UNIVERSITY OF ILLINOIS SYSTEM

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

BPI

Business Process Improvement
Shared Service

FY17 ANNUAL REPORT

Contents

Since 2011, the Business Process Improvement (BPI) Shared Service provides support for initiatives seeking to improve customer service, free up staff time, deliver services faster, reduce total cost, or a combination of those goals. As the University of Illinois System continues to face budget and resource challenges, it is important that we perform introspective analyses across our operations and processes to ensure their efficiency and productivity. The BPI Shared Service can assist organizations to perform this work. Support is provided across the System through a pool of resources available for facilitation of targeted process improvement projects, a methodology and toolset for executing process improvement projects, and training on the concepts and techniques of process improvement initiatives.

This annual report is a means to communicate BPI Shared Service operations transparently with BPI Shared Service stakeholders. We hope this report will be useful to the System community as a window into the various quality initiatives taking place throughout the System. Your feedback is welcome and invited.

Highlights

Led

19

process analysis or improvement events

Completed

8

process improvement projects and

5

process analysis efforts, resulting in

62

recommendations for process improvement within UIC, UIUC, and the System Offices

Trained

270

participants in process improvement concepts, tools, and techniques, bringing the total trained since Fall 2011 to

1,454

Directly engaged over

70

units through participation in training and project work or by supporting the BPI Shared Service extended team
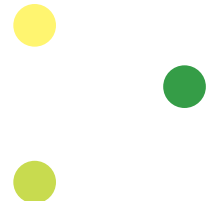
Business Process Advisory Group Member Listing

The Business Process Advisory Group (BPAG) meets on a quarterly basis to review project progress, prioritize proposed projects, and provide guidance and advice. The group members represent diverse units across the University of Illinois System.

Kelly Block, Assistant Vice President, Portfolio & Process Management (System Offices)

Dilip Chhajed, Professor, College of Business (UIUC)

Steve Everett, Dean, College of Architecture, Design, and the Arts (UIC)

Michael Hites, CIO and Senior Associate Vice President, AITS (System Offices)

Mike Kamowski, Director of Student Services Systems (UIC)

Gloria Keeley, Assistant Vice President of Administrative Services (System Offices)

Kathy Martensen, Assistant Provost for Educational Programs (UIUC)

Jami Painter, Interim Associate Vice President for Human Resources (System Offices)

John Rossi, Deputy CIO, IT Service Delivery, Technology Services at Illinois (UIUC)

Angela Yudt, Associate Vice Provost, Office of the Vice Provost for Faculty Affairs (UIC)
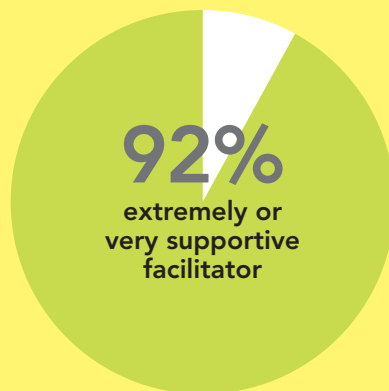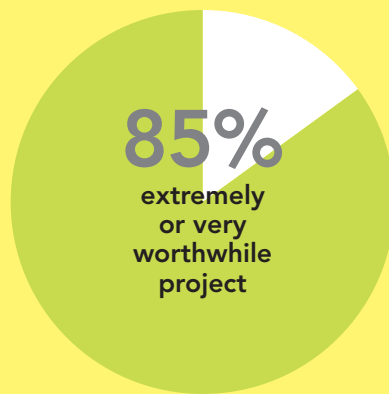
Julie Zemaitis, Executive Director, University Audits (System Offices)

Ilir Zenku, Assistant Vice President, Information Technology, Office of the Vice President for Health Affairs (System Offices)

Projects

Project Satisfaction

In FY17, BPI implemented a project satisfaction survey, sending the survey to team members on 7 projects. Of those responding to BPI project satisfaction surveys, these are the results:

85%
extremely or very worthwhile project

100%
extremely or very collaborative environment

92%
extremely or very supportive facilitator

FY17 Completed Projects and Work Requests

PPMO-0045 BANNER HR CONFIGURATION MANAGEMENT PROCESS IMPROVEMENT

Develop a more efficient process for managing HR configurations in Banner while minimizing risk of adverse changes to Banner and downstream systems (e.g., Nessie, New Hire, HR Frontend, NOA, etc.)

PPMO-0050 EMPLOYEE OFF-BOARDING PROCEDURES PROCESS IMPROVEMENT

Create an effective off-boarding process that terminates enterprise access and stops payroll in a timely manner following an employee's separation

PPMO-0053 FACULTY INTERACTIONS WITH CORPORATIONS ANALYSIS

Develop a process and systems to track University interactions with corporations more effectively

PPMO-0054 THE GRADUATE COLLEGE GRADUATION CERTIFICATION PROCESS IMPROVEMENT

Streamline the graduation certification process at the Graduate College, reducing the amount of time required by both Graduate Student Academic Services auditors and graduate department/program certifiers

PPMO-0057 ANNUAL SABBATICAL LEAVE PROCESS IMPROVEMENT

Streamline the annual sabbatical leave process for all three universities of the System, reducing lead time, providing quicker transmission and ease of access, and more expedient reporting and tracking

PPMO-0058 OFFICE FOR THE PROTECTION OF RESEARCH SUBJECTS PROTOCOL APPLICATION PROCESS IMPROVEMENT

Increase office efficiency by improving customer service, decreasing turnaround time, and decreasing investigator burden

PPMO-0068A ENGINEERING IT SHARED SERVICES ACCOUNTING AND INVENTORY CONTROL

Reduce the amount of time spent on the annual budget cycle while developing process improvement facilitation and analyst roles within the College of Engineering

PPMO-0068B ENGINEERING IT SHARED SERVICES ACCOUNTING AND INVENTORY CONTROL

Increase efficiency by designing an improved process for the inventory scrap/surplus process by standardizing business practices of IT staff and students

WR-BPI-0033 AITS ACCESS REQUEST AND REVIEW PROCESS ANALYSIS

Coordinate the analysis and improvement effort for the AITS access request and review process, feeding results into PPMO-0040 Unit Security Contact Request Process Improvement project

WR-BPI-0035 COLLEGE OF ENGINEERING EARLY ALERT PROCESS ANALYSIS

Assist Urbana's College of Engineering to assess the feasibility and process requirements for an early alert system in support of student success initiatives

WR-BPI-0036 MANAGING COMPENSATION FOR HUMAN RESEARCH SUBJECTS ANALYSIS

Assist the Business Solutions & Support (BSS) unit within the Office of Business & Financial Services (OBFS) to facilitate discussions between faculty, researchers, staff, and representatives from OBFS and the Office for the Protection of Research Subjects (OPRS) on how human research subjects are compensated

WR-BPI-0037 UNIVERSITY PAYROLL & BENEFITS PROCESS ANALYSIS

Facilitate high-level process mapping sessions focused on University Payroll & Benefits processes

WR-BPI-0040 ILLINOIS FIRE SERVICE INSTITUTE PROCESS ANALYSIS

Perform a 5S activity to organize, standardize, and sustain a productive work environment for the Fire Institute Test Repository

Featured Projects

PPMO-0048 COLLEGE OF DENTISTRY POINT-OF-SERVICE MANAGEMENT PROCESS

In five phases, the project team identified all-encompassing operational improvement opportunities throughout the College of Dentistry specific to claims and collections, scheduling patients, registering patients, patient check-in, and patient check-out. This in-depth analysis yielded 215 action items to advance policy and procedures related to communications, technical capability, expanded reporting, staffing, and training.

The team expects these improvements to positively impact the college's bottom line in the long run, however, due to the current state budget impasse and the challenges around provider payment, the financial impact will only become clear upon resolution of this situation. An interim check of patient payments collected on the day of service showed an increase of 3% (based on high-level data), indicating that implemented actions are beginning to produce measurable improvements.

*As of April 2017, **89%** of Dentistry action items were either completed or in progress.*

Annual Sabbatical Leave Process Improvement team members contributed to a hands-on mapping activity that results in a polished process map reflecting the current state.

PPMO-0057 ANNUAL SABBATICAL LEAVE PROCESS IMPROVEMENT

The annual sabbatical leave process involves all three universities within the University of Illinois system and is administered by the Office of the Vice President for Academic Affairs. Coordination is required between many different groups and the existing procedures were cumbersome (including a heavily paper-based component), required several levels of approval, and often resulted in incomplete forms.

Through this project, the team identified one long-term and two short-term recommendations, resulting in a standardization of the submission process across the System, as well as the selection of one digital workflow solution (FormBuilder) to transform the manual paper process to a digital process. Expected results include a 24% time savings and a cost reduction of $30,410.

PPMO-0065 UNIVERSITY PROCUREMENT SOURCE-TO-PAY PROCESS ANALYSIS AND IMPROVEMENT

The BPI Shared Service partnered with the Office of Business and Financial Services (OBFS) to develop the largest system-wide business process improvement effort to occur in years. This project started in July 2016 with a pilot to determine the feasibility of multiple project teams documenting, evaluating, and improving multiple processes in tandem. Following the pilot, the nearly two-year project began in earnest, with staff from BPI and OBFS (in both Urbana and Chicago) running process improvement teams, while regularly drawing in feedback from focus groups in Chicago, Springfield, and Urbana. Of the 24 distinct process improvement projects determined to exist in the current source-to-pay system of processes, 14 have been completed as of the end of FY17.

University Procurement Source-to-Pay Process Analysis and Improvement team members collaborate in an activity designed to categorize issues identified within the current state.

Results of this multi-year analysis effort include streamlining the source-to-pay system of processes using the tools currently available as well as developing requirements for a system-wide Request For Proposals for a new enterprise software solution that will allow for further increases in efficiency.

PPMO-0068 ENGINEERING IT SHARED SERVICES ACCOUNTING AND INVENTORY CONTROL

Engineering IT Shared Services provides IT support and solutions for Urbana's College of Engineering. Its annual budget cycle runs from March to January and consumes 38% of the Business Manager's time per fiscal year. The main goals of the current funding model are to ensure that Activity Based Costing bases the services and hours on where staff spend their time through data collection, and to allow the Engineering IT Shared Services to remain a self-supported function. The current annual budget development process lacked efficiency and failed to allow for sufficient succession planning. Also, the accounting process for equipment and property was cumbersome and sometimes inaccurate.

Through these combined projects, the team identified 16 recommendations, which are expected to result in faster and more accurate data collection and equipment processing. This will provide the Business Office staff members with a time-savings on their various related tasks, which will be reallocated to focus on other job duties.
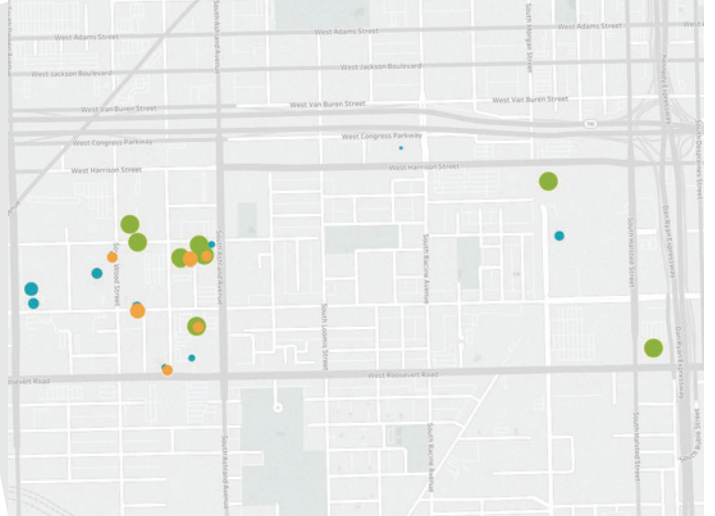
BPI Reach

With a small core staff based on both the Chicago and Urbana campuses, the BPI Shared Service interacted with over 70 units across the System in FY17. Interactions include:

- training participants in half-day sessions covering process improvement topics (represented in blue)

- training and mentoring individuals who completed the four-month Business Process Improvement Facilitator training program, who become BPI "extended team" members upon graduation (represented in yellow)

- engaging units in multi-month process improvement projects or short-term work requests led by members of the BPI Shared Service core staff or extended team members (represented in green)

In the maps below, the bubbles represent the locations of the units BPI has worked with this year. Projects and work requests are a standard size, as are the bubbles representing extended team members gained this year. The blue bubbles represent the number of training participants from a particular location in FY17, and their sizes vary in correspondence to the amount of participants from that location.

FY17 BPI Reach: **Chicago**

FY17 BPI Reach: **Urbana**
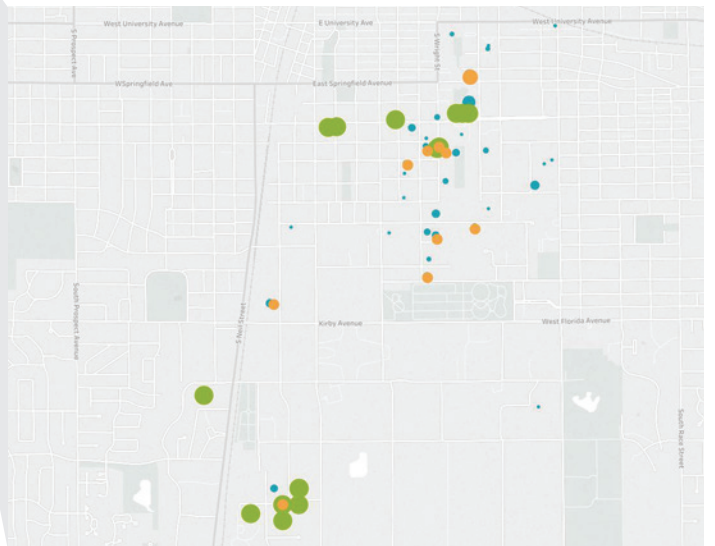
Key

🟠 Extended Team	· 1 training particpant
🟢 Projects and Work Requests	• 4 training particpants
🔵 Training Session Attendees	● 8 training particpants
	● 16 training particpants

Partnerships

For this inaugural event, BPI received positive feedback: **91%** *of attendee respondents were satisfied or very satisfied with the Showcase overall.*
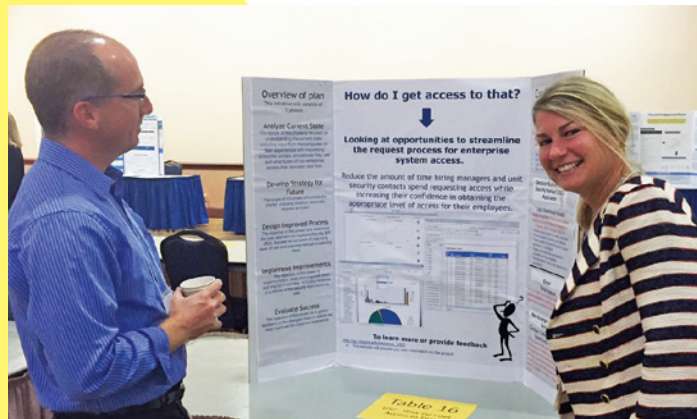
Business Process Improvement Showcase

On September 22, 2016, the BPI Shared Service hosted the Business Process Improvement Showcase at the Illini Union on the Urbana campus. This inaugural event attended by nearly 200 members of the Urbana campus faculty and staff was developed as an opportunity to share ideas on how to improve business processes at the University of Illinois at Urbana-Champaign, delivering faster, better services to our faculty, students, and other stakeholders given the current fiscal environment.

The showcase was an open, free event for all members of the University of Illinois community to participate, share, and learn.

Dr. Paul Ellinger (Vice Provost for Budget and Resource Planning), **Dr. Edward Feser** (Interim Vice Chancellor for Academic Affairs and Provost), and **Dr. Michael Hites** (CIO for the System Offices and Senior Associate Vice President, AITS) spoke at the event, highlighting the importance of striving to improve business processes in the keynote as well as the opening and closing remarks.

Other groups also participated in the success of this event, with 21 vendors present to explain how their services could help streamline processes, and 26 campus units that shared their process improvement experiences either in poster presentations or during breakout sessions. Also, Carol Mullaney, Director of Continuous Improvement at the University of Notre Dame, shared her experiences leading process improvement initiatives in higher education. Specifically, she shared what her organization has learned through their journey, what strategies worked, and how process improvement can help higher education meet the challenges that are widespread today.

A member of the BPI extended team displays her poster describing the process improvement project she completed as part of the Business Process Improvement Facilitator Training Program.

**BPI Showcase attendees for the breakout session led by Carol Mullaney of the University of Notre Dame**

NCCI Participation

For the past six years, BPI has participated in the Network for Change and Continuous Innovation (NCCI) organization, which is an international group that focuses on process improvement in higher education. BPI staff members served on the Annual Conference Committee, participated in webinars, and presented at the July 2016 Annual Conference. NCCI was also a sponsoring organization for the first Higher Education Lean Exchange (HELEX) program spear-headed by Amy Glenn of BPI.

Higher Education Lean Exchange

The first Higher Education Lean Exchange (HELEX) event was held at the University of Illinois at Chicago campus on May 23, 2017. This event, organized by Amy Glenn of BPI and sponsored by NCCI, was intended as a day for Lean Practitioners in higher education to collaborate and exchange ideas. Discussion topics included "Coaching Your Leadership," "Measuring the Success of Your Program," and "Building Lean Capacity."

Twelve Lean Practitioners attended this event, representing the following institutions: Michigan Technological University, Northwestern University, University of Illinois, University of Michigan, University of Notre Dame, and University of Waterloo.
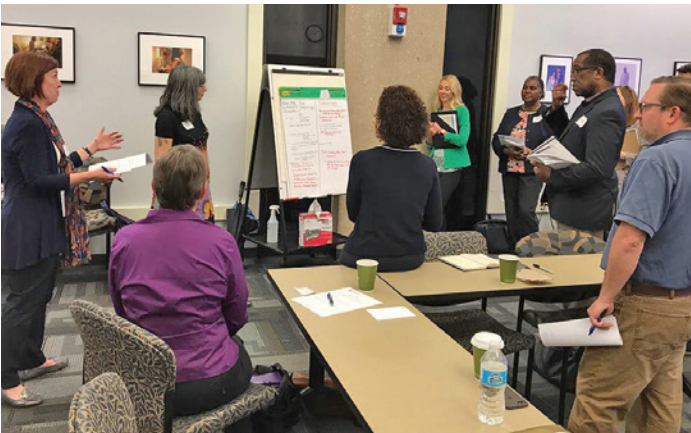
Attendees for the inaugural Higher Education Lean Exchange event

BPI Extended Team

As a shared service, BPI consists of a small core staff and extended team members scattered throughout different units in the System. Extended team membership continues to grow with each successful completion of the BPI Facilitator Training Program cohorts. These extended team members participate on select BPI projects, and project participation among members of the extended team has increased this year.

In FY17, a new project timeline was developed during the pilot for the PPMO-0065 University Procurement Source-to-Pay Process Analysis and Improvement project. Using this timeline, there are often project roles available for extended team members. The participation of extended team members has increased the speed at which BPI is able to address process improvement projects. Even if extended team members are unable to work on BPI projects, they are able to share what they've learned about process improvement, Lean, and facilitation to improve their own units. These team members also learn even more when they apply their training and are able to contact members of the BPI core staff with any questions.

Travis Ashmore

Business Analyst

PPMO-0068A Engineering IT Shared Services Accounting and Inventory Control

Facilitator

PPMO-0068B Engineering IT Shared Services Accounting and Inventory Control

Debbie Eison

Business Analyst

PPMO-0062 School of Public Health New Hire Procedures Process Improvement

Kristi Moore

Facilitator, Business Analyst, and BPI Team Lead

PPMO-0065 University Procurement Source-to-Pay Process Analysis and Improvement

Business Analyst

PPMO-0050 Employee Off-boarding Procedures Process Improvement

Cassie Tafilaw

Facilitator and Business Analyst

PPMO-0065 University Procurement Source-to-Pay Process Analysis and Improvement

Shelley Siuts

Facilitator

WR-BPI-0040 Illinois Fire Service Institute Process Analysis

Ryan Hanna

Business Analyst

PPMO-0054 Graduate College Certification Process Improvement

Training

Training Offerings

BPI regularly offers training in a variety of formats. These training opportunities are focused on educating university staff on the concepts, techniques, and tools of process improvement.

Lean Concepts

Participants learn about Lean concepts and tools that can help them uncover and eliminate unnecessary activities in their business processes, allowing them to save staff time and deliver results faster. This half-day course is provided on a quarterly basis on the Chicago and Urbana campuses at no cost to individuals or units.

Facilitation Skills

Participants develop and experiment with techniques designed to facilitate staff meetings, planning sessions, brainstorming sessions, or any type of meeting that needs to be meaningful and productive. This half-day course is provided on a quarterly basis on the Chicago and Urbana campuses at no cost to individuals or units.

Business Process Improvement Facilitator Training Program

Participants apply and, if selected, take part in this intensive four-month program designed to develop participants in the art and science of facilitating process improvement efforts in the University of Illinois System. Through a combination of classroom training, shared learning, and live project work, participants develop both the technical and leadership capabilities of great facilitators. This program is offered on an annual basis on the Chicago and Urbana campuses at no cost to individuals or units.

Community Series Seminars

These one-hour seminars provide targeted information about skills and tools to help increase efficiency of the attendees' teams and business processes. Seminar topics in FY17 included Emotional Intelligence, Kanban, and specialized facilitation techniques among others. While the Community Series started on the Urbana campus in 2014, the Chicago campus held its inaugural Community Series seminar in October 2016. The seminars are offered on a quarterly basis on the Chicago and Urbana campuses at no cost to individuals or units.

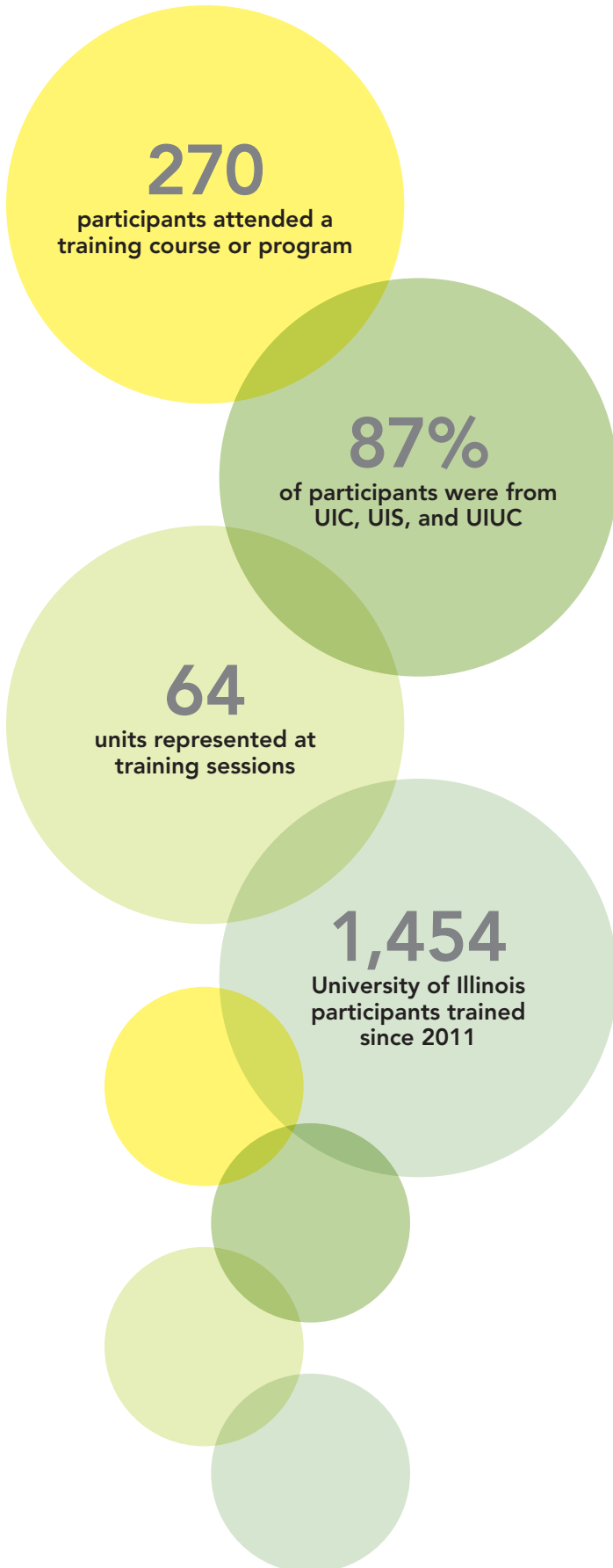*"I thought this training was remarkable."*
—ABOUT FACILITATION SKILLS

"I will use the skills that I learned in this class to make changes in my home and work habits."
—ABOUT LEAN CONCEPTS

FY17 Training Statistics

270
participants attended a training course or program

87%
of participants were from UIC, UIS, and UIUC

64
units represented at training sessions

1,454
University of Illinois participants trained since 2011

Training Survey Results

In November 2016, BPI implemented a satisfaction survey for training participants. The purpose of this survey is to learn what participants enjoyed about the classes as well as to determine areas of improvement for the courses and instructors.

98%
of respondents thought the training content was fairly to extremely relevant to their current position

94%
of respondents thought the trainer was either extremely or very knowledgeable and well-prepared

"It seemed obvious that [the trainer] has a great working knowledge of the information and techniques she was sharing."

—ABOUT FACILITATION SKILLS

"The team activities were great and allowed me to interact with people whose jobs were very different than mine and learn from them as well as the instructor."

—ABOUT LEAN CONCEPTS

Business Process Improvement Facilitator Training Program

BPI taught the inaugural Chicago cohort of the Business Process Improvement Facilitator Training Program in Fall 2016. This cohort built on the successes of the initial cohort in Urbana (held in Spring 2016), making some improvements to the four-month training program. The second Urbana cohort of this program graduated in May 2017. Once again, the participants represented a wide range of academic and administrative units from individual universities as well as from the System Offices.

This training program educates and empowers the facilitators to make positive process changes in their units and increases the overall capacity in process improvement techniques across the University System. The training supports the BPI Shared Service by developing members of the extended team of facilitators who can provide assistance and fill roles on BPI projects.

"What I liked most was that the activities were relevant and useful and actually helped you achieve results on your project."

—GRACE CASILLAS

FALL 2016 | CHICAGO

Debbie Eison
Human Resource Manager
School of Public Health (UIC)

Cindy Klein-Banai
Associate Chancellor for Sustainability
Office of Sustainability (UIC)

Jackeline Orozco
Associate Director of Billing and Collections
College of Dentistry (UIC)

Rocio Prieto
Assistant to the Executive Director of Urban Health Program
Urban Health Program (UIC)

Tareg Qtami
HR Compliance & Security Administrator
University of Illinois Hospital & Health Sciences System (UIC)

Cassie Tafilaw
Senior Business Analyst
OBFS (System Offices)

Greg Williams
Financial Analyst/Planner Supervisor
University of Illinois Hospital & Health Sciences System (UIC)

Elizabeth Ziemba
Healthcare Administrator
College of Dentistry (UIC)

SPRING 2017 | URBANA

Grace Casillas
Assistant Director
Office of Minority Student Affairs (UIUC)

Meg Edwards
Assistant Dean for Student Affairs
School of Information Sciences (UIUC)

Daniele Frerichs
Assistant Head, Business and Strategic Planning
College of ACES - Agricultural and Consumer Economics (UIUC)

Cordelia Geiken
Manager
Technology Services at Illinois (UIUC)

Wendy Harris
Assistant Director for Administrative Services
Prairie Research Institute (UIUC)

Alice Jones
Assistant Director
AITS (System Offices)

Nicholas Puddicombe
Co-Director of Patron Services
Krannert Center for the Performing Arts (UIUC)

Deborah Rahn
Director
OBFS – Student Financial Services and Cashier Operations (System Offices)

Katheryne Rehberg
Associate Director
Office of Corporate Relations (UIUC)

Sonny Thompson
IT Technical Associate
Facilities & Services (UIUC)

Theresa Whittaker
Lead Technology Support Liaison
Technology Services at Illinois (UIUC)

Graduation ceremony for members of the Spring 2017 Urbana cohort of the Business Process Improvement Facilitator Training Program

BPI Facilitator Training Program Cohort Project Info

The BPI Facilitator Training Program participants completed process improvement projects in their own units or, in the case of paired facilitators, their partner's unit. The projects covered a wide variety of improvement goals, which increased cohort members' ability to learn from each other as well as from their own experiences with facilitation and utilizing the BPI Shared Service methodology and tools. Within the next year, graduates from this program are expected to run another process improvement project in their own unit or support a BPI Shared Service project in a facilitator or business analyst role.

FY17 Cohort Project Goal Areas
Number of projects

Improve Quality ● ● ● ● ●

Save Time ● ● ● ● ●

Reduce Costs ● ● ●

Reduce Waste ● ● ●

"I also liked being given a [BPI project] framework…that is simple to follow, yet thorough to really work out issues."

—NICHOLAS PUDDICOMBE

FY17 Business Process Improvement Facilitator Training Program Projects

FALL 2016

Decrease Medicaid Denials in the College of Dentistry
College of Dentistry [UIC]

Exit Survey Process Improvement Implementation
UI Health System [UIC]

Contract Civil Service Hiring Process Improvement
School of Public Health [UIC]

Orthodontic Billing Compliance Process Improvement
College of Dentistry [UIC]

Fiscal Control and Customer Service Leave Process Improvement
OBFS—University Payroll and Benefits [System]

Hospital Patient Accounts Civil Service HR Improvement Project
UI Health System [UIC]

Integrating Sustainability into Purchasing Contracts
Office of Sustainability [UIC]

SPRING 2017

Registered Student Organization (RSO) Funding Via Corporate Philanthropic Gifts Process Improvement
Corporate Relations [UIUC]

Financial Statement Distribution to Faculty Process Improvement
College of ACES [UIUC]

iSchool Course Scheduling Process Improvement
School of Information Sciences [UIUC]

Academic Services Center Efficiency Plan
Office of Minority Student Affairs [UIUC]

Technology Services Internal Request for Expenditure (RFE) Process Improvement
Technology Services at Illinois [UIUC]

An Evaluation of Sponsored Research Processes
Prairie Research Institute [UIUC]

Inventory Control Process Improvement
Technology Services at Illinois [UIUC]

Rental and Event Billing Process Improvement
Krannert Center for the Performing Arts [UIUC]

Cash Courier Services at UIUC Process Improvement
OBFS—University Student Financial Services and Cash Operations [System]

Future Plans

FY18 looks to be another exciting year for the BPI Shared Service. The second Business Process Improvement Showcase will take place in November 2017 on the Urbana campus and will highlight a variety of process improvement success stories. Both Chicago and Urbana will host another cohort of the Business Process Improvement Facilitator Training program, in Fall 2017 and Spring 2018 respectively. We also have plans to increase our training offerings with a course on mapping processes and to continue the quarterly Process Improvement Community Series in both Chicago and Urbana. BPI core staff and extended team members will continue working on process improvement projects across the University of Illinois System.

DELIVER
deliver results for units in need so they can focus on their core mission

COLLABORATE
collaborate with partners to maximize impact of solutions

SUPPORT
support process improvement leaders and initiatives through guidance and a methodology toolkit

DEVELOP
develop a culture of quality in the University of Illinois System through training and skill development