

Improved Service Delivery at Iowa State University

**ISD Advisory Committee FY2021 Semi-Annual Report
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Executive Summary

This is the Fiscal Year 2021 Semi-Annual Report produced by the Improved Service Delivery Advisory Committee, covering the time period of July 1, 2020 – December 31, 2020. Based on feedback and guidance from senior leadership, for which this report is primarily prepared, the ISD Advisory Committee is moving to a quarterly meeting and reporting schedule. The quarterly reports will focus mainly on reporting out Key Performance Indicators (KPIs) for Finance (FIN) Delivery and Human Resources (HR) Delivery in accordance with ISD’s commitment to continuous improvement. The KPIs will continue to be collected quarterly by ISD leadership to support optimal workforce operations, identify successes and areas for improvement, and establish trends. The annual report produced following the close of the fiscal year in June will provide a more comprehensive look back at the fiscal year activities. The goal of this new reporting schedule and method is to promote efficiency and timeliness while maintaining transparency and accountability to senior leadership and all campus stakeholders.

Semi-Annual Performance

- FIN Delivery has noted improvement across several KPIs comparing the first six months of fiscal year 2021 to FY2020. Throughout FY20, Finance ISD had an average resolution rate of seven days for Workday transactions. This has improved to an average transaction processing time of five days for this semi-annual report. The average resolution rate for ServiceNow transactions was 0.86 days for FY20 and improved to 0.56 days for the six-month period of 2021. Customer satisfaction surveys for FY20 indicated 88% of respondents were satisfied or very satisfied with the customer service, and 95% stated their concern was accurately addressed. These results improved during the first six months of FY21, with 90% of respondents indicating they were satisfied or very satisfied with the customer service and 97% stating their concern was accurately addressed. These improved results across KPIs is a strong sign of stabilization of the FIN Delivery teams and model.
- HR Delivery has noted improvement across several KPIs comparing the first six months of fiscal year 2021 to FY2020. The time to complete Workday transactions and resolve ServiceNow incidents improved from 1.9 days for FY2020 to 1.3 days for the six-month period of FY2021 for Workday transactions. ServiceNow incident resolution also improved respectively from 1.5 days to 1.4 days. Customer satisfaction surveys for FY2020 indicated 80% were satisfied or very satisfied and 92% stated their concern was accurately addressed. These results improved during the first six months of FY2021, with 87% indicating they were satisfied or very satisfied with customer service and 96% stating their concern was accurately addressed. Stabilization continues in the HR Delivery team as well.

Key Performance Indicators

The ISD Advisory Committee monitors the following Key Performance Indicators for HR Delivery and FIN Delivery.

Category	Key Performance Indicators
Campus Satisfaction	<ul style="list-style-type: none">• Campus Satisfaction Survey• Quarterly feedback from ISD leadership and unit leadership
ISD Employee Engagement	<ul style="list-style-type: none">• ISD attrition and internal turnover• ISD Employee Engagement Survey• Employee-driven process improvement feedback loop
Operational Efficiency	<ul style="list-style-type: none">• Transaction processing times (aggregated at unit/service team level)• Transactions processed per FTE• Number of re-opened resolved cases• Number of open cases per ISD employee

The KPIs reported below are for the time period July 1, 2020 – December 30, 2020.

ServiceNow Customer Satisfaction Survey

The ServiceNow customer survey is the predominant tool for measuring campus satisfaction. Campus customers are strongly encouraged 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.

While the results of the Customer Satisfaction Surveys for both FIN Delivery and HR Delivery are largely positive, we recognize there are still a number of issues and concerns, particularly regarding Workday and the intersection of ISD and Workday to improve efficiency, workflow, and the customer experience. In January 2021, all faculty and staff were invited to complete the Workday Satisfaction Survey, which included questions about ISD. The results of the survey are under review and will inform continuous improvement plans moving forward.

Category	Key Performance Indicator	Finance July 1, 2020-Dec. 30, 2020	Human Resources July 1, 2020-Dec. 30, 2020
Campus Satisfaction	Customer Satisfaction Survey	573 responses (13.8% response rate) <ul style="list-style-type: none"> • 90% satisfied/very satisfied • 7% neutral • 3% dissatisfied/very dissatisfied • 99% indicated interaction with FIN ISD was personal, professional and courteous • 97% stated their concern was accurately addressed 	222 responses (10.3% response rate) <ul style="list-style-type: none"> • 87% satisfied/very satisfied • 8% neutral • 5% dissatisfied/very dissatisfied • 97% felt that the interaction with HR ISD was personal, professional, and courteous • 96% felt the question was accurately addressed
ISD Employee Engagement	Voluntary attrition and internal turnover	<ul style="list-style-type: none"> • 2 Finance ISD staff left ISU due to approved RIOs (retirement) and 1 Finance ISD employee left ISU due to non-RIO retirement • 3 Finance ISD staff left for another ISU position 	<ul style="list-style-type: none"> • 3 HR Coordinators voluntarily left <ul style="list-style-type: none"> • 1 from Team Pine • 1 from Team Sycamore • 1 from Team Hickory who moved to a Central UHR position • 2 of the 3 positions were backfilled, one held open to accommodate the previously announced FY22 budget reduction
	ISD Employee Engagement*	Average score of 4.13/5.00	ISD Employee Engagement Survey implementation delayed
Operational Efficiency	Transaction processing times (aggregated at	Workday Finance Transactions <ul style="list-style-type: none"> • 152,413 transactions 	Workday HR Transactions <ul style="list-style-type: none"> • 9,907 transactions

unit/service team level)	<ul style="list-style-type: none"> • Avg Days to Complete: 5 days ServiceNow Incidents <ul style="list-style-type: none"> • 24,419 assigned to FIN Delivery • Avg Days to Resolution: 0.56 days • Avg Opened per Day: 133 	<ul style="list-style-type: none"> • Avg Days to Complete: 1.3 days ServiceNow Incidents <ul style="list-style-type: none"> • 2,433 assigned to HR Delivery • Avg Days to Resolution: 1.4 days • Avg Opened per Day: 11.7
Transactions processed per FTE	Workday: 1,713 ServiceNow: 274	Workday: 261 ServiceNow: 66
Number of re-opened resolved ServiceNow cases	24,330 total incidents resolved <ul style="list-style-type: none"> • 1.9% (449) reopened once • 0.2% (39) reopened twice • 0.01%(2) reopened three times • 0.00% (1) reopened four times 	2,562 total incidents resolved <ul style="list-style-type: none"> • 3.86% (99) reopened once • 0.31% (8) reopened twice • 0.08% (2) reopened three times

*ISD Employee Engagement Survey

The ISD Employee Engagement Survey was first implemented in FY21.

FIN Delivery issued its survey to 105 staff members on December 14, 2020 and closed the survey on December 22, 2020. FIN Delivery staff were asked to complete 27 rating questions, using a 5-point scale (5=Strongly Agree, 4=Agree, 3=Neutral, 2=Disagree and 1=Strongly Agree), and 5 open-ended questions. The survey was completed by 84 FIN ISD staff members, for a response rate of 80 percent. Leadership was pleased with this strong participation rate for this first survey. Individual responses were kept confidential. Key findings from the survey include:

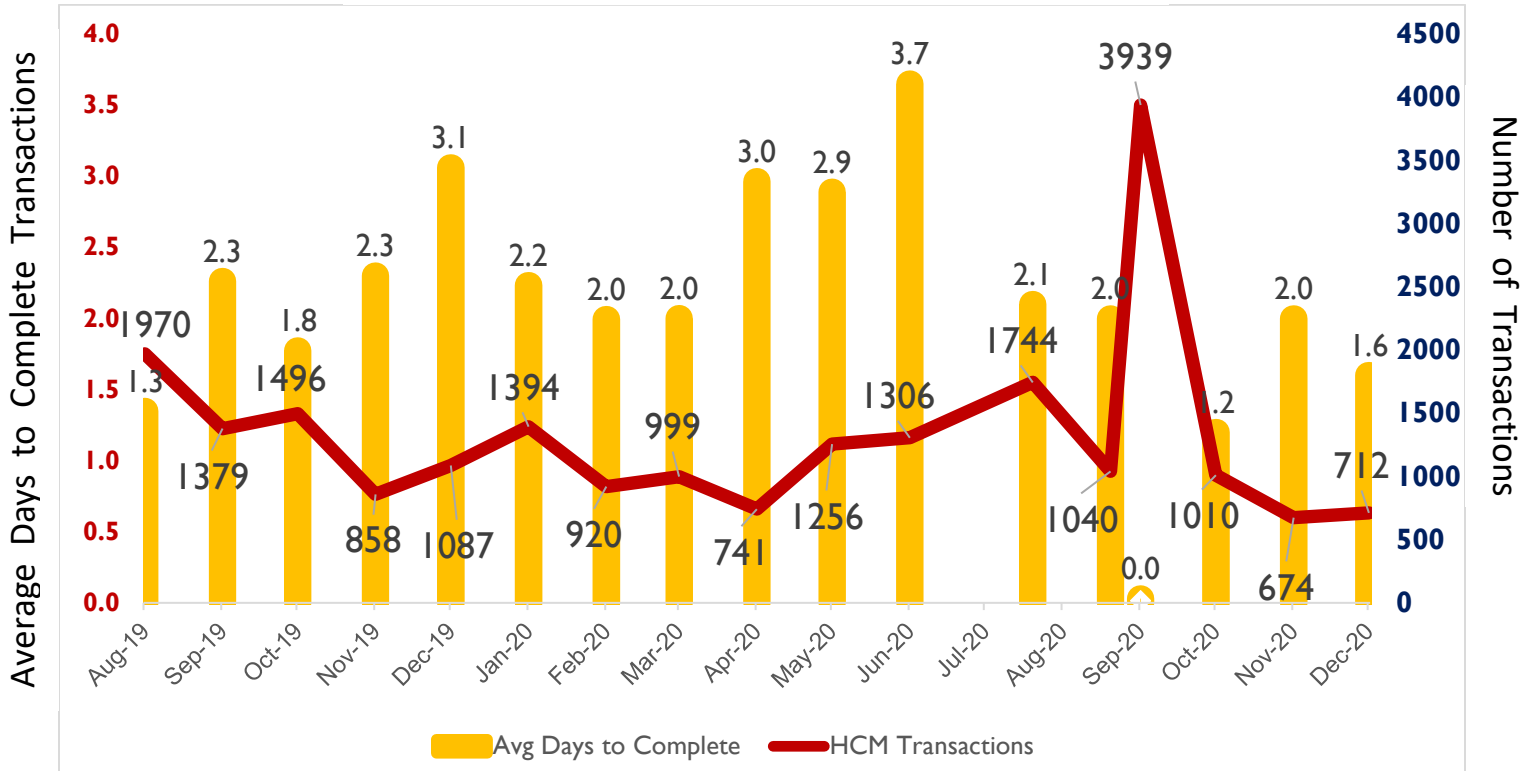
- Total Overall Average Employee Engagement = 4.13 (out of 5). This indicates the FIN Delivery team agrees that they are engaged in their work.
 - Highest Result = I enjoy working with my FIN delivery team 4.54 (52% of responses were a 5). This indicates the FIN Delivery team strongly agrees that they enjoy working with their delivery team.
 - Lowest Result = I see a path for career advancement in FIN Delivery 3.18 (13% of responses were a 5). Leadership in FIN Delivery will be meeting with teams to discuss this result and identifying actions to drive improvement.

HR Delivery decided to delay and reevaluate the implementation of its employee engagement survey to ensure individual responses could be kept confidential due to the small size of HR Delivery Teams.

Workday Transaction Metrics and Trends

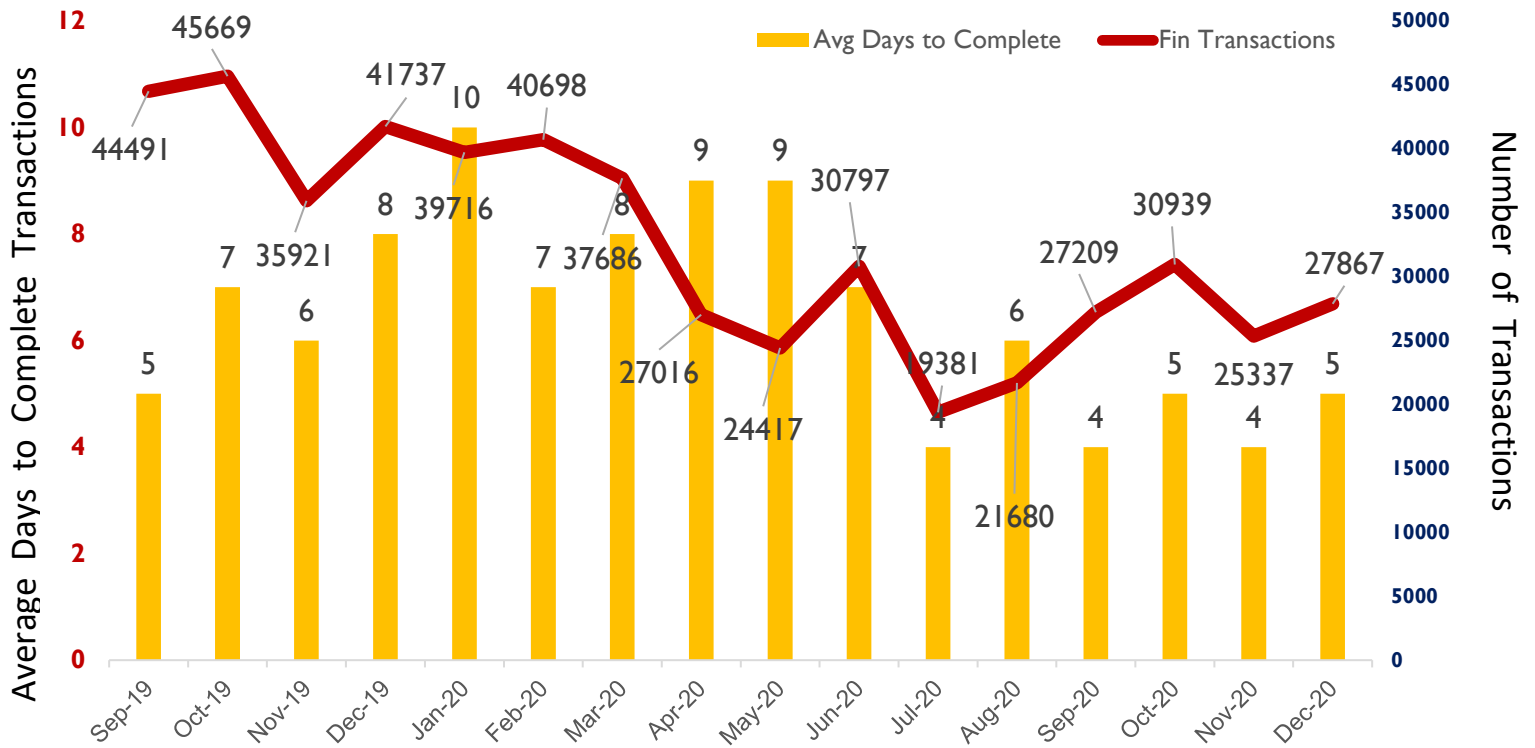
The charts below show by month the number of Workday transactions completed and average number of days to complete a transaction by HR Delivery and FIN Delivery, respectively. This data reflects transactions completed over a 17 month period, August 2019 – December 2020. This data is useful in identifying emerging trends; for example, the times of year when transactions and days to complete are higher than others, and also recognizing anomalies, such as the significantly higher number of transactions performed by HR Delivery in Sept. 2020 (explanation below). It is important to note the nature of the work performed by FIN Delivery and HR Delivery is very different, so a comparison of metrics should not be made between the functions.

Human Resources: Workday Transaction Metrics



The HR Delivery Workday transaction trends indicate a relatively low number of transactions and low number of days to complete. This is a reflection of the nature of HR’s work, which is less transactional, more interpersonal and often involves addressing complex personnel issues. The significant jump in the number of transactions in September 2020 includes 3263 transactions directly related to the implementation of the Professional and Scientific Classification and Compensation Review changes. This data shows all transactions and represents only a portion of the work that HR Delivery completes, most of which is outside Workday.

Finance: Workday Transaction Metrics



The job responsibilities of FIN Delivery include a large number of Workday transactions. The number of transactions performed Sept. 2019 – Feb. 2020 were higher than subsequent months as a result of the impact of Covid-19. FIN Delivery transactions also include effort certifications, which capture percentage of effort on federal and sponsored programs, and p-card verifications. These particular transactions often take longer than other transactions because they are reliant on a customer approval process before they can be counted as complete. From July-December 2020, 3,544 effort certifications were processed with an average processing time of 21 days and 56,175 p-card verifications with an average processing time of 9 days. Excluding these transactions, the average transaction processing time improves from 5 days to 1 day from July-December 2020.