

Record of Proceedings:
Administrative Service Division
First Step Workshop

PREPARED FOR:

Administrative Services Division
University of Alaska Fairbanks

PREPARED BY:



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Table of Contents

- The First Step Workshop 1**
- Summary of Major Customer Presentations.....2**
- Table Recommendations for Performance Improvement5**
 - Table Recommendations..... 5
- Mission and Values7**
 - The UAF Chancellor’s Overarching Themes..... 7
 - University of Alaska Fairbanks Mission Statement 7
 - University of Alaska Fairbanks Administrative Service Division Mission Statement..... 8
 - Administrative Services Division Values..... 9
- Action Plans10**
 - Action Plan Accountability..... 11

The First Step Workshop

The management team of the University of Alaska Fairbanks Administrative Services Department (ASD) convened in a one-day strategic workshop at the Wood Center on campus on January 30, 2009. The purpose of the workshop was to bring together leadership from throughout the diverse 400-employee division to re-establish the organization's common mission of service, address key issues of concern to all managers, and to identify concrete action plans for performance improvement. Attending were 40 managers, assistant managers and other key ASD personnel.

The workshop was led by Vice Chancellor of Administration Pat Pitney, and facilitated by Eric McDowell of McDowell Group, Inc., an Alaska professional services firm with a long-time professional relationship with the University of Alaska system.

The workshop had two major components – presentations by major customers, and a facilitated open discussion. Vice Chancellor Pitney opened the workshop with introductory comments, setting the stage for the day. Six speakers then addressed the management team from their perspectives as major customers of ASD services. Each speaker described their particular job and their vision for their portion of the University. They addressed service issues and offered solutions (and compliments for specific current service levels) for how ASD could better serve their organizations. Speakers were:

- Provost and Executive Vice Chancellor Susan Henrichs (Academic Affairs)
- Acting Vice Chancellor Jennifer Carroll (Rural, Community and Native Education)
- Associate Vice Chancellor John Blake (Research)
- Vice Chancellor Jake Poole (Advancement and Community Engagement)
- Vice Chancellor Tim Barnett (Student and Enrollment Services)
- Chief Information Technology Officer Steve Smith

Following these presentations and a brief lunch break, participants began a facilitated open discussion that included these components:

- Table team recommendations for service improvements that would have the greatest impact on achieving the UAF mission.
- All participants discussing (and agreeing upon) a new refined mission statement specifically for the Administrative Services Division.
- Participants identified the values that shall guide the behavior of all ASD employees in pursuit of the ASD and UAF missions.
- Open discussion of action items that could increase ASD service delivery as related to the UAF mission.
- Identifying and prioritizing five major action plans that managers consider essential to achieving both the ASD and UAF missions.
- Closing comments of all participants regarding the value of the workshop process.

Summary of Major Customer Presentations

The six major UAF customers of ASD summarized their jobs, expressed their vision for their area, identified ASD service topics and offered solutions for these service issues. Summaries of each presentation follow.

Provost and Executive Vice Chancellor Susan Henrichs (Academic Affairs)

Vision:

- Attract Alaska's best
- Increase graduation rates
- Help students progress
- Increase enrollment and learning options
- Improve Alaska Native success
- More engagement and support of the wider community

Service Topics:

- Need ASD to handle things related to administration to allow us to better do our job.
- Help with things that are hard to do like hiring a student (very difficult for us) – we need a simple tool.
- Communication – the advice we need on how to do things is often not available – suggest guidelines for how best to respond.
- Compliments for: Physical plant, handling of honor students, and renovation.

Acting Vice Chancellor Jennifer Carroll (Rural, Community and Native Education)

Vision:

- Responding to local needs in underserved communities
- Contributing to workforce development where it is most needed
- Making lifelong learning available in remote locations

Service Topics:

- Difficulty with HR, timeliness, and communications
- We need help "getting to yes!"
- More flexibility to our needs, more alternative solutions instead of "no"
- No more student put-downs
- Suggest more student focus and smooth service for our students
- Compliments for: Facilities services, and grants and contracts

Associate Vice Chancellor John Blake (Research Services)

Vision:

- Strategically growing research beyond \$150 million
- Tie research closely to the entire institution
- Be ambitious in this age of uncertainty

Service topics:

- Be prepared to change and evolve our practices to serve research and other UAF entities
- Communication is critical

Vice Chancellor Jake Poole (Advancement and Community Engagement)

Vision:

- Growing success in alumni relations, fund raising, recruiting new students
- In five years, everybody is part of the UAF family
- We have a successful capital campaign raising \$20-\$30 million

Service Topics:

- Need progress in grants and contracts
- Compliments for: Improvements in procurement and HR

Vice Chancellor Tim Barnett (Student and Enrollment Services)

Vision:

- Create a good student experience staying for completion
- Achieve national average for 6-year completions
- Help for the unprepared
- Modern recruiting model – actively marketing to prospective students
- Enrollment increases in ocean sciences and engineering
- New housing facilities and more modern student facility

Service Topics:

- Needed for ASD: Training in customer service
- Eliminate ping/ponging entirely
- Problem: no fixed schedule for setting rates
- Student hire procedure very cumbersome and difficult – need upgrade
- Open billing – tell us why
- Establish a no-later-than date
- Documents describing Polar Express

Compliments for:

- Housing support, ADM, improved HR for non-students
- Police, food service
- Purchasing and travel

Chief Information Technology Officer Steve Smith

Vision:

- Serving UAF, statewide and the total system as a complete system
- Our #1 priority always is security
- We are problem solvers and our priorities are in this order:
 - Problems affecting many people that are easy to fix
 - Problems affecting a few people that are easy to fix
 - Problems affecting many people that are hard to fix
 - Problems affecting a few people that are hard to fix

Service Topics:

- Team approach needed when people are gone. Saying, "So-and-so is gone, we can't help you." is an absolute service no-no.
- Bring us to the table early before you decide what programs and equipment you need – we can solve your problem, but not after you go it alone.
- You own the content; we just help with the vehicles.
- Disaster recovery plan is needed.

Table Recommendations for Performance Improvement

Workshop participants conducted discussions at each of the six tables, coming to consensus on actions that could enhance the delivery of ASD services in the best interests of the overall UAF mission. Table notes are recorded verbatim.

Table Recommendations

"What would make the most difference in ASD serving the overall UAF mission?"

TABLE #1

Communication:

- Website simplicity – website updating
- Need resources, need to prioritize

Take responsibility:

- Lack of coverage when folks go on vacation – need cross training for shared responsibility.
- Give rewards to incent "Ownership of cross-training" and to reward those who step up to the plate and take cross training!

How to promote from within – supervisor training

Student hiring – need simpler process

Communication:

- Decentralize decision-making (where possible) to the knowledge holders who can make and effect decisions. This will require training, empowering, giving responsibility and authority.
- Websites – students are digital. They will look for information on websites. We need to update websites. We lack resources. Possible answer: Students are capable of this function! They are a plentiful labor pool. We are utilizing their expertise to help us train them for future jobs.

TABLE #2

- Recognize a lot of what Administration Services does deals with state and federal laws – need to educate campus users on the requirements. Also have a way to deal with odd things that come up.
- Sufficient personnel with knowledge base to do the job and make decisions.
- Streamline processes – re-evaluate what we do, why we do it, how we do it.
- Need access to information and databases at UAF – access only as needed.
- Beef up and utilize systems we already have in place. i.e., Polar Express for building access, etc.

- Facilities, infrastructure as well as M&R have to keep pace with environment – i.e., if we want to bring more students into the University system we need the facilities and space to put there. If facilities and space are substandard they won't stay.

TABLE #3

Automation of workflow items - example: timesheets.

Emergency alert notification

- Proactive communication
- Emergency alert and response
- Public safety

Strategic funding plan

- Analysis of services – streamline and reduce duplicate services
- Strategic funding across silos
- Good for the organization – not just good for me

TABLE #4

- Communicate – what we do and what is driven by compliance issues
- Risk averse issue
- Single point of failure – how to remove ping-ponging

TABLE #5

- Service to please – “Learn to say yes”
- Information re; grants “Q menu/Vista plus” – timing of information
- Process mapping – push some things back to unit level
- Banner: User needs, have many people put together browsers and merging Banner finance and HR needs. What browsers actually pull
- If low risk – do it, do things quickly
- Post doc mining (?) – more trust, more consequences
- Procurement and HR consistency and backups need improvement

TABLE #6

- Training incentives for all - staff/students/faculty
- Communication – giving the extra effort
- Communicating who can help with specific problems
- Empowering users
- No problem is unique – all need to work to solve problems

Mission and Values

The mission statement of the University of Alaska Fairbanks and the revised mission statement of the Administrative Service Division were central to the day's discussions. In addition, Chancellor Brian Rogers addressed the management team by teleconference and emphasized the three overarching themes of his administration. These themes, along with the UAF and ASD mission statements, were posted in the conference room and guided the presentations and discussion throughout the day.

The UAF Chancellor's Overarching Themes

Put people first

Engage the community

Take responsible action

Participants discussed and recognized the overall UAF mission as the purpose being supported by all ASD service delivery.

University of Alaska Fairbanks Mission Statement

The University of Alaska Fairbanks, the nation's northernmost Land, Sea and Space Grant university and international research center, advances and disseminates knowledge through teaching, research and public service with an emphasis on Alaska, the circumpolar North and their diverse peoples. UAF – America's arctic university – promotes academic excellence, student success and lifelong learning.

ASD Mission Statement

The following new revised ASD mission statement is considerably more detailed than the previous mission statement. Participants discussed the concepts represented by the additional language in the new revised statement and came to consensus. Clarification of these new concepts follows the mission statement.

University of Alaska Fairbanks Administrative Service Division Mission Statement

The Division of Administrative Services inclusive of facilities services, grants and contracts, finance and auxiliary services, procurement, human resources, police, fire, and risk management is a team that collaboratively provides safe and effective support services for students, faculty, staff and other constituents to achieve the University of Alaska Fairbanks mission.

"Inclusive", meaning all elements of the department are honored as important integral parts of a functioning whole with a common mission of service.

"Team", in that all employees and parts of the ASD support one another in their success to the extent possible.

"Collaboratively provides" speaks to the spirit in which ASD provides services to customers in all parts of the University, as well as to their fellows within the ASD.

"Safe and effective" are bottom-line performance standards for the ASD. The ASD must insure a completely safe environment for successful learning to take place. The ASD must be effective in all its endeavors, achieving the desired end result of administrative service delivery in a supremely competent manner.

"Students, faculty, staff and other constituents" acknowledges the wide universe of customers for whom the ASD inclusive team collaboratively provides safe and effective service.

"To achieve the University of Alaska Fairbanks mission" is the honorable service purpose of each ASD employee and unit.

Values Discussion

Workshop participants produced the following admirable list of values. Values are defined as principles that shall guide the professional and personal behavior of all ASD employees as they serve the missions of UAF and the ASD. The values named by participants are sorted into four general categories.

Administrative Services Division Values

| Ethics Values | Support Values | Leadership Values | Performance Values |
|----------------------|-----------------------|--------------------------|---------------------------|
| Integrity | Flexibility | Humility of team | Accountability |
| Honesty | Recognition | Servant leadership | Effective |
| Transparency | Collaboration | Leadership by example | Professional service |
| Safety | Compassion | Good stewardship | Resourcefulness |
| Loyalty | Support | Institutional leadership | Timeliness |
| Respectfulness | Humor | Listening | Synergy |
| | | | Results-driven |

Action Plans

Throughout the day, from the morning's presentations to the table recommendations and in virtually all discussions, participants and speakers identified dozens of candidates for constructive action for service improvement. Near the end of the day, participants identified five major action plan categories, listing them in approximate order of priority.

- **Communications Action Plan**
- **Empowerment Action Plan**
- **Process Efficiency Action Plan**
- **Professional Services Improvement Action Plan**
- **Collaboration Action Plan**

All detailed action plan suggestions were then sorted into these five categories. These five action plans and the many suggestions will form the basis for the ASD "First Step Action Plan." Vice Chancellor Pitney made the first accountability commitment and pledged to have the "First Step Action Plan" drafted by the end of the day on February 13, 2008

Communications Action Plan

- Transparency
- Email policies
- Database access sharing
- Emergency alert notification
- Communicating ASD limitations
- Prioritize information to be communicated
- Information access
- Website updates
- Employee and customer surveys
- Director meetings
- Constituent communications
- Distinguish content vs. vehicle for content

Empowerment Action Plan

- Authority/responsibility match
- Centralization problem
- Sufficient personnel
- Risk adverse assessment
- training
- Student hiring
- Statewide relationship

- Resources
- Accountability
- HR qualifications
- Recognition program

Process Efficiency Action Plan

- Single point of failure
- Automation
- Emergency alert notification process
- Website updates
- Student hiring
- Low risk? Do it
- Browsers
- Statewide
- Database access sharing

Professional Services Improvement Action Plan

- Flexibility
- No ping/ponging
- Say yes to solving the problem
- Coverage 24/7
- Low risk? Do it.

Collaboration Action Plan

- Funding sharing
- Efficiency cooperation

Action Plan Accountability

One initial action plan task resulted from the workshop – to begin the action planning process based on the input during the workshop. Vice Chancellor Pitney committed to draft priority action plan tasks by the end of the day on February 13, 2009. Below is a simple format for action planning that lists the specific action task, identifies the responsible party, sets a timeline, and records when the task is actually done.

First Step Action Plan

| Action Task | Responsibility | By When | Done When |
|---|------------------------|-----------------------|------------------|
| Develop "First Step Action Plan" priority tasks | Vice Chancellor Pitney | EOB February 13, 2009 | |