Who is Your Customer? Using Customer and Staff Surveys to Make Real Change

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Introductions

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“Without data you’re just another person with an opinion.”

- W. Edwards Deming, Data Scientist
UC San Diego’s Survey Program Evolution

1993 – 16 Business Affairs units begin using the balanced scorecard approach.

1994 – Customer Satisfaction Survey

1995 – Student Satisfaction Survey

1997 – Staff Climate Survey

1999 – Surveys expand to all campus.

2003 – Surveys go online.

2004 – First study on diversity and staff satisfaction.

2007 – Scalable advanced analytics and reports.

2011 – UC San Diego inducted into Balanced Scorecard Hall of Fame.

2012 – UC San Diego’s 1st strategic plan.

2014 – Surveys are fully scalable.

2015 – Benchmarking Program Begins.

Surveys provide actionable data for continuous improvement initiatives and in support of the campus strategic plan.

Best practices and benchmarking opportunities with other institutions.

Customer service, department outreach, and efficient internal processes are an expectation and norm.

Surveys provide actionable data for continuous improvement initiatives and in support of the campus strategic plan.

Key Performance Indicators identified and benchmarked.

Mission and vision aligned with strategy.

UC San Diego – VC Business Affairs

1994-2004

UC San Diego – All Campus

2005-2014

UC San Diego and beyond...

2015-beyond

Balanced Scorecard

Customer Perspective: How do our customers benefit from our services?

Internal Process Perspective: Are we producing quality outputs efficiently?

Innovation & Growth Perspective: Are we meeting our objectives and achievements?
IT'S ALL ABOUT THE DATA
IT'S ALL ABOUT THE GOOD USING THE GOOD
Surveys allow a way to understand people’s attitudes, feelings, and behaviors.
Four main reasons to survey customers

1. Identify and fix

2. Assess the performance

3. Improve processes

4. Understand needs for a better overall experience
Q. Why do administrative support areas survey in a university setting?

A. We should know if we are helping to support the mission of the university.

- **Did we help a researcher spend more time in his or her lab** (i.e., rather than track down policies and fill out confusing forms)?

- **Did we help a faculty member concentrate their efforts toward their student’s learning** (i.e., rather than hours spent on processing administrative paperwork)?

- **Did we enhance a student’s overall experience** (i.e., rather than stressing them with red tape, hoops, and waiting in lines)?

- **Did we help an administrator focus on their most mission critical work** (i.e., rather than getting bounced around from desk to desk to get an issue resolved)?

How would a leader know if he/she is meeting these needs?
Customer Perspective

Faculty and Staff Customer Satisfaction Survey
Student Satisfaction Survey

Overall satisfaction?
Are we courteous, knowledgeable, and available to you? Where should we improve?

Meeting your needs?
Are we helping you spend more time on your research, with your students, on mission critical work?

Holding ourselves accountable.
We want to hear from you, we will take action on your input, and we will communicate our changes per your feedback.
Methodology – Design Customer Satisfaction Survey

- Standard 8 rating questions
  1. Overall satisfaction
  2. Understands my needs
  3. Accessible
  4. Responsive
  5. Resolves issues
  6. Knowledgeable/professional/courteous, etc.
  7. Effective use of (info sharing website)
  8. Moving in positive direction

- Stop, save, and finish later
- Confidential responses
- All staff and faculty (and students) invited
- Statistical significance testing of trends
- Message: Help us help you fulfill the mission of the university

**Trend analysis:** “When” over time

**Heat maps** to identify “Where” should we dig deeper

**Drill downs to know which departments to focus your outreach or study best practices:** “Who” needs attention

**Correlational analysis**

to identify drivers of satisfaction and start the conversation of “Why” are the scores varying

Focus on the “Primary Opportunities” quadrant
Customer Perspective: Continuous Improvement opportunities

Strengths & Opportunities Scatterplot by Question

- Courteous
- Knowledgeable
- Proposal Timeliness
- Award
- Web Effective
- Understands
- Accessible
- Moving
- Responsive

Primary Opportunities
Secondary Opportunities

Influential Strengths

Correlation
Mean

Strengths
Customer Perspective: verbatim comments; “voice of the customer”

**Examples:** Turnaround time for processing contracts and grants

- “I realized that there has been a big staff turnover in the past 6 months and I think the services would be improved when all the new staff are trained. Just some bad experiences the past 12 months, waiting on proposals for 6 months without processing them or referring them to another area is unacceptable.”

**Examples:** Better information, communication, and responsiveness

- “I have also noticed that the communication recently has suffered. We were used to having ____ forward communications from the agency to the department contacts but it does not seem like that is happening consistently.”
- “Immediate introductions (via email) of the staff overseeing a particular contract please. Provide estimated timelines.”

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<td><strong>96</strong></td>
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Innovation and Growth (ie People) Perspective

Staff@Work Survey:

Overall satisfaction with your institution?
Would you recommend others to work here?

Meeting your needs?
• Overall Leadership
• Supervision
• Department Effectiveness
• Employee Success

Holding ourselves accountable.

We want to hear from you, we will take action on your input, and we will communicate our changes per your feedback.
Methodology – Design Staff@Work Survey

- Tested for internal reliability, conducted **Factor Analysis**

- 53 questions measure 6 dimensions:
  - University overall
  - Department effectiveness (diversity, mission)
  - Supervisor effectiveness
  - Employee effectiveness

- Equity, diversity, and inclusion questions for comparisons

- Regression analysis to predict what drives satisfaction

- Message: How can we optimize your work climate?

“**Yes, it really is Anonymous**”😊

- 5,140 respondents; 64% campus-wide
- <1.0 Margin of Error
Using the Staff@Work data to improve

Descriptive statistics

Strength & opportunity analysis: These are the items where people are saying, “I am not as happy about these things and they are also very important drivers of my satisfaction”

Correlational analysis to identify drivers

Arrows indicate positive or negative movement and *statistical analysis inform you of significant trends
Interactive reports with Tableau

Correlation Scatterplot

Strengths

Influential Strengths

09 Understand Dept's Mission
49 Know How To Use Tools
47 Get Information
03 Faculty Value Contributions
16 Have Tools
25 Resolves Staff Issues
15 Adequate Staffing
46 Salary and Benefits

Category
Dept - Diver..
Dept - Missi..
Dept Effectiv..
Employee Ef..
Satisfaction..

Avg. Response
3.5

Year
2011
2012
2013
2014
2015

07 Have Voice on Campus
08 Career Advancement

Secondary Opportunity

Primary Opportunity

Correlation with Overall Satisfaction

Avg. Corr: 0.45
Benchmark with other institutions

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Cohort:
- UC Irvine CFT
- UC San Diego
- UCR Bus & Ad
- Cal State CO B.

Satisfaction Question 10: Positive Direction

UC Riverside - Business & Administrative Services; UC San Diego - Academic Affairs, Advancement, Chief Financial Officer, Research Affairs; Resource Management & Planning, Student Affairs; UC Irvine - Office of Information...
UCR Business and Administrative Services

Who we are

UCR Total Enrollment: 22,921
Faculty: 852 (Ladder Rank, LSOE, Clinical)
Staff: 2,939 (5,277 including students)
Total Community Population: 26,166

BAS June 2017
Staff: 558 (19%)
Student Empl: 1,043 (45%)
Total: 1,601

- Human Resources
- Auxiliary Services
- Enterprise Risk Management
- Business & Financial Services
- R’ Shared Service Center
- Office of the Vice Chancellor
UCR Business and Administrative Services
Survey History – Employee Engagement

2014 – BAS’ First Survey Experience - In-House Effort
• Survey Monkey and paper surveys
• Committee composed of representatives from all departments
• Extremely manual reporting process
• 84% response rate – 391 responses of 497 invited

2015 – Collaborative Engagement With UCSD
• Interactive process with UCSD Team
• Expert support throughout process
• Confidence in anonymity and confidentiality for survey takers
• 71% response rate – 597 responses of 843 invited (population increased over 2014 due to addition of Auxiliary Services unit)

2016 – Collaboration Continues
• 68% response rate – 596 of 873 invited
• Increased accountability for action plans and follow-up
UCR Business and Administrative Services
Survey History – Client Satisfaction

2015 – In-House Effort
• Adobe FormsCentral
• Committee of 9 with 5 Advisors and Support Staff
• Risk of multiple submissions
• 2% Campus-wide Participation Rate – 529 of 25,201 invited

2016 – Collaborative Engagement with UCSD
• Interactive process with UCSD Team
• Expert support throughout process
• Confidence in anonymity and confidentiality for survey takers
• 9% Campus-wide Participation Rate – 2,284 of 25,631 invited

2017 – Planning in Process
## Employee Engagement Survey - Making it Meaningful

- Survey Action Plans
- Periodic Updates
- Shift to Surveying in Alternate Years

### Focus Area: Satisfaction with UCR DAS

| #7 - Have voice on campus | Although there were minor changes in these two areas, they seem to resonate in many of the other faculty surveys. We will target both of these areas during our leadership meetings and staff meetings. Our department started working on Pathways to Promotions with Facilities Services (Baker and it stalled). We've committed to get it active again as this could be a significant program for represented staff to assist them with future development opportunities. Additionally, we will begin to formalize a succession planning plan for 2017. |
| #8 - Career Advancement |

### Focus Area: Department Effectiveness

| #25 - Better Ways Recognized | We have created a new Auxiliaries Recognition program, which is replacing the OZ program in Dining. There was a linkage between the two programs which is likely why this area dropped compared to 2015. Although the OZ program focused solely on personal accountability, our 5 year efforts are not lost. The new program now focuses on 4 key areas, as follows: Expertise — Personal Accountability — Teamwork — Memorable Service. |
| #26 - Suggestions for Improvement |

### Focus Area: Supervisor Effectiveness

| #68 - Suggestions for Improvement | The statement is - my supervisor gives me useful suggestions for improvement. We will focus on further developing our leadership team in areas of mentoring and coaching their subordinates. This will require us to be more mindful of IDPs and Improvement Plans for our supervisors and managers. Last summer, we launched Dining Excellence that focuses on 4 key initiatives: People, Processes, Resources and Swedes. The People initiative focuses on training, development and on-boarding all of which will help address improvement. |
| #38 - People Update | Dining Excellence - People Update: Tracking of training hours is underway and our revised on-boarding initiatives will pilot in Spring quarter of 2017 for all new hires. |

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**Unit Name:** Dining, Catering & Conference Services
UCR Business and Administrative Services
Continuous Improvement & Outcomes

Client Satisfaction Survey –
Customer Service Enhancements as a Result

• Human Resources
• Auxiliary Services
• Business & Financial Services
• Enterprise Risk Management
Balanced Score Card

C1. Easy to do business with by improving the customer experience by providing opportunities for increased feedback and collaboration.
S1. Increase employee engagement, morale, and workplace satisfaction

**People (BAS People)**

- **Build Organizational Capacity**
- **Develop Culture of Excellence**
- **Achieve "Best Employer" Status**

### Balanced Score Card

**People**

1. **Employee retention**
   - Literature review of employee retention trends
   - Annual employee retention survey

2. **Employee professional development**
   - Annual review of professional development opportunities

3. **Employee engagement**
   - Annual employee engagement survey

4. **Staff with certifications**
   - Annual certification review

5. **Staff with advanced degrees**
   - Annual review of advanced degree completion

### Accountability Measures

- **Annual performance management process**
- **Annual budget process**
- **Annual audit process**

### NCCI Commitment

- **Transparency**
- **Collaboration**
- **Integrity**
- **Commitment**
- **Safety**
Inclusiveness & Empowerment

• Outreach
• Computer Labs/Training
• Spanish Translation
Who We Are

- Office of Information Technology, UC Irvine
- Consolidated technology support 2009
- 350 staff supporting 10000 faculty/staff, 40000 students
- Every level from phone/network to the cloud
What We Did

- New Assistant CIO recruited from UCSD
- Knew of UCSD efforts, suggested collaboration
- “Balanced Scorecard” – research-based survey & analysis
- Target: satisfaction with IT services & support teams
- ... and opportunities for improvement
How to win the improvement game

- Choose a good tool
- Design around desired results
- Believe your data then invent the story
- Transparency
- Take action
Results you can use

- overall satisfaction scores
- a brief textual analysis of results including highlights from the free-form comment fields
- satisfaction ratings for various aspects of that team’s customer service
- a sophisticated statistical analysis suggesting the areas in which we should continue to excel and the areas where improvement would make the biggest impact on our customers
- a breakdown of ratings for the team by the organizational unit of the respondent (but no more than that – the survey was confidential)
- a list of all the free-form comments.
2016 Customer Satisfaction Survey - Help Desk/Desktop Support

Highlights:

• 617 individuals rated this area.
• Average of the six standard satisfaction questions: 4.15 (Scale 1-5).

Strengths:
All satisfaction mean scores are in the excellent range (4.0 or greater). The goal is to sustain excellence in all areas.

Verbatim Comment Highlights:
• Cordial, professional, and efficient staff.
• Improve training to route issues to the right person.
• Phones are answered promptly, but knowledge of staff is uneven.
• Provide continuous email thread for service status updates.

Overall Satisfaction:
- Very/Extremely satisfied: 81%
- Neutral: 14%
- Not very/Not at all satisfied: 5%

Means = 4.16
Std Dev = .893
n = 610
Satisfaction Mean Scores - Service Desk - Help Desk/Desktop Support

n = 617

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Background:

- 2015 was the first year OIT participated in the annual survey.
- Survey period: Feb. 9 to Feb. 29, 2016
- Twenty-eight (28) OIT service areas were rated.
- 9,965 academic personnel and staff were invited to participate in the survey.
- 12% (1,207) responded to the survey.
- Each survey area consisted of 6 to 8 standard satisfaction questions and 1-2 supplemental questions (optional).
- One standard verbatim comment box enabled participants to provide feedback on how to provide better service. Some areas had one additional comment box. Participants were also asked to include their UCNetID if they wanted to be contacted regarding their comments.
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<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>BIO SCI/FINANCE &amp; PURCHASING</td>
<td>3.50</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>BIO SCI/PERSONNEL</td>
<td>3.00</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Organization-wide results

- Comparative satisfaction with systems and services
- Comparative strengths and opportunities among the teams
UCI CSS System Satisfaction Mean Scores, 2016

Scale (1, Lo - 5 Hi) Below 3.0 - Low | 3.0 - 3.5 Marginal | 3.6 to 3.9 Good | 4.0 & above - Excellent

NCCI
## Office of Information Technology - University of California, Irvine
### Faculty & Staff Customer Satisfaction Survey 2016
#### Strengths & Opportunities Summary

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Idea Score</th>
<th>Understanding My Needs &amp; Requirements</th>
<th>Assembly (via phone, voicemail, email, etc.)</th>
<th>Resolving Problems Effectively</th>
<th>Providing Effective Online Documentation</th>
<th>Making Changes in a Process That Meets My Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIT Accounting &amp; Fiscal, Financial Systems</td>
<td>4.18</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Admission &amp; Relations with Schools</td>
<td>4.33</td>
<td>Primary Opportunity</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>CIT Classroom Technology</td>
<td>4.77</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>Electronic Educational Environment (EEE)</td>
<td>4.73</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>CIT Exchange/Office 365</td>
<td>4.08</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>FACILITIES Management</td>
<td>4.30</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Phone/IM &amp; Campus Collaboration</td>
<td>4.94</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Financial Aid IT</td>
<td>4.99</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Financial Services</td>
<td>4.07</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Graduate Division IT</td>
<td>4.13</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Help Desk, Device Support</td>
<td>4.06</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Human Resources IT</td>
<td>4.02</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Information Security</td>
<td>3.90</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Radio/Telephone System, Decision Support</td>
<td>4.03</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Network Operations</td>
<td>4.10</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>Office of Research IT</td>
<td>3.90</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Research Computing Support</td>
<td>4.02</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Server &amp; Backup</td>
<td>3.84</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Software Licensing</td>
<td>4.07</td>
<td>Influential Strength</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td></td>
</tr>
<tr>
<td>CIT Telephone &amp; Videocon</td>
<td>4.02</td>
<td>Secondary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>Transportation &amp; Distribution Services IT</td>
<td>4.23</td>
<td>Strength</td>
<td>Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>UCI Credit</td>
<td>4.24</td>
<td>Influential Strength</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Influential Strength</td>
<td></td>
</tr>
<tr>
<td>UCI Identity &amp; Access Management</td>
<td>4.44</td>
<td>Influential Strength</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>UCI web Content</td>
<td>4.31</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
<tr>
<td>Institutional</td>
<td>4.02</td>
<td>Secondary Opportunity</td>
<td>Secondary Opportunity</td>
<td>Primary Opportunity</td>
<td>Secondary Opportunity</td>
<td></td>
</tr>
</tbody>
</table>

### Scale (1 to 5) - Below 30: Low (30-35 Marginal) 36 - 50: Good & Above Excellent

Strengths & Opportunities are defined by statistical analysis to identify drivers of overall satisfaction.

<table>
<thead>
<tr>
<th>Influential</th>
<th>High Access, Important to Client</th>
<th>Primary Opportunity</th>
<th>Secondary Opportunity</th>
<th>Lower Scores Important to Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength</td>
<td>high access, less important</td>
<td>secondary</td>
<td>primary</td>
<td>lower scores less important</td>
</tr>
</tbody>
</table>
Now what?

- “We’re listening” – candid disclosure of results
- “We heard you” – changes we are making in direct response to survey
- Promotion of next cycle – more participation
2016 OIT Customer Satisfaction Survey

AUDIENCE
Sent to 9,965 UCI Faculty & Staff
12% Response Rate (1,207)

METHODOLOGY
Confidential On-line Survey
Email Invitation – February 2016

AREAS EVALUATED
28 Service Support Areas
6-8 Standard Questions
1-2 Supplemental Questions
93% Rated as Good or Excellent

83 Applications & Systems
90% Rated as Good or Excellent

Top Technology Used on Campus for University Business

Top Device ________ PC Desktop (99%)
Top Mobile Device ________ iPhone (49%)
Top Browsers ________ Firefox (38%) & Chrome (38%)
Top Email Client ________ Outlook (43%)

We’re Listening
OIT leadership is analyzing the results to develop a plan for the next fiscal year. Areas that appear to need special attention will be prioritized and a general plan for making improvements is being developed.

We Heard You

Changes OIT is making based on YOUR feedback from the 2016 Customer Satisfaction Survey

<table>
<thead>
<tr>
<th>Feedback</th>
<th>What OIT is Doing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Search in ZotPortal</td>
<td>We are investigating predictive search to see if this is possible and feasible. We are running weekly reports of top search terms and adjusting key matches accordingly.</td>
</tr>
<tr>
<td>Streamline Security Requests</td>
<td>We have created new ServiceNow request forms to simplify requesting services and improving communication with the OIT Security Team.</td>
</tr>
<tr>
<td>Complexity of KFS</td>
<td>KFS Training Classes</td>
</tr>
<tr>
<td></td>
<td>The Accounting department holds regular in-person training classes in addition to online training. Registration is available through UCLC.</td>
</tr>
<tr>
<td>More Self Help Information</td>
<td>We will be consolidating all of our knowledge base articles in ServiceNow and will make them easy to find on the OIT website.</td>
</tr>
<tr>
<td>Improved Software Licensing information</td>
<td>We will create knowledge base articles with public licensing information making them easier to find and keep up to date.</td>
</tr>
<tr>
<td>Default Employee Email Delivery</td>
<td>New employees no longer have Enterprise Services (IMAP) email accounts created as the default. They may now choose from available options.</td>
</tr>
<tr>
<td>Simplify Service Requests</td>
<td>We’ve made VoiceMail Pascode Reset requests easier with a direct ServiceNow form. More request forms are in development.</td>
</tr>
</tbody>
</table>
CSU Chancellor’s Office, Business & Finance Division

- Approximately 300 employees
- B&F provides services to all 23 CSU campuses as well as CO staff
- Adopted the Balanced Scorecard in April, 2015
- Partnered with UCSD in May, 2015 to manage surveys
- Now in third year of survey usage
- Staff@Work Survey – Opened 8/30/16 and Closed 9/30/16
- Customer Satisfaction Survey – Opened 10/24/16 and Closed 11/18/16
CSU Chancellor’s Office, Business & Finance Division

• Results received in February, 2017
• Data given to Senior Leadership Team in March, 2017
• Survey results posted to intranet in April, 2017
• 2-day Executive Vice Chancellor Summit held in June, 2017
  • Facilitated by Angela Song, UCSD
  • Each Senior Leader presented their results and action plans
Business & Finance Balanced Scorecard

Staff Perspective - Staff@Work Survey

The Business & Finance Staff@Work Survey is the primary tool used to measure the staff perspective. It asks staff to rate various areas of the organization on perceptions of the work environment. The survey allows management to better understand the pulse of Business & Finance.

Survey Questions

To systematically track and quantify staff perceptions of climate in the Chancellor’s Office Business & Finance Division, a set of climate questions for the Staff@Work Survey was created to specifically ask about work climate, including behaviors and attitudes experienced at work, and provides an anonymous way for people to self-identify their ethnicity, gender, sexual orientation, and other demographic categories. The results from the Staff@Work Survey enable B&F, the Chancellor’s Office, and the Staff@Work Survey project to establish a climate baseline for their respective units, implement department specific interventions, and track progress.

View all Staff@Work Survey Questions.

About the Survey

2016-17 Staff@Work Survey Results

Business & Finance Divisional Results

81% of people say their supervisor is SUPPORTIVE when personal issues arise

88% of people say they are a SATISFIED or EXTREMELY SATISFIED B&F employee

79% of 225 people in B&F TOOK THE SURVEY

APPLAUSE!

Following are the highest scored items in the survey

4.3 out of 5.0

All Cultures Treated Fairly
Contribution to CSU’s Mission
Physically Safe Environment
Supervisor Treats with Respect
Enjoy Working with Coworkers

98% of B&F departments took the survey with 24 units reaching 100% participation!

The THREE TOP STRENGTHS of B&F:
1. Sexual Orientations Treated Fairly
2. Supportive of Personal Issues
3. Contribution to Department’s Mission

The THREE TOP CHALLENGES of B&F:
1. Salary and Benefits
2. Adequate Staffing
3. Career Advancement

What Are We Doing With The Results?

Actions taken based on feedback received in the survey include engaging in “town hall” staff development forums, creating staff safety recognition programs, developing departmental mission statements and goals, providing staff with internal/external skills and leadership training opportunities, and including departmental goals in staff performance appraisals.

View the 2016-17 Staff@Work Survey Results.
Staff@Work Survey

**Statistically Significant Improvements:**

- Overall Satisfaction 3.83 → 4.07
- Establishes Annual Dept Goals
- Measures Dept Goals
- Measures Customer Satisfaction
- Adequate Staffing
- Work Assigned Equitably
- Appropriate Stress
<table>
<thead>
<tr>
<th>Primary Opportunities</th>
<th>Improvement efforts</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Valued Member of CO</td>
<td>→ Recognition programs; professional development</td>
</tr>
<tr>
<td>• Career Advancement</td>
<td>→ Promote from within</td>
</tr>
<tr>
<td>• Have a Voice</td>
<td>→ More all staff meetings; implement “Idea Boards”</td>
</tr>
<tr>
<td>• Salary and Benefits</td>
<td>→ 3rd party assessment of salaries</td>
</tr>
<tr>
<td>• Measures Dept Goals</td>
<td>→ Adding dept goals to performance appraisals</td>
</tr>
</tbody>
</table>
Customer Perspective - Customer Satisfaction Survey

About the Survey

The Business & Finance Customer Satisfaction Survey (CBS) is the primary tool used to measure the customer perspective. It asks Campus and Chancellor’s Office customers to rate their contact center agents and services in the Business & Finance Division in the areas of time, quality, performance, and service. With this information, departments are better able to understand the needs of their customers and focus on improving customer service.

The survey includes 13 standard and 1-3 supplemental questions and is used to rate all areas of the Business & Finance Division. Areas are rated 1-5, with 5 being the highest score. The survey respondents are able to provide comments and offer suggestions to individuals that have provided excellent service.

View the 2016-17 Customer Satisfaction Survey Questions.

2016-17 Customer Satisfaction Survey Results

Business & Finance Divisional Results

<table>
<thead>
<tr>
<th>Department</th>
<th>Standard</th>
<th>Supplemental</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Planning, Design, &amp; Construction (CPDC)</td>
<td>39</td>
<td>0</td>
</tr>
<tr>
<td>Contract Services &amp; Procurement (CSBP)</td>
<td>788</td>
<td>0</td>
</tr>
<tr>
<td>Financial Services (FS)</td>
<td>4.0</td>
<td>0</td>
</tr>
<tr>
<td>IT</td>
<td>18</td>
<td>0</td>
</tr>
<tr>
<td>Information Technology Services (ITS)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Office of the President (OP)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Strategic Initiatives &amp; Support Services (SIES)$</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Systemwide Budget Office (DBO)</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Fourteen B&F departments achieved a rating of Excellent Customer Service (4.0 and higher) on the 2016-17 Customer Satisfaction Survey.

What Are We Doing With The Results?

Actions taken based on feedback received in the survey include creating a CNI Incentivation Process ("CNI Fast Track") to speed up network upgrades and reduce costs, creating intuitive online resources on CalState.edu and CFSnow websites, improving response times, increasing campus visits to better understand their processes, improving the State Fire Marshal review process, and integrating Greenhouse Gas projections into the 2017-18 Capital Improvement Plan.

View the 2015-16 Customer Satisfaction Survey Results.
Customer Satisfaction Survey

Campus Customers Say....

Strengths: Knowledgeable and Helpful

Primary Opportunities: Understands Needs, Effective Support and Advice, Facilitates Problem Resolution

Common Themes:
“Communicate More...”
“More Transparency...”
“Specific Training...”
“Streamline Processes...”
“Be Open to New Ways...”
Summary

• You can effect real change if ...
• You really want to improve
• You take good measurements
• You believe your data
• You recognize this is lap 1 of a long race
• Network – there is talent out there!
Thank you!

Who has the first question?
Contact us!

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