Service Delivery at Iowa State University

Service Delivery (SD) Advisory Committee FY2022 Annual Report
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Executive Summary

Fiscal year 2022, July 1, 2021 – June 30, 2022, marked the third year for the finance (FIN) and human resources (HR) service delivery structures at Iowa State University. As the university emerged from the challenges of the COVID-19 pandemic, FY22 HR and FIN operations returned to, and in some cases were well above, pre-pandemic levels, while an increasingly competitive job market presented new challenges.

Increased productivity and improved customer satisfaction

FIN Delivery experienced a significant year-over-year increase in Workday transactions (up 32% to 484,706) and ServiceNow incidents (up 80% to 86,342) due largely to the addition of the Accounts Payable supplier invoice function to the FIN Delivery structure as well as the resumption of research, travel, purchasing, and other activities at or above pre-pandemic levels.

HR Delivery also saw a notable year-over-year jump in Workday transactions (up 13% to 19,275) and ServiceNow incidents (up 14% to 5,878) due in part to the two-phased adjustment of the P&S classification and compensation structure and a growing number of compensation adjustments to address movement in the job market.

The higher transaction volume for both HR and FIN Service Delivery was accompanied by strong improvements in customer satisfaction. For FIN Service Delivery, customers indicating they were satisfied or very satisfied with their service increased from 88% in FY20 to 93% in FY21 to 94% in FY22. For HR Service Delivery, satisfied or very satisfied customer responses increased from 80% in FY20 to 86% in FY21 to 92% in FY22. [**see charts, pages 6 and 7**]

Year-over-year, the rate of respondents that stated their concern was accurately addressed increased from 94% to 98% for HR and dipped slightly from 99% to 98% for FIN. An uptick of 98% of respondents for both FIN and HR stated their interaction was personal, professional and courteous.

Key accomplishments

Human Resources

Employee and Leadership Support
- Supported the successful transition of employees' return to campus work locations as part of COVID-19 response.
- Supported development and delivery of WorkFlex, ISU's flexible work program for P&S and Merit employees.
- Supported the Division of Academic Affairs in process improvements for faculty pay adjustments, performance management and remote work requests.
- Supported three large remote work pilots across campus to enable better consistency in implementation, reporting and analysis of fully remote work at ISU, enabling two pilots to move to approval of permanent remote work and recruiting for fully remote positions.

Operations
- Maintained steady performance and customer service ratings throughout the pandemic and return to campus.
- Drove standardization of supervisory organization naming across campus to more easily identify the work and hierarchy of the organization through its org name.
- Developed a knowledge management framework to serve as a multidisciplinary approach to achieve organizational objectives by making the best use of knowledge.
- Implemented a standard request process for division head review and approval requests for remote work beyond that offered through WorkFlex.

Staff Learning and Development
- Increased HR Delivery employee human resources acumen and support of the service delivery model.
- Administered two employee engagement surveys, leveraging responses to improve new employee onboarding and training, career development and internal promotion and movement opportunities, improved feedback and communication mechanisms and employee morale.
- With the support of Huron Consultants, executed an activity study across UHR that identified staffing and process gaps. Implemented additional staffing recommendations to 44 FTEs for Delivery, conducted process evaluation of faculty recruiting across services teams and implemented process consistency measures, leveraged automated reports created by HR Information Management that were placed in a created HR Delivery Dashboard in Workday, developed competencies for all UHR jobs, and implemented employee recognition through the UHR Teams channel.
- Shared client feedback obtained through ServiceNow customer service surveys on refreshed UHR website and to recognize individual UHR team members in the UHR Teams channel.

Finance
Education and Outreach
- Implemented leadership rounding with business unit managers to gather feedback on finance delivery operations.
- Launched a new comprehensive finance service delivery website.
- Developed the Financial Officers Reports and Tasks (FORT) Dashboard in Workday as a resource to help cost center managers and grant coordinators quickly access beneficial reports and tasks.
- Participated in development of a sponsored funding education training course which is required for Principal Investigators (PIs).
- Disseminated information regarding Iowa Code 80.45A (human trafficking prevention) and implemented training for procurement and expense specialists to verify compliance with the law.

Operations
- Absorbed the accounts payable function and aligned invoice processing with the procurement and expense specialist role.
- Implemented hybrid work pilot program utilizing the renovated Financial Services Building, with staff coming to campus at least 3 to 4 times per month for in-person training and professional development.
- Implemented exit interviews for employees leaving finance delivery.

Leadership and Development
- Several finance delivery employees were recognized with CYtation awards: The assistant manager of operations for finance received an individual award, the operations team received a team award, and the associate vice president for finance services received the Woodin CYtation award.
- Six finance delivery employees were #CyThx honorees.
- Four members of the finance service delivery leadership team participated in an eight-session Dale Carnegie leadership course.
- Held professional development seminar on service recovery for specialists and leadership team.

Movement in job market creates retention challenges
HR Delivery experienced attrition challenges during the fiscal year due to an increasingly competitive job market for human resources professionals. Ten HR Delivery employees left Iowa State, while three others were promoted to roles in central HR and three were promoted to other positions within the university. A total of 17 new staff have been hired to fill the vacancies. Four HR Delivery staff were promoted within the HR Delivery structure

FIN Delivery experienced voluntary turnover to a lesser degree with eleven employees being promoted to other positions within the university, three employees accepting roles outside of Iowa State, and one retiring.
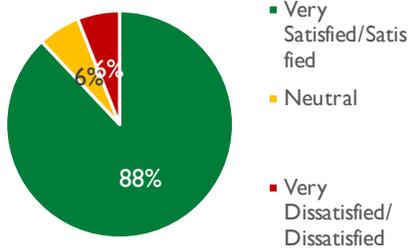
FY22 Key Performance Indicators (KPIs)

Category	Key Performance Indicator	Finance July 1, 2021 – June 30, 2022	Human Resources July 1, 2021 – June 30, 2022
Campus Satisfaction	Customer Satisfaction Survey	1,341 responses in FY22 (13.2% response rate) • 94% satisfied/very satisfied • 3% neutral • 3% dissatisfied/very dissatisfied 98% indicated interaction with FIN ISD was personal, professional and courteous 98% stated their concern was accurately addressed	90 responses in FY22 (15.8% response rate) • 92% satisfied/very satisfied • 6% neutral • 1% dissatisfied/very dissatisfied 98% felt that the interaction with HR ISD was personal, professional, and courteous 98% felt the question was accurately addressed
Service Delivery (SD) Employee Engagement	Voluntary attrition and internal turnover	15 FINDL employees left in FY22 (15%) • 13 left for another position (promotion) at ISU • 3 left for roles outside of ISU • 1 retired	10 HRD employees left ISU in FY22 (22.7%) • 5 for promotional opportunity • 2 left ISU for higher salary • 1 moved out of central IA • 1 moved for spouse job • 1 retired 3 HRD employees left for another ISU position (6.8%) 3 HRD employees promoted to other UHR positions (6.8%) 4 HRD employees promoted within HRD (9.1%) 17 new staff hired into HRD in FY22

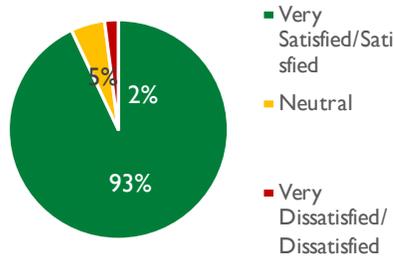|			
	Employee Engagement Survey	Average score of 4.22/5.00	Average score of 3.92/5.00
Operational Efficiency	Transactions processed per FTE	Workday: 5,102 ServiceNow: 908	Workday: 438 ServiceNow: 134
	Transaction processing times (aggregated at unit/service team level)	Workday Finance Transactions • 484,706 transactions • Avg Days to Complete: 4 days • 7,401 effort certifications processed at avg of 20 days • 44,961 supplier invoices at avg of 3 days – began 2/1/22 ServiceNow Incidents • 86,342 assigned to FINDL • Avg Days to Resolution: 0.80 days • Avg Opened per Day: 237 incidents	Workday HCM Transactions • 19,275 transactions • Avg Days to Complete: 2.2 days ServiceNow Incidents • 5878 assigned to HRD • Avg Days to Resolution: 3.3 days • Avg Opened per Day: 19.4
	Number of re-opened resolved ServiceNow cases	68,092 total incidents resolved • 2.7% (1826) reopened once • 0.2% (121) reopened twice • 0.03% (20) reopened three times	6118 total incidents resolved • 5.7% (349) reopened once • 0.51% (31) reopened twice • 0.05% (3) reopened three times 0.02% (1) reopened four times

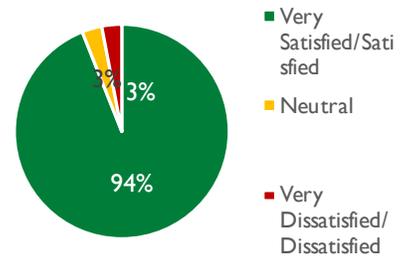# Three Year Comparison: Fin Delivery

FY 2020
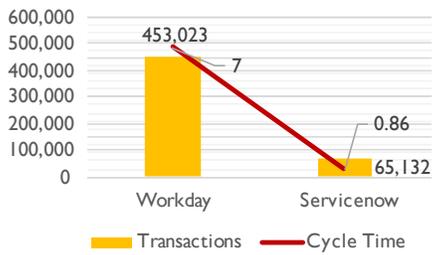
Satisfaction

- Very Satisfied/Satisfied
- Neutral
- Very Dissatisfied/Dissatisfied

88%
6% 6%

Transactions

453,023
7
0.86
65,132

Transactions — Cycle Time

FY 2021

Satisfaction

- Very Satisfied/Satisfied
- Neutral
- Very Dissatisfied/Dissatisfied

93%
5% 2%

Transactions

368,357
4
0.56
48,095

Transactions — Cycle Time

FY 2022

Satisfaction

- Very Satisfied/Satisfied
- Neutral
- Very Dissatisfied/Dissatisfied

94%
2% 3%

Transactions

484,706
4
0.8
86,342
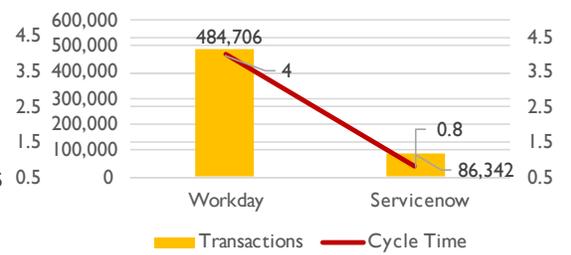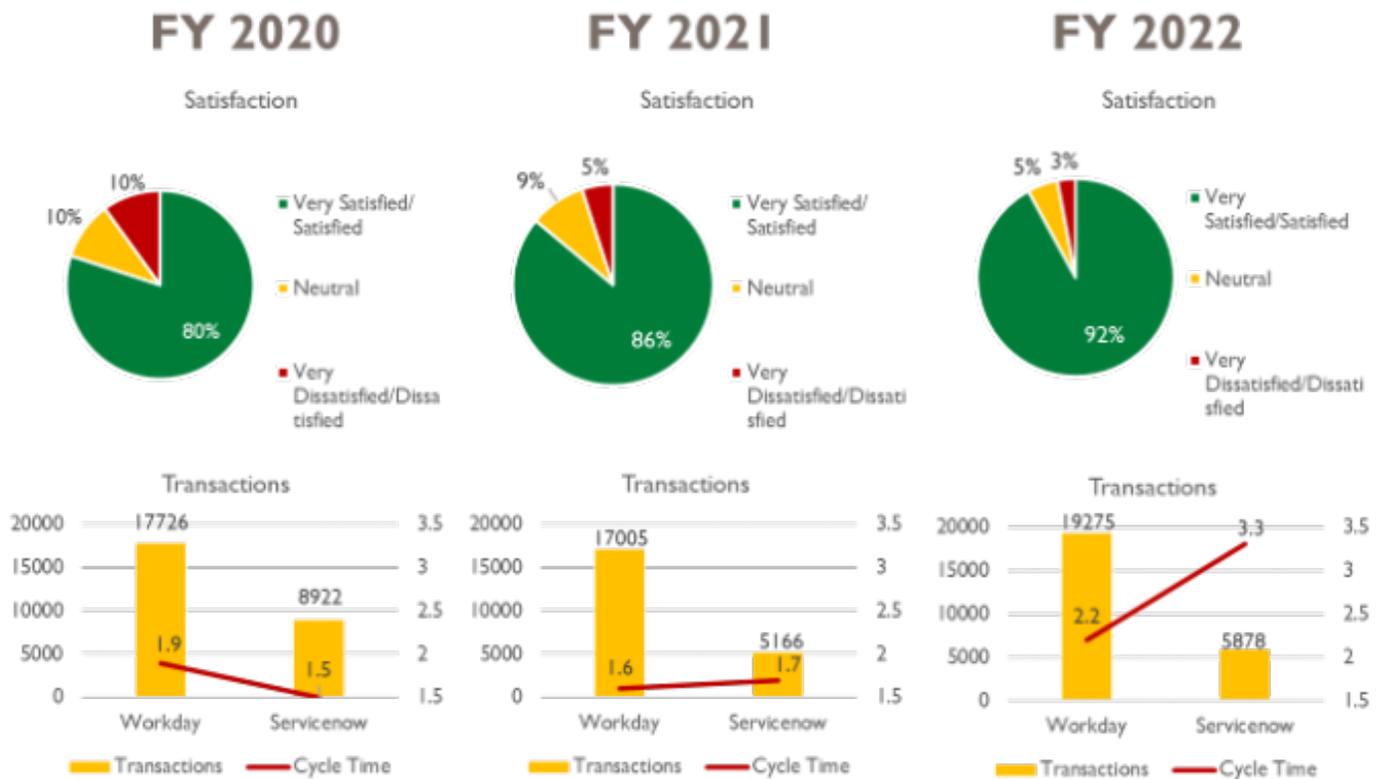
Transactions — Cycle Time
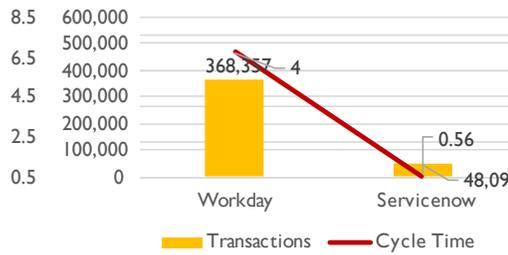
Three Year Comparison : HR Delivery

FY23 Priorities

The following priorities for FY23, July 1, 2022 – June 30, 2023, were developed in alignment with the respective unit's strategy and priorities in addition to feedback provided by the Service Delivery Advisory Committee.

Finance

- Complete reclassification of Procurement & Expense Specialists (PES) to appropriately align job classification with duties and responsibilities.
- Optimize supplier invoice processing to reduce manual work, avoid payment errors, and maximize payment discounts.
- Implement post-training competency assessments and surveys for specialists to gather feedback on effectiveness of training efforts.
- Develop competency based digital training content for FSD specialists to provide a consistent onboarding framework and on-demand courses.
- Develop leader dashboards to track team key performance indicators and align supervisor efforts with overall unit goals.
- Create development plan for supervisors and senior leaders to bolster leadership skills, increase employee engagement, and help shape the culture and strategy of FSD.
- Provide support for Interim SVP for Operations and Finance.

Human Resources

- Support consideration of WorkFlex program changes regarding level of remote work and modification or elimination of application windows.

- Implement behavior-based competencies and training for UHR staff.
- Implement the next phase of HR Delivery staff learning and knowledge acquisition/management to improve staff proficiency.
- Develop and implement efficiencies and improved performance related to compensation delivery, workforce and position planning, and talent management.
- Heightened focus on staff talent development to improve retention.
- Development of operational key performance indicators and supervisor dashboards for UHR to evaluate and address team performance in real time.