

BPI

Business Process Improvement
Shared Service

UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

**Fiscal
Year
2018
Annual
Report**

Introduction and Highlights

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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, or reduce total cost.

Available support includes 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. The BPI Shared Service utilizes a pool of resources to provide the support of services, while keeping in mind improving efficiencies and productivity for organizations analyzing their daily operations and processes.

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.

21

Process analysis or improvement events completed in FY18

83

Process analysis or improvement events completed since 2011

336

Individuals trained in process improvement in FY18

1,790

Individuals trained in process improvement since 2011

122

Units engaged with BPI in FY18 through process events or training

192

Units engaged with BPI since 2011

\$339,500

Projected annual savings from FY18 engagements

8,053

Projected staff hours saved from FY18 engagements

Business Process Advisory Group

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.

Member Listing

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

Dilip Chhajed, Professor, College of Business (UIUC)

Cynthia Cobb, Interim Director, Portfolio & Process Management (System Offices)

Mike Kamowski, Director of Student Services Systems (UIC)

Gloria Keeley, Assistant Vice President of Business Solutions and Support (System Offices); Interim Assistant Vice President for Procurement Services (System Offices); Interim Assistant Vice President for Business and Finance (UIC)

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

Suzanne Rinehart, Assistant Provost and Director for Budget and Resource Planning (UIUC)

Angela Yudt, Associate Vice Provost, Office of the Vice Provost for Faculty Affairs (UIC)

Julie Zemaitis, Executive Director, University Audits (System Offices)

Sarah Zehr, Assistant Vice President for Academic Affairs (System Offices)

Ilir Zenku, Assistant Vice Chancellor, Information Technology, Office of the Vice Chancellor for Health Affairs (UI Health)

Projects

FY18 Completed Projects

PROJECT SATISFACTION

BPI continuously strives for improvement on all projects and solicits feedback through a project satisfaction survey. Team members from 7 projects responded to the survey saying, **85%** thought the project was either extremely or very worthwhile and **100%** thought that the facilitator was either extremely or very supportive, enabling project team members to express their thoughts and opinions in a safe environment.

- **College of Dentistry Point of Service Management (PPMO-0048):** The goal for this project was to reduce insurance and patient accounts receivable and reduce negligent write-offs on accounts receivables. Once implemented, recommendations will provide an increase in accuracy of claim submissions, an increase in collections from patients and insurance companies, and improvement within daily operations.
BENEFITS: Reduction in insurance denials, reduction in allowance for bad debt, and reduction in revenue cycle time by 15%.
- **University of Illinois Foundation Annual Giving (PPMO-0061):** The goal of this project was to reduce the turnaround time for all communication data requests. Upon implementation of the recommendations, departmental requestors will experience an increase in timely data and UIF Annual Giving's accommodation for emergency requests and staffing fluctuations.
BENEFITS: Reduce requested changes after sign off by 20% at the end of FY18



■ **School of Public Health (SPH) New Hire Procedures (PPMO-0062):**

Through this project, the School of Public Health had a goal to decrease the amount of lead time for new hire procedures, ensuring new employees are processed and on-boarded in a timely manner through streamlined best practices.

BENEFITS: 2,688 hours saved/\$115K cost avoid savings/48% overall improvement.

■ **College of Nursing HR Faculty Hiring (PPMO-0069):** The objective for this project was to create a faculty hiring process to be used by the entire UIC College of Nursing department and regional campuses. Once implemented, the recommendation will provide consistent support processes executed by all units within UIC College of Nursing.

BENEFITS: 2,176 hours saved/\$115K cost avoid savings/75% overall improvement.

■ **UIC Institutional Review Board Protocol Submission (PPMO-0069):**

The goal of this project was to reduce the amount of time spent on tasks performed by active researchers (i.e., research faculty, graduate students, undergraduate students) attempting to get approval for minimal or low risk research (e.g., surveys, etc.) while ensuring sufficient protections for the human subjects studied.

BENEFITS: Reduction in turnaround time for approvals by 15% for both Expedited Reviews and Convened Reviews by end of FY18.

■ **Central IT Biennial Inventory (WR-BPI-0042):** The purpose of this project was to map the current biennial inventory process for each University related to central IT Services, identify opportunities for improvements, create a shared understanding of the inventory process, and provide a baseline process to implement the new Biennial Inventory System.

BENEFITS: Engaged the IT Services team from all three Universities and System office to successfully map the current IT inventory process to identify areas to streamline the process consistently among each unit.

■ **Urbana Auxiliary Units FMLA Process (WR-BPI-0043):** The goal of this project was to facilitate and engage units in discussion regarding management of FMLA to collaborate on best practices.

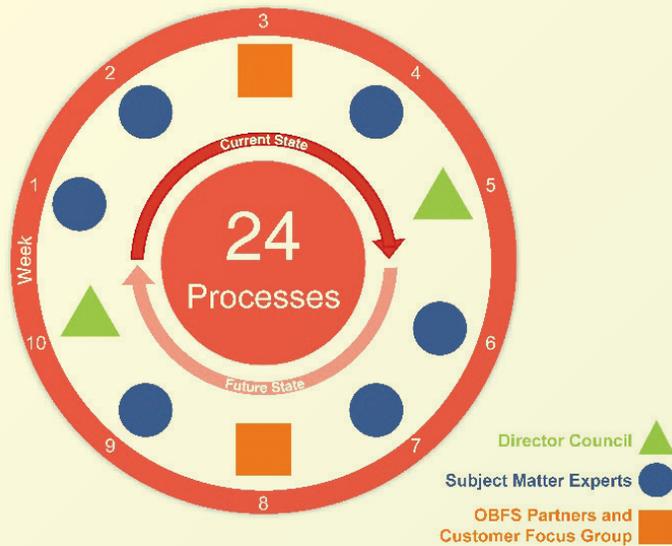
BENEFITS: Team determined best practices to utilize and manage the FMLA requests for employees.

■ **Daley Library Student Hire Process (WR-BPI-0044):** The goal of this project was to improve the customer service/application process for student applicants. Once implemented, the recommendation will reduce Library Human Resources time on manual processing, resulting in the reallocation of staff time.

BENEFITS: Successfully identified process requirements for a workflow solution transforming a manual, paper process to automation



BPI Facilitator leads a process analysis discussion with team members for the University Procurement Source-to-Pay project



Engagement life cycle for the Source2Pay's process analysis



Team members brainstorm solution ideas to resolve issues uncovered through process analysis

Featured Projects

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

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. The purpose and goal of the Source2Pay project is to analyze and improve University procurement source-to-pay procedures in support of an effort to identify and implement a streamlined source-to-pay IT solution. This project began in July of 2016, with the process improvement analysis completing in March of 2018. Each of the 26 processes identified in the Source2Pay process went through a 10 week BPI life cycle to capture the current process, identify opportunities within the process, outlined a future state, and created recommendations for improvement. Each of the 26 processes were presented at focus group meetings at each of the Universities, where feedback was incorporated into the recommendations.

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 specifications for a system-wide Request For Purchase for a new enterprise software solution that will allow for further increases in efficiency.

Library Administration Transition Procurement Process Improvement (PPMO-0070)

The Library Administration Transition Procurement Process Improvement project was initiated to have all five library locations operate with consistency and efficiency. This will be accomplished by combining all Library business-related functions and have all management, monitoring and approval oversight completed through one central business office, the Daley Library Business Office. Purchasing process categories included in the analysis were Office Supplies, IT Equipment, Library Materials and Collections, Furniture, General Services or Artistic/Professional Services and Facilities.

Through this effort, the team identified 8 recommendations that will re-establish a far more streamlined and efficient Library purchasing process. Also, the benefits analysis identified a total of 3,189 hours saved, equaling a cost-avoid savings of \$109,478 and representing a 53% improvement to the overall procurement process.

Partnerships

Events

BRINGING ADMINISTRATORS TOGETHER CONFERENCE

The BPI Shared Service had the opportunity to lead a full track of four workshops at the Bringing Administrators Together (BAT) Conference at University of Illinois at Chicago. This event is held biennially and is intended for UIC academic fiscal officers and high-level research, human resources, and business and finance related department administrators. The day is sponsored by the Offices of the Chancellor—Budget and Financial Administration and Human Resources, the Provost and Vice Chancellor for Academic Affairs, the Vice Chancellor for Research, and Business and Financial Services.

The BPI Shared Service track included the following topics:

- **Take a Walk and Lose the Waste—How to Identify Process Waste:** *A simulated activity was performed to teach the 8 common types of waste in a process.*
- **Mapping your Processes—Using Process Maps to Develop an Understanding of the Work you Perform:** *The participants learned tools to create a picture of a business process to communicate to team how the business work flows.*
- **BPI Shared Services—Helping you Save Resources:** *Conference attendees had the opportunity to learn about the project and facilitation services that the BPI Shared Service has to offer and types of projects that have been led at UIC.*
- **Panel discussion of successful projects at UIC:** *Colleagues from School of Public Health, College of Dentistry and University Library Administration shared their project experiences, successes, challenges that they had to overcome.*

Over 450 faculty and staff were in attendance for this event and a total of 130 people participated in the BPI track.

NCCI PARTICIPATION

For the past seven 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 attended the July 2017 Annual Conference. In FY18, two proposals were accepted for the annual conference. Seminars on *Aligning Culture with Methodology* and *How to Host a Day of Collaboration and Engagement: Our Story of Hosting a Higher Ed Lean Exchange*, these were held in July 2018.

HIGHER EDUCATION LEAN EXCHANGE

The second annual Higher Education Lean Exchange (HELEX) event was held at the University of Notre Dame on May 15, 2018. This event, sponsored by NCCI, was intended as a day for Lean practitioners in higher education to collaborate and exchange ideas. Discussion topics included a Design Thinking Workshop, Best Practices, Challenges, and Opportunities.

Twenty Lean practitioners attended this event, representing the following institutions: Michigan Technological University, St. Louis University, University of Illinois, University of Michigan, University of Notre Dame, and Wayne State University.

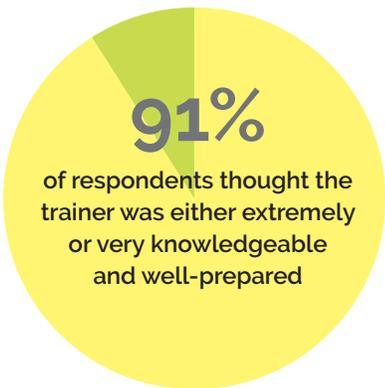
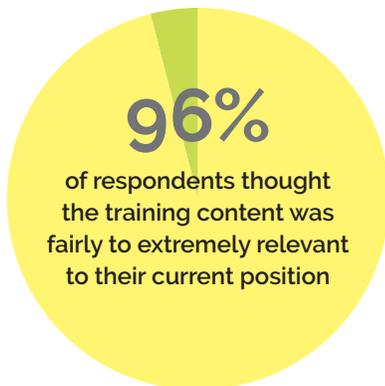


Attendees at 2nd annual Higher Ed Lean Exchange

Training

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.



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.

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.

FY18 TRAINING STATISTICS

336

participants attended a training course or program

70

units represented at training sessions

1,790

University of Illinois participants trained since 2011

24%

increase in training participants from FY17 to FY18



Training participants learn about Six Thinking Hats during Facilitation Skills Course

What We're Hearing About BPI

Comments about Facilitation Skills

“What I liked most about the facilitation skills training was being able to apply some of the skills covered during the final exercise. Also, learning from the experience of the primary facilitator and participants during the discussion was extremely valuable.”

“I really appreciated the role play at the end. It was very helpful to actually use the tools we learned about in front of the trainer. It was a very useful combination of presentation and activities.”

“I thought it was a great session and [the trainer] gave valuable tips and tricks for facilitating in any situation.”

Comments about Lean Concepts

“This was perhaps the most useful training I have attended—ever! I left there feeling like there were things that I could implement right away, both at work and at home. The activities were fun and encouraged participation and questions.”

“This was a great training for all skill levels!”

“I enjoyed the activities we did in this class. It allowed me to see how using the Lean Concepts can help the processes I use in my department can change for the better.”

Future Plans

For FY19, BPI core staff and extended team members will continue working on process improvement projects, and provide facilitation and training services across the University of Illinois System.

During the upcoming FY19, our objective is:

Expand the
COLLABORATION
with the University of Illinois
System increasing the
efficiency and effectiveness
of University operations.



Enhance training
services we
DELIVER



Continue to use the RAPID
methodology to
SUPPORT
projects



DEVELOP
and begin offering
Kaizen event facilitation

This new service will allow units to focus on one specific area that is in need of immediate process improvement action (1-3 days) and can be done alone or as part of a larger process improvement project. It will leverage Notre Dame's MOVE process but customized for the University of Illinois



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