ISD Update

Inaugural ISD Advisory Committee Report

• ISD Advisory Committee History and Role
• Recognition of Change
• ISD Accomplishments
• Challenges
• Staffing
• Key Performance Indicators
• Looking Ahead
Advisory Committee History and Role

- Evolved from the Institutional Effectiveness Leadership Team (IELT)

Guiding Principles
- HR and Finance transactions completed specialists who are accountable for their work and given tools and training
- Staff to know the missions and activities of the units they serve
- Service to be measured with high-quality, reliable, accurate, consistent, and efficient support provided
- Processes and policies to be practical, current, and transparent to all involved, aligned with the University’s mission
- Provide staff opportunities for professional development.

Goals
- Improve Employee Experience
- Support the Unit’s Mission
- Enhance our Culture of Service

ISD Advisory Committee Members
- Dawn Bratsch-Prince, Academic Affairs Representative
- Chad Gasta, Department Chairs Representative
- Dan Grooms, Council of Deans Representative
- Nathan Hannover, Workday Technical Advisor
- Megan Landolt, Communication Representative
- Sarah Nusser, Institutional Effectiveness Leadership Team (IELT) Co-Chair
- Ellen Rasmussen, Operations and Finance/President’s Unit Representative
- Beate Schmittmann, Institutional Effectiveness Leadership Team (IELT) Co-Chair
- Rob Wallace, Faculty Senate Representative
- Amy Ward, P&S Council Representative
- Bonnie Whalen, Student Affairs Representative
- Beth Wing, Merit Staff Representative
- Jerry Zamzow, Research Representative
Advisory Committee Responsibilities

- Advocate for the success of improved service delivery for campus and ISD employees
- Monitor Key Performance Indicators
- Review service team inquiries and trends
- Solicit feedback from campus to identify areas for improvement
- Review satisfaction survey results
- Provide feedback on staffing
- Support an environment of continuous improvement
Unprecedented Change

• Improved Service Delivery arguably the largest administrative endeavor at ISU
  • Immense cultural change
  • Impact to daily operations of departments, colleges and units
• ISD must have high proficiency and customer service
• Workday implementation, while its own initiative, significantly added to the amount of change
• Finance and HR specialists are focused to help campus understand and accommodate Workday and resulting policy and procedural changes
**Accomplishments**

- Ten service teams established to support designated campus units
- Teams were staffed internally
- Staff were trained in weeks prior to go-live while fulfilling current roles
  - Workday and ServiceNow
  - Finance Specialists learned new accounting methodology
- Work space, equipment and other tools secured for ISD specialists
- Teams built to develop collaborative working relationships
- Job aids and learning materials developed to help campus
- ISD specialists assisted transition for their prior departments/roles
Challenges

- Transition required many ISD specialists to acclimate to new position, supervisor, teammates, physical location and client community.
- Massive cultural change resulted in a sense of loss for some while some departments struggle to backfill or reorganize to complete work that remains in the department and identify efficiencies.
- In some cases, local high-tough human interaction replaced with Workday and ServiceNow interaction.
- Ongoing training puts additional pressure on specialists as they adjust to new workload demands.
- Roles are still being clarified to better define services to provide and access to information.
- Departments, colleges and other units desire a deeper level and more frequent interaction with ISD specialists.
- ServiceNow tickets closed before customer feels the issue is resolved.
- Frustration on movement of issues between finance and HR on certain business processes.
Staffing

- Staffing of ISD was targeted at 94% of model design and costs were allocated at this level vs 100%
  - Target staff of approximately 150 people for both finance and HR
  - Initial staffing limited to internal candidates
  - Not all who transitioned felt the move was aligned with career goals, leading to some turnover
- High number of campus-wide position requisitions resulted in addition of two 9-month temporary recruiting coordinators
- ISD Finance supervisor roles added post go-live to better coordinate and align finance activity within each service team
Key Performance Indicators

- A primary responsibility of the ISD Advisory Committee is to monitor metrics for ISD performance. During the development phase of ISD (pre go-live), the following categories and metrics key performance indicators (KPIs) were suggested for the ISD Advisory Committee’s consideration:

<table>
<thead>
<tr>
<th>Category</th>
<th>Key Performance Indicators</th>
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<tbody>
<tr>
<td>Campus Satisfaction</td>
<td>• Customer Satisfaction Survey</td>
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<td>• Quarterly feedback from ISD leadership and unit leadership</td>
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<td>ISD Employee Engagement</td>
<td>• ISD attrition and internal turnover</td>
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<tr>
<td></td>
<td>• ISD Employee Satisfaction</td>
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<td></td>
<td>• Employee-driven process improvement feedback loop</td>
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<td>Operational Efficiency</td>
<td>• Transaction processing times (aggregated at unit/service team level)</td>
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<td>• Transactions processed per FTE</td>
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<td></td>
<td>• Number of re-opened resolved cases</td>
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<td>• Number of open cases per ISD employee</td>
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- Not all KPIs have been fully implemented
  - Customer satisfaction surveys were just launched in the past month
  - ISD Employee Satisfaction Surveys have not yet been utilized.
- The ISD Advisory Committee anticipated that KPIs collected over the first six months of implementation would not provide enough meaningful reference data
- ISD Advisory Committee will continue to monitor and evaluate the KPIs
Feedback and Continuous Improvement

• Advisory Committee has collected feedback and will continue to do so
• Community comments have and will focus on problems that need to be fixed – issues collected reflected in “Challenges”
• Continuous improvement actions taken by ISD to date include:
  • Campus interaction and service improvement through ServiceNow feedback survey responses
  • Outreach to campus user groups to address Workday concerns, service delivery issues and local support needs
  • Analysis of KPIs to identify and implement process improvements
  • Training of existing and new staff to continuously build knowledge on Workday and functional processes and tools
• ISD’s commitment continues to be supporting campus and helping utilize Workday in a productive and efficient way
Questions and Concerns Always Welcome!

Please contact us directly or a member of your local ISD team with any questions or concerns!

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Survey of Student Parent Experiences

• Initiative of President Wintersteen’s Child Care Task Force

• Survey of current ISU undergraduate and graduate students who are pregnant or parent/guardian to a child under 18 years

  • *Gain insight regarding lives and experiences of current ISU undergraduate and graduate student parents*

  • *Determine current status of and reveal gaps in institutional resources for student parents*

  • *Guide development of additional supports*

  • *Provide data and evidence for student parent advocacy*

• February 9 – February 28