

The TEAM Initiative: Tufts Effectiveness in Administrative Management

June 2015

Administrative Process Integration

Summary

With TSS and IT Integration now in place and the new Budget Center and Research Administration systems preparing for implementation, the next TEAM effort will concentrate on redesigning some of the university's common administrative processes. The goal is to simplify these procedures and to reduce the overall time and effort it takes to transact business at Tufts.

Tufts Administrative Process Integration Project: The Next Stage of TEAM

Implementation of the Tufts Effectiveness in Administrative Management (TEAM) initiative began in June 2014. In the past year, new organizations, such as Tufts Support Services (TSS) and IT Integration, have launched. Others, such as the Budget Center and Change Collaborative for Research Administration, are preparing to go live.

With these foundational pieces in place, we are positioned to work with schools and divisions to make it easier to conduct Tufts business. **The TEAM Administrative Process Integration (API) Project** will tackle outdated, duplicative processes and simplify administrative tasks so they require less time, are easier to track, and better serve the Tufts community.

The API project team is comprised of a cross-functional group of TEAM leaders who are working with Deloitte consultants to examine current processes and opportunities for improvement. This group is using input gathered during the TEAM assessment phase and meets regularly with advisors from the Budget Center, TSS and other TEAM-related organizations, Faculty Affairs, and schools and departments for input and guidance.

During the summer of 2015, the TEAM Steering Committee will prioritize which processes and systems to address first. We anticipate some of these improvements will be implemented in fiscal year 2016, with other, longer-term initiatives completed in the following year.

Why We Need Administrative Process Integration

API aims to solve the process issues that affect many members of the Tufts community. Information is scattered across various departments and unless you know where to look or whom to ask, you will struggle to find the answers you need. Anyone new to Tufts, or who only seldom performs a given task, typically spends an inordinate amount of time trying to figure out what the proper steps are.

Many administrative processes at Tufts involve a long and complicated series of transactions. For example, when an employee resigns submitting a personnel action form (PAF) requires numerous steps within a school and multiple steps within Human Resources. Because the current PAF is a manual form, there is no way to verify signatures and no audit trail unless you take the time to create one. Unless you follow up by phone or email, you may not receive confirmation when the PAF is complete. The goal of API is to dramatically simplify the process while also ensuring transparency and the ability to monitor progress.

In a preliminary assessment, we identified 327 potential administrative transactions, both manual and system-based, across the five areas that comprise TEAM (Figure 1). Many of these transactions are necessary, but because they have developed independently over time, they each represent an opportunity to improve the way Tufts handles administrative activities.

Administrative Transactions at Tufts

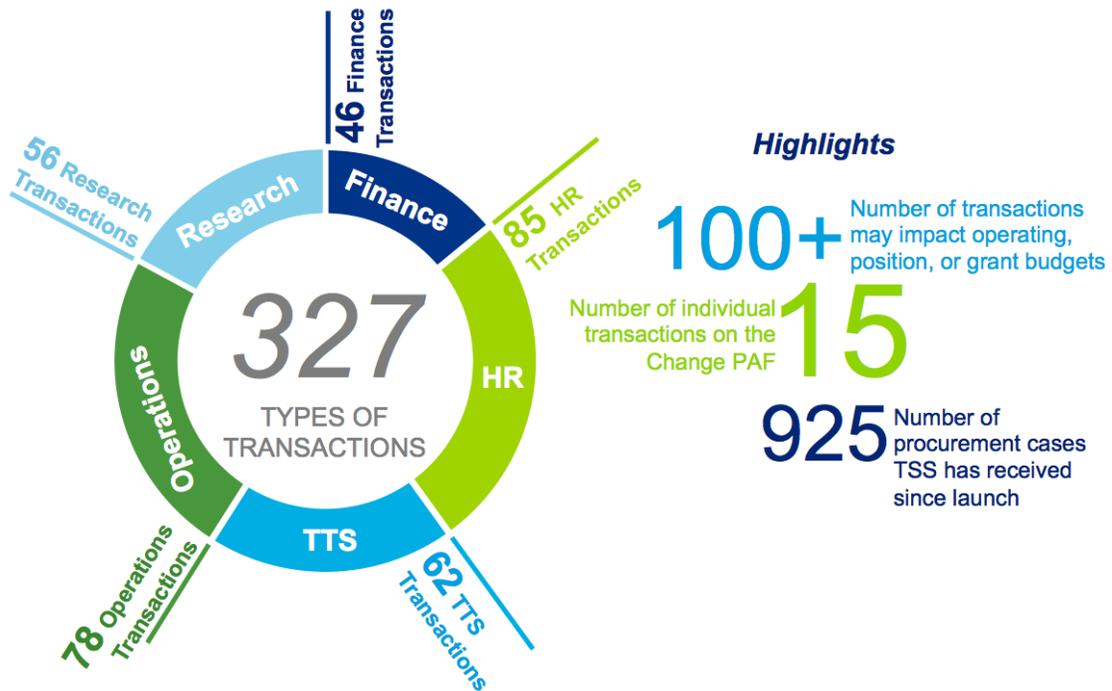


Figure 1: Administrative transactions include forms, requests, consultations and online actions.

The problems with our current processes typically stem from one or more of the following issues:

1. Related functions and approvals are carried out in multiple silos across schools, divisions and Central Administration.
2. Some processes have not been updated to reflect the way Tufts works today. For instance, paper copies should not be necessary given that email and other electronic systems create an automatic audit trail.
3. In many cases, the technology used to manage a process is not well suited to the demands of that process.
4. There are too many designated approvers. In reality, many of those designated only need to be informed of an event or transaction.

Further complicating matters, the steps to initiate a transaction vary widely. In some cases, you need to fill out a Word document or PDF form, while other transactions may require you to enter information into a web-based form or make a phone call (Figure 2).

Methods of Initiating Transactions

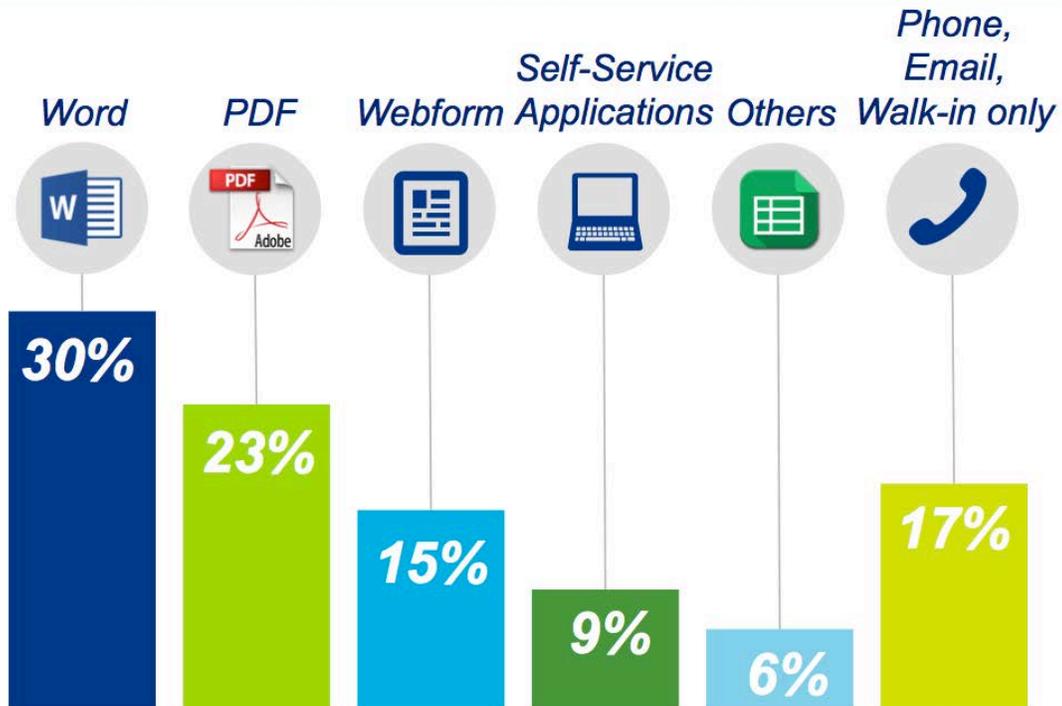


Figure 2: Over half of all transactions at Tufts require a Word or PDF form.

Among the hundreds of administrative transactions identified, over half are set into motion when an individual submits a Word or PDF form. Such manual forms can easily get lost, require end-users to fill in the same information repeatedly and leave no trail that can be tracked without the extra step of a phone call or email. Many processes also require multiple levels of approval, adding significant time and work to even the most straightforward processes.

Improving Administrative Processes

With new structures such as TSS and the Budget Center in place or soon to launch, Tufts can now address the processes that these groups handle, and how they overlap. We now have the opportunity to use new tools to change the PAF process and others like it in ways that we could not before.

API aims to achieve the following objectives:

Clarify roles and responsibilities — Rather than requiring multiple approvals for a single transaction, API will significantly reduce the number of approvals required while ensuring that appropriate people are notified so they can respond or prepare accordingly.

Coordinate processes —Tufts’ current administrative processes will be standardized and coordinated. Transactions of a similar nature will be organized into sets of consistent steps and approvals, no matter which groups or departments are involved.

Use technology strategically — As part of the current initiative, we will be looking at how Tufts uses its current technology investments and whether those systems can be used more strategically. Beyond the obvious step of automating manual forms, we will be looking at how we can integrate software applications so that common data such as employee IDs and contact information or department ID numbers can be shared among systems. This will reduce time spent on data entry, improve data quality and present data in a way that informs subsequent action.

API: Define and Planning Stage

The API project is at an early stage of planning. Now that we have identified existing administrative transactions at Tufts, we are determining which processes we will address first and the probable impact on staff, faculty and students. We are also looking at how Tufts’ technologies and the current roles and responsibilities for various administrative functions can be redesigned to enhance efficiency (Figure 3). At the completion of this stage, we will assign timeframes to the subsequent steps.



Figure 3: Approach for the API Project

Impact on the Tufts Community

Much of the work of API may not be directly visible to many Tufts faculty and staff, but some examples of tangible impacts may include fewer signatures and approvers required on a form; manual forms replaced by electronic forms; and more user-friendly technology. Ultimately, it will take significantly less time to complete a variety of administrative tasks.

Community Involvement

The API project team is currently conducting workshops with subject matter experts and members of the community to identify the underlying causes of unnecessary administrative delays. We are also using these workshops as a collaborative forum to gather suggestions on how to simplify and improve processes.

In the months ahead, we will continue to seek input from Tufts faculty, staff and student employees in order to gain further insight into cumbersome or confusing administrative processes and possible solutions.

Please let us know what you think. You can email us at TEAM@Tufts.edu, or share your thoughts anonymously through the online [Community Input](#) form.