

## The TEAM Initiative: Tufts Effectiveness in Administrative Management

April 2015

TEAM Progress Report

TEAM has continued to make progress on many fronts since the previous update in November 2014. For instance, the Strategic Sourcing initiative has joined forces with a consortium of Boston-area colleges and universities to negotiate a favorable contract with Fisher Scientific, a major supplier of lab consumables and equipment. This could save the university significant dollars. After months of careful planning and design work, the Budget Center and the Change Collaborative for Research Administration have moved into implementation, while IT Integration and Tufts Support Services have rolled out new technologies and services to the Tufts community. The Advancement Effectiveness initiative continues to lay the groundwork for an upcoming major capital campaign.

The intent of this progress report is to update the Tufts community on the status of active TEAM projects. We will continue to provide updates on a quarterly basis to share the latest developments in TEAM planning and implementation.

### TEAM Projects At-A-Glance

Page	Area	Project	Purpose
2	Advancement	<a href="#"><i>Advancement Effectiveness</i></a>	Maximize the time fundraisers spend building relationships with prospective donors to ensure a successful capital campaign.
3	Budgeting	<a href="#"><i>The Budget Center</i></a>	Introduce a consistent, university-wide approach to budgeting that will better inform decision makers in schools and central divisions.
3	Human Resources & Finance	<a href="#"><i>Tufts Support Services (TSS)</i></a>	Offer a simple, efficient way to complete many administrative human resources and finance tasks. Free up HR's time to support employee and organizational development.
4	Information Technology	<a href="#"><i>IT Integration</i></a>	Integrate IT staff and resources, improve service delivery and support, enhance how Tufts faculty, staff and students use IT. Introduce tools to enable online learning.
5	Procurement	<a href="#"><i>Strategic Sourcing</i></a>	Introduce rigorous procurement standards, maximize Tufts' purchasing power and secure the best pricing. Reduce spending while staying responsive to the need for equipment and services.
6	Research Administration	<a href="#"><i>Change Collaborative for Research Administration</i></a>	Provide excellent research support to investigators in attracting external funding and complying with pre- and post-award requirements.

## Next Steps for TEAM

Integration across all the major administrative areas at Tufts will be a major initiative over the next nine months. The TEAM Administrative Process Integration (API) project will streamline business processes, integrate systems and take advantage of technology that have been put in place as part of TEAM. The API project will improve the way administrative transactions are initiated, reviewed, and approved across the university.

Visit the [TEAM website](#) for more details about TEAM's origins and early activities.

## Progress to Date

### **Advancement**

*Challenges: The university will undertake a \$1 billion-plus campaign in the coming years. Fundraisers must maximize the time they spend building relationships with prospective donors rather than tending to administrative tasks.*

The [Advancement Effectiveness](#) project started with a thorough review of fundraiser activity to identify opportunities for reducing time spent on administrative tasks. Moving administrative functions like human resources and technology support to central university offices will allow the division to have access to a greater array of services and provide staff in those areas more opportunities for career growth.

Current Status:

- Expanded use of fundraising performance metrics.
- Rebalanced fundraiser portfolios.
- Maximized focus of frontline staff on fundraising activity.
- Centralized local HR functions.
- Centralized local help desk and desktop support functions.

## **Advancement Effectiveness Timelines**

### Fundraiser Effectiveness



### Streamlined Central Services



## Budgeting

*Challenges: More than 600 people are currently involved in the budget process, which is time-consuming and inefficient. The widespread use of spreadsheets requires multiple transcriptions that result in inaccuracies and promotes a lack of transparency.*

[The Budget Center](#) will be a service organization within the central Finance division, staffed with full-time finance professionals who will work directly with schools and central units. The Budget Center will facilitate a uniform, strategic and transparent budgeting process across Tufts.

### Current Status:

- The Budget Center is scheduled to launch in the summer of 2015.
- The Budget Center will expand the breadth and depth of analysis to assure budgets support Tufts' strategic priorities.
- Recruitment for Budget Center staff began in early March with the posting of four director positions.
- Additional positions will be posted in April/May and training will begin soon after.
- The Budget Center will have a presence on all three campuses.
- Budgeting software, Axiom EPM (enterprise performance management software), has been selected and design and implementation are complete in three areas: operating budget, position budget and forecasting. Work on a grants budgeting module is underway.
- The Budget Center staff will use Axiom to create and monitor budgets across the university. This will standardize budgeting processes, substantially reduce shadow systems, and increase transparency and accuracy in the budgeting process.
- EADs, VPs, department chairs and directors will not need to learn new software to review reports prepared by the Budget Center.

### Budget Center Timeline



## Human Resources and Finance

*Challenges: Duplicative efforts, many of which involved outmoded paper forms, detracted from Tufts' core mission of teaching, research and public service. Tufts' human resources department received almost 4,000 general questions about policies and procedures every month.*

[Tufts Support Services \(TSS\)](#) is a new department that supports an improved model for delivering services to Tufts faculty, staff and student-employees. Tufts has consolidated resources to provide a simple, service-oriented approach to conducting many of the administrative human resources and finance tasks previously carried out by many different groups within the university.

Current Status:

- TSS launched in December 2014.
- As of April 1, 2015, TSS handled almost 11,500 cases. Of this total, 57% came in via email and 27% via phone. The rest came in through US mail, the TSS web portal, walk-ins and fax.
- The cumulative Net Promoter Score (NPS), which measures customer satisfaction, based on survey responses is 60. NPS is based on a scale of 80 basis points, in which a score over 50 is considered good to strong.
- TSS continuously monitors Service Level Agreement (SLA) performance, the time it takes to assign and handle cases. After four months of operation, TSS assigned, handled and closed just under of 90% of Tier 1 and Tier 2 cases within the parameters of the Service Level Agreements.
- Over the past three months, TSS has conducted a series of outreach sessions in schools and divisions on all three campuses and gained valuable feedback.
- TSS continues to gather comments from survey responses and other channels to help guide improvements and adjustments of administrative processes.

### Tufts Support Services Timeline



### Information Technology

*Challenges: Tufts had numerous overlapping information technology (IT) services, provided by multiple organizational units across the university. Today's work and sophisticated technologies demand greater orchestration of IT resources and services.*

#### Supporting Academic, Faculty and Staff Needs

[Tufts Technology Services \(TTS\)](#) is improving processes and introducing technologies that provide faculty, students and staff ubiquitous access, anytime support, responsive service and productive partnerships. Each of the activities below is based on feedback gathered from the Tufts community.

Current Status:

- Providing **access to software tools** to enable faculty, students and staff to work more productively.
- Providing anytime support across all three campuses in targeted areas through the **24x7 Service Desk**. The service will be extended to the School of Dental Medicine, Tisch Library and University Advancement in the coming months with implementation targeted to complete by September 2015.
- Updated the **Student Information System (SIS)** in March 2015 in response to student, faculty and registrar needs for a more intuitive and efficient course search, search results and navigation structure.

- **Expanded classroom support** to include evening hours for AS&E courses. Currently implementing remote monitoring of A/V equipment to enable a more comprehensive, proactive approach to maintenance.
- Launching a **new IT advisory structure** this spring to make recommendations on IT policy and investments as IT services evolve at Tufts. The structure consists of an IT Steering Committee and five subcommittees comprised of faculty, staff and students that will focus on the following areas: Teaching and Learning, Research and Scholarship, Standards and Architecture, Administration, and Information Stewardship. The goal for these committees is to complement the local IT advisory committees within schools and divisions to help make recommendations on policy and investment in IT at Tufts.

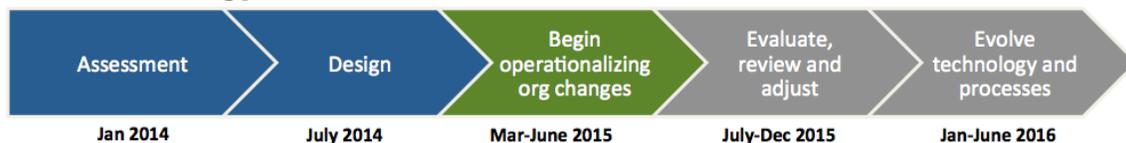
### Organizational Design

TTS has developed an organizational design that better aligns our services with the community’s needs. The organizational design incorporates the foundational work of the **TEAM: IT Integration Working Groups** and will focus on four main areas: Planning and Design, Delivery and Operations, Data Strategy and Management, and Academic Technology.

#### Current Status:

- Operating as “One TTS,” a single, unified IT organization. As of January 1, 2015, IT at Tufts University went from a distributed function across the three campuses to one integrated TTS.
- Announced a new organizational design in March 2015 built around four main design principles (outlined above), which will result over time as TTS operationalizes the changes to structure, processes and technology.
- Enhancing user experience of IT Services through improved coordination and building greater depth of skills in the areas of service planning, design, development and delivery, allowing for effective resourcing at all stages of the IT service lifecycle.
- Creating additional capacity in mission-critical growth areas for educational and online learning technology — classroom and event support, research technology, data management and analytics, and design and architecture — by realigning and rebalancing staff.
- Effectively managed attrition over the past two years, enabling IT Services to:
  - Create new positions to fill critical needs in supporting growth areas.
  - Minimize the number of reductions of filled positions and adverse impact on staff.
- Currently implementing integration plans in three phases, with a majority of the organizational changes expected to occur in phase one by June 30, 2015.

### **Tufts Technology Services Timeline**



## Procurement

*Challenges: The purchasing department needed tools and processes that would enable it to evolve from a transactions-based department to one that could make strategic purchases based on internal and market data analysis.*

[Strategic Sourcing](#) is introducing rigorous procurement standards to maximize Tufts' purchasing power and secure the best possible pricing. By improving purchasing practices, we can spend less money while remaining responsive to equipment and service needs.

Current Status:

- Leveraged the shared purchasing power of a consortium of Boston-area colleges and universities to negotiate a favorable five-year contract with Fisher Scientific. The contract could enable Tufts to save more than \$350,000 on lab consumables and equipment each year.
- Renegotiated Tufts' contract with the university's credit card company to double rebate.
- Implemented a new spend-analytics tool to help identify savings opportunities and develop sourcing strategies.
- Increased productivity and efficiency in building maintenance and cleaning.
- Identified potential for saving 20% in building maintenance, repair and operating costs, such as light bulbs, filters and plumbing supplies.
- Renegotiated campus bookstore contract with Barnes & Noble.

## Strategic Sourcing Timeline



## Research Administration

*Challenges: Regulations that govern research have become increasingly complicated, demanding consistently applied practices, performance-level standards and continued education for research administrators. These demands impose a large administrative burden on research faculty and departments.*

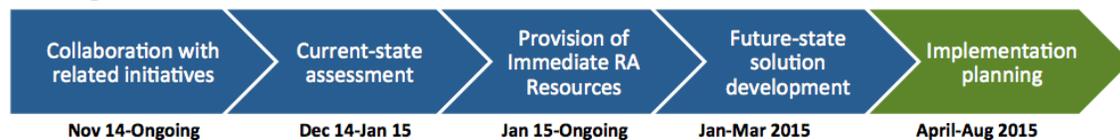
The [Change Collaborative for Research Administration](#) (CC) is working with the Tufts community to develop an improved model for research administration at Tufts. The group has the end goal of providing excellent research support to investigators in attracting external funding and complying with pre- and post-award requirements.

Current Status:

- Brought more than 80 Tufts staff from departments and central administration together for a three-day workshop on pre- and post-award fundamentals by the National Council of University Research Administrators (NCURA) in January 2015.

- Providing additional resources for pre- and post-award support at schools and departments, especially those that have not had adequate support in the past. Hired three Senior Department Research Administrators (DRAs) and continuing to recruit for two positions that remain open.
- Collaborated with the Research Administration System (RAS) project to gather and incorporate community feedback into the RAS design process
- Collaborating with the Uniform Guidance Task Force to vet policies and procedures on Subrecipient Monitoring, Travel, Cost Share, and Institutional Base Policy.
- Collaborating with the Budget Center implementation team to integrate processes and service to help manage the financial side of grant administration.
- Finalizing a strategy for campus-wide Research Administration support that will ensure consistent pre- and post-award service, maximize the probability of funding, and minimize institutional risks.

### **Change Collaborative for Research Administration Timeline**



### About TEAM

TEAM is a university-wide initiative designed to ensure Tufts administration supports the university’s core academic mission to the greatest degree possible. TEAM’s goal is to reduce the collective effort we currently commit to common and sharable administrative work. This is a critical step toward ensuring a sustainable balance between Tufts’ aspirations and its resources.

### TEAM Origins and Opportunities

TEAM grew out of the understanding that in order to remain sustainable and meet the growing demand for financial aid and efficiencies in higher education, Tufts needed to utilize its limited resources more efficiently.

Tufts chose to take a deliberate, thoughtful approach to controlling expenses. Rather than imposing across-the-board cuts, TEAM has identified the ways we can contain costs and minimize red tape. Money saved within schools will remain part of those schools’ budgets to support the kind of innovative projects that exemplify Tufts’ tradition of excellence.

### Contact TEAM

We appreciate the more than 700 people who have already shared insights with the TEAM project and continue to seek your input and advice.

You can email us at [TEAM@tufts.edu](mailto:TEAM@tufts.edu), or share your thoughts anonymously through the online [Community Input](#) form.

We will continue to update you on TEAM progress via *Tufts Announcements* emails and on the TEAM website <http://team.tufts.edu>.