

Improved Service Delivery at Iowa State University

**ISD Advisory Committee FY2021 Quarter 3 Report
June 8, 2021**

Prepared for:

Wendy Wintersteen, President
Pam Cain, Senior Vice President for Operations and Finance
Kristen Constant, Vice President and Chief Information Officer
Kristi Darr, Vice President for University Human Resources
Jonathan Wickert, Senior Vice President and Provost
Toyia Younger, Senior Vice President for Student Affairs

Prepared by: ISD Advisory Committee

Dwaine Heppler, Human Resources Service Delivery and Strategy, committee co-chair
Heather Paris, Finance and Support Services, committee co-chair
Dawn Bratsch-Prince, Academic Affairs Representative
Rachel Boenigk, Student Affairs Representative
Chad Gasta, Department Chairs Representative
Dan Grooms, Council of Deans Representative
Nathan Hannover, Workday Technical Advisor
Megan Landolt, Communications Representative
Rob Wallace, Faculty Senate Representative
Amy Ward, P&S Council Representative
Jake Wilson, Operations and Finance/President's Unit Representative
Beth Wing, Merit Staff Representative
Jerry Zamzow, Research Representative

Executive Summary

Both Finance (FIN) Delivery and Human Resources (HR) Delivery showed progress toward stabilization in quarter 3 of FY21 (January 1, 2021 – March 31, 2021) as indicated by improvements in certain key performance indicators (KPI) and consistent performance in others. The progress toward stabilization is especially notable as it has been achieved while FIN and HR specialists have been working remotely due to COVID-19 and navigating other challenges of the pandemic.

Customer Satisfaction Surveys are the predominant tool for measuring campus satisfaction, and survey response rates increased for both FIN Delivery (16.5% in Q3, compared to 13.8% in Q1/2) and HR Delivery (11.1% in Q3, compared to 10.3% in Q1/2). Survey results indicating customers were satisfied/very satisfied with their service increased for FIN Delivery (92% in Q3, compared to 90% in Q1/Q2) and 100% of respondents indicated their interaction with FIN Delivery was personal, professional, and courteous. While customer satisfaction was down slightly for HR (84% in Q3, compared to 87% in Q1/2), it should be noted that customers' feelings regarding the results of the newly implemented P&S Classification and Compensation (Class/Comp) Review may have influenced their survey responses. The rate of customers who felt their interaction with HR Delivery was personal, professional, and courteous remained steady in Q3 at 97%.

Workday transactions reported per quarter (see graphs on pages 5 and 6) are another indication of progress toward stabilization, while recognizing outliers for HR in Q1 and Q2 caused by implementation of the P&S Class/Comp Review and outliers for FIN caused by Effort Certifications, which require customer action that often impacts the average time to complete each transaction.

Continuous improvement remains a core focus for FIN and HR as both teams continue to address customer issues and concerns, particularly regarding Workday processes and efficiency. Both HR and FIN are working with the Workday team on continuous improvement plans based on the Workday Satisfaction Survey results. FIN Delivery is also working on phase 2 of its faculty financial reporting workbooks as well as standardizing customer outreach. HR Delivery will be playing a significant role in helping supervisors and employees navigate the return to pre-pandemic campus operations this summer.

There was an uptick in voluntary attrition and turnover for both FIN and HR in Q3, caused in part by the university's FY21 retirement incentive option (RIO) program. HR Delivery conducted its inaugural Employee Engagement Survey in Q3, noting that results may have been influenced by the HR division's significant workload increase over the past year due to the P&S Class/Comp Review and impacts of the COVID-19 pandemic. HR and FIN Delivery leadership have identified that clear career development pathways for staff is a key opportunity for improvement.

With HR and FIN Delivery making progress toward stabilization, the ISD Advisory Committee has recommended that HR and FIN begin goal-setting for KPIs. This will help HR and FIN specialists as well as the campus community better understand where improvements and efficiencies are being gained and help determine opportunities for continuous improvement.

Category	Key Performance Indicator	Finance January 1 – March 31, 2021	Human Resources January 1 – March 31, 2021
Campus Satisfaction	Customer Satisfaction Survey	185 responses (16.5% response rate) <ul style="list-style-type: none"> • 92% satisfied/very satisfied • 7% neutral • 1% dissatisfied/very dissatisfied 100% indicated interaction with FIN ISD was personal, professional and courteous 98% stated their concern was accurately addressed	106 responses (11.1% response rate) <ul style="list-style-type: none"> • 84% satisfied/very satisfied • 10% neutral • 6% dissatisfied/very dissatisfied 97% felt that the interaction with HR ISD was personal, professional, and courteous 94% felt the question was accurately addressed
ISD Employee Engagement	Voluntary attrition and internal turnover	3 Finance ISD left ISU <ul style="list-style-type: none"> • 1 to an approved RIO • 2 for positions outside ISU (2.8%) 3 left for another ISU position (2.8%)	3 HR Partners <ul style="list-style-type: none"> • 2 left ISU • 1 to college role 2 HR Coordinators <ul style="list-style-type: none"> • 1 to UHR Benefits role • 1 retiring
	ISD Employee Engagement*	Average score of 4.13/5.00	Average score of 3.16/5.00
Operational Efficiency	Transaction processing times (aggregated at unit/service team level)	Workday Finance Transactions <ul style="list-style-type: none"> • 89,103 transactions • Avg Days to Complete: 4 days • 170 effort certifications processed at avg of 114 days ServiceNow Incidents <ul style="list-style-type: none"> • 12,295 assigned to FIN Delivery • Avg Days to Resolution: 0.52 days • Avg Opened per Day: 136 incidents 	Workday HCM Transactions <ul style="list-style-type: none"> • 2919 transactions • Avg Days to Complete: 1.8 days ServiceNow Incidents <ul style="list-style-type: none"> • 1015 assigned to HR Delivery • Avg Days to Resolution: 1.1 days • Avg Opened per Day: 11.3
	Transactions processed per FTE	Workday: 1,001 ServiceNow: 138	Workday: 79 ServiceNow: 27
	Number of re-opened resolved ServiceNow cases	11,696 total incidents resolved <ul style="list-style-type: none"> • 2.16% (253) reopened once • 0.15% (17) reopened twice • 0.03% (4) reopened three times • 0.02% (2) reopened four times 	1140 total incidents resolved <ul style="list-style-type: none"> • 3.7% (42) reopened once • 0.18% (2) reopened twice • 0.09% (1) reopened three times

***ISD Employee Engagement Survey**

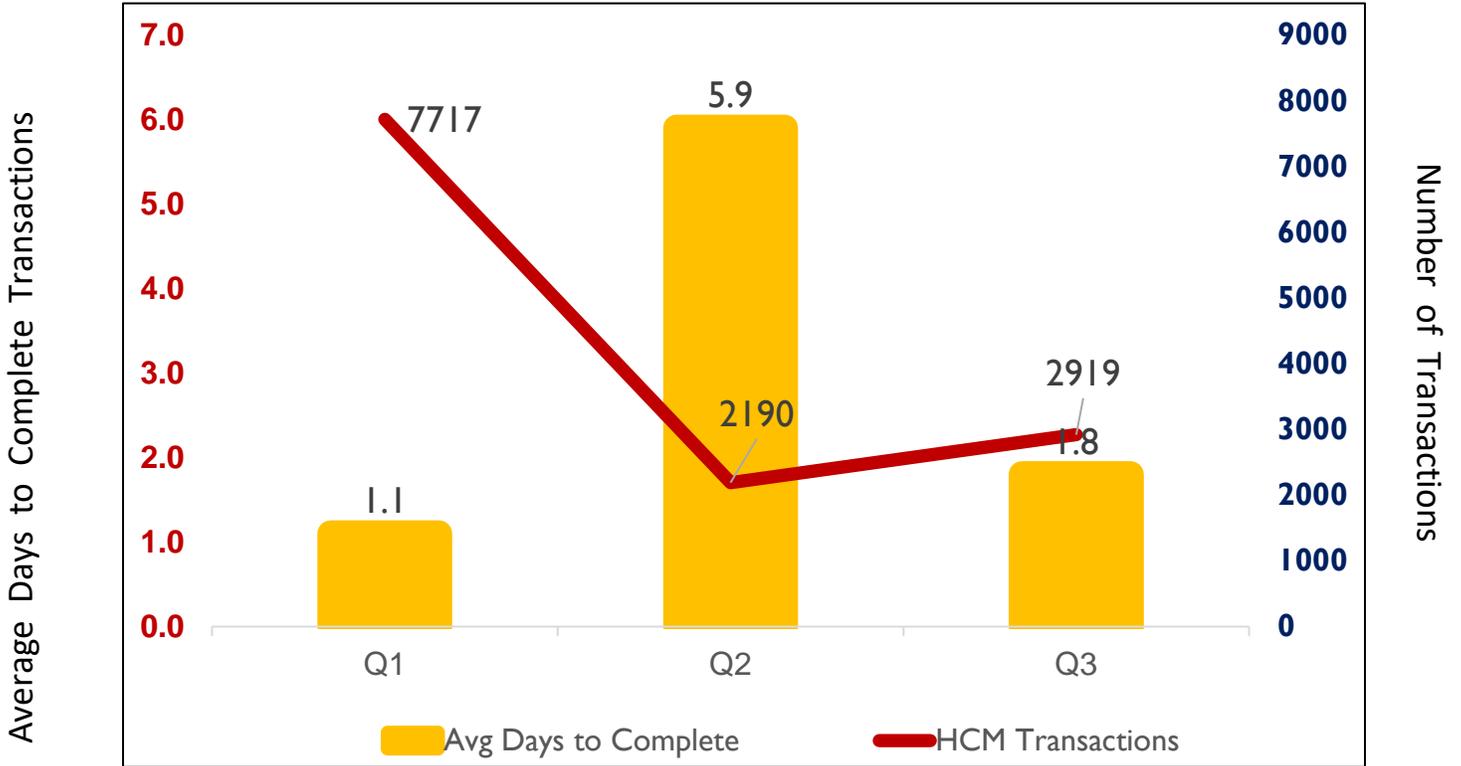
HR Delivery: Following an initial delay to reevaluate the survey to ensure respondent confidentiality, HR Delivery issued its employee engagement survey to 39 staff members on March 10, 2021 and closed the survey on March 21, 2021. HR Delivery staff were asked to complete 27 rating questions, using a 5-point scale (5=Strongly Agree, 4=Agree, 3=Neutral, 2=Disagree, 1=Strongly Disagree), and 5 open-ended questions. The survey had a response rate of 62%. Key findings from the survey include:

- Total Overall Average Employee Engagement = 3.61 (out of 5)
 - Highest Result = I enjoy working with my delivery team
4.59 (68% of responses were a 5)
 - Lowest Result = I see a path for career advancement in HR Delivery
2.71 (4% of responses were a 5)

FIN Delivery: As reported in the ISD FY21 Semi-Annual report, 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 had a response rate of 80%. Key findings from the survey include:

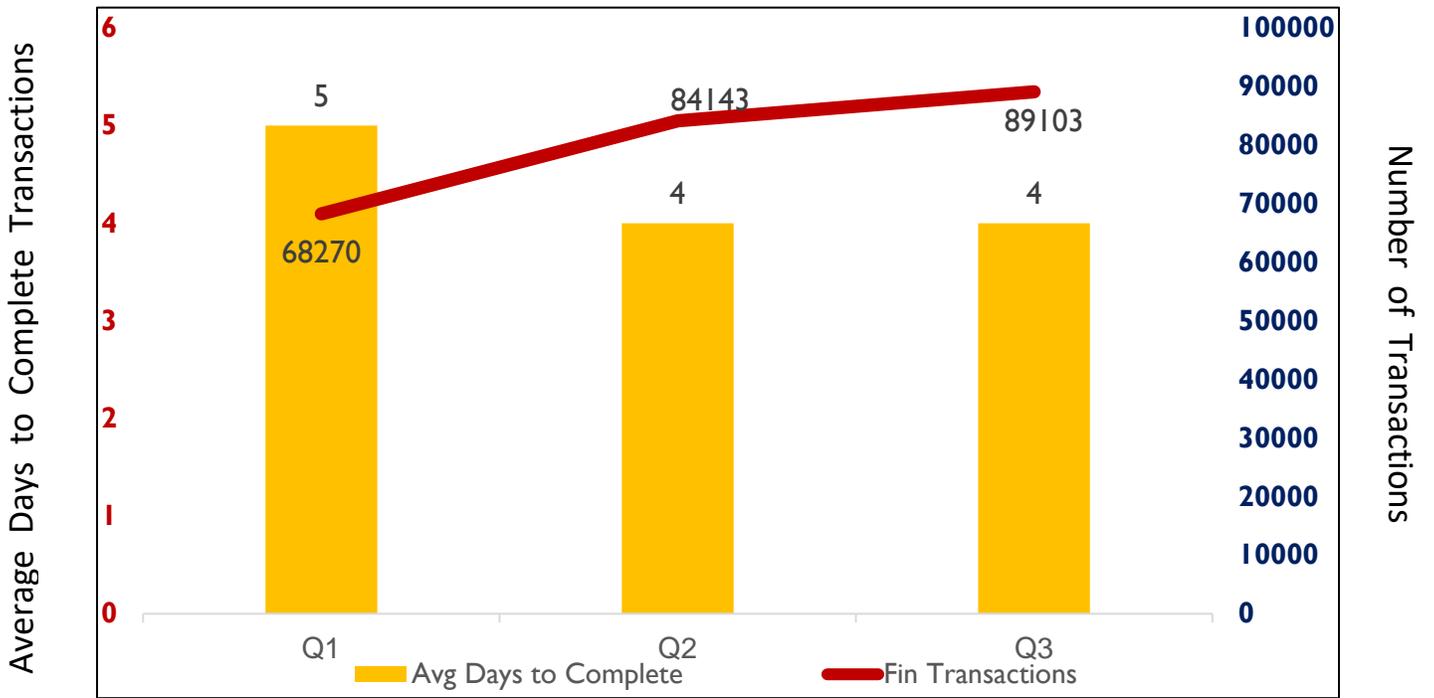
- Total Overall Average Employee Engagement = 4.13 (out of 5).
 - Highest Result = I enjoy working with my FIN delivery team
4.54 (52% of responses were a 5).
 - Lowest Result = I see a path for career advancement in FIN Delivery
3.18 (13% of responses were a 5)

Human Resources: Workday Transaction Metrics



HR Delivery saw a large increase in Workday transactions during the end of September 2020 (Q1) as a result of the implementation of the P&S Class/Comp Review. Of the total number of transactions in Q1, more than 42% (3,263 transactions) are attributed to the Class/Comp Review. The average days to complete these transactions was very low, impacted by the fact that many of the initial Class/Comp-related transactions were automated. The average days to complete jumped significantly in Q2 as a result of more involved/complex Workday transactions related to the Class/Comp review, and then subsequently dropped significantly in Q3, returning closer to Q1 levels, with a slight uptick in number of Workday transactions.

Finance: Workday Transaction Metrics



FIN Delivery saw an increase in volume of Workday transactions from Q1 to Q2 and a decrease in days to complete. From Q2 to Q3, the volume of Workday transactions and the average days to complete leveled off. The low variability in results from Q2 to Q3 is an early indication of FIN Delivery moving toward stabilization.