus Planning Committee as part of creating the six-year capital project plan.

In Fall 2011, representatives of Facilities Planning & Management met with student services units to review an outline of recently completed and planned projects and identified needs for student services buildings and space. The group reported that nearly \$420 million worth of projects devoted to student life have either been completed since 2007 or are in design/construction. Many of these projects have successfully integrated student services within one facility or have been designed with future flexibility in mind.

The facility development initiative has reached a level of success and continuity that no longer will necessitate a stand-alone project. Instead, campus efforts to improve access to student services through facility development will be folded into the regular capital budget cycle.