processfix

Autumn newsletter 2018

Welcome

The noughties was a decade of significant cultural change: Facebook, Twitter and Youtube entered our lives, Wikipedia was launched and the hierarchy of information changed forever. These changes and more, have continued into the twenty-tens, which are now approaching their end in a period of great uncertainty. Whatever the twenty-twentys bring, we need to make sure that we are equipped to deal with the inevitable challenges, from the big picture right down to the smallest detail.

In this issue, we hear from Matt Higgins, Deputy Director of Finance at the University of Surrey, as he launches a programme of process review with a particular focus on empowering individuals and driving continuous improvement.

Thank you to the University of Liverpool for their article reflecting on the decision to look in depth at established processes within their finance function, to see how they could do things differently and more effectively.

And in our spotlight this quarter, Sian Minett, Director of Estates Portfolio & Business Services at UCL, outlines their approach to improving the complex and multi-faceted timetabling process to fit with the changing size and needs of their institution.

NEWSFLASH!

London, UK - October 2018
University College London (UCL) halve the turnaround time for postgraduate admissions

University of Surrey launch process improvement programme

Matt Higgins is the Deputy Director of Finance at the University of Surrey. Alongside his work in finance, Matt has been leading a project to identify what a successful programme of review would look like at the University and is now in a position to launch the programme with the backing of the Executive Board.

"In 2017 the new Vice Chancellor launched a strategy which he wants to underpin with a continuous improvement approach to processes. We know that to remain financially sustainable, even if we grow our student income, we will not be able to grow our professional services staff levels to the same extent."

Matt explained that in real terms, the student income stream is going down, with only a £250 increase in fees since the launch of £9,000 fees in 2010/11, whilst staffing costs, along with other day-to-day operational costs, are continually rising. "From the student's perspective, of course, we have to make sure that we provide the best possible frontline teaching and learning experience. Our challenge is how to free up the academic community to do this and to make sure that the back office is running as well as possible. We want to provide our services in the way our students need, but take out the waste that has inevitably built up in our processes over the years."

Matt explained how, having got the initial approval from the Executive Board to explore what a 'good programme' might look like, he contacted another university already on this journey, together with Processfix and an external consultancy. "Following on from those initial conversations, I went back to the Executive Board and gained approval to run some pilot projects. These focused on three different processes that our colleagues had already identified as priorities for improvement. We gave each provider one process (post-graduate research admissions; travel and expenses; and research – legal contracts), observed their different approaches and formed an opinion on what success would look like. We identified the following criteria:

— An individual with the time to dedicate to the programme who will give clear direction and ensure that any activity works across both the academic and professional service communities (as most processes cut across the organisation as a whole)

— Our staff need to learn how to facilitate the programme and individual process reviews for themselves

— Our staff need to understand more about processes and how they are impacted by our sector constraints and opportunities."

Following this period of information gathering, Matt was able to recommend to the Executive Board that Processfix be appointed to empower staff with the ability to facilitate and run workshops themselves. "We want our departments to want to own the programme for themselves. We want to embed continuous improvement in our culture, where we are not having meetings about it; rather are constantly doing it."

"We have incredibly competent people at the University; now is the time to empower them"

"It is all about the people and the culture. We will be moving from an environment where there are a lot of good controls and compliance, to one where we trust each other more. We have incredibly competent people at the University; now is the time to empower them to make decisions and to develop an environment where those people take ownership of a process."

If you're interested in speaking to Matt about any of the above, please contact him via email: matt.higgins@surrey.ac.uk

Fresh thinking at the University of Liverpool

Leading facilitators, Processfix, have started working with the University of Liverpool to deliver a programme of Rapid Improvements Workshops as part of their Finance Functional Review. With over 50 university clients, Processfix has a wealth of experience working across the Higher Education sector, delivering measureable improvements in everything from admissions and recruitment processes, to fees and procurement.

"We aren't just another consultancy who parachutes in and tells you what to do" says Processfix founder, Jules Cross. "That's not how we operate. We believe that the people on the ground who run the processes, know better than anyone what works and what doesn't."

He continues: "As processes evolve over time, they become unnecessarily complex. Using powerful, proven behaviour-changing techniques, we give staff the headspace to focus on what each process is trying to achieve and then re-evaluate the way they do things. That way they can develop new and improved ways of working." Processfix were commissioned to facilitate five workshops at the University, starting with a Champions Workshop in July, which brought together senior leaders from across the institution to take a fresh look at how we deliver our finance processes.

Over the course of the intensive two-day Champions Workshop, the leadership team undertook a 'mock' process review, gaining first-hand experience of what's involved. They then prioritised and scoped the processes to be reviewed through a programme of four Rapid Improvement Workshops. Participants at each Rapid Improvement Workshop were chosen to ensure end-to-end representation and included process owners and administrators, as well as 'internal customers' from across the University.

"this is a chance to look at established processes and ask ourselves how we could do things differently"

This will support the Finance Functional Review deliver tangible improvements during their Planning and Information Phase.

"We do many things as a matter of routine and this is a chance to look at established processes and ask ourselves how we could do things differently and more effectively" says Fiona Astor, Business Improvement Manager in the Strategic Change Team and Project Manager for the Finance Functional Review.

Fiona continues: "The most effective change comes when all stakeholders are involved and engaged. These workshops will help establish networks and relationships between staff that will be hugely beneficial for the Finance Functional Review going forwards, breaking down barriers between different areas of the institution. More importantly, staff will come up with the solution that works best for the University and also for them individually." Jules adds: "The workshops are designed to empower

"The most effective change comes when all stakeholders are involved and engaged"

staff to take control, to listen to each other's ideas and then agree and make the change as a team. This shared input and ownership is vital, as it gives you the momentum to make the necessary changes after the workshops are over. I think staff will be surprised at what they can do when they work together and come up with a fresh way of doing things. It can be quite a liberating experience."

If you'd like to find out more about the University of Liverpool's Finance Functional Review, please email: ffr@liverpool.ac.uk

In the spotlight: Sian Minett, Director of Estates Portfolio & Business Services, University College London (UCL)

UCL

Sian draws on a significant amount of relevant experience to lead the timetabling process at UCL. She worked as a departmental administrator, timetabler and faculty manager before joining UCL, where she worked at faculty level before moving to Estates in 2011. Her role has now expanded to include both timetabling and bookings, alongside her wider portfolio. She recently brought Processfix in to facilitate a workshop on the administrative processes associated with timetabling at UCL.

What is the background to timetabling at UCL?

Timetabling at UCL has historically sat within Estates rather than within Student Registry Services and it is, as for so many institutions, a considerable challenge. At UCL, it had reached the point where a few years ago the Provost set up a task group to address critical issues such as late rooming and overcrowding. At that time, it was felt that it was about the amount of teaching space available, but when I started to get under the skin of the people, processes and systems, it became clear that it was a much wider issue. Timing of module registration and the extent of module choices are just a few of the factors impacting timetabling, as is the fact that the overall process is devolved to departmental level, with up to 100 departments and at least one timetabler working on each.

What was the driver for the Processfix workshop?

Last year I participated in a Processfix workshop on the planning and budgeting process and thought that it would be of value for timetabling, particularly as a key output of each workshop is an action plan. We decided to look at the end-to-end timetabling process from the administrative perspective. With over 40,000 students, 9,000 staff, 7,000 modules and up to 600 teaching spaces (some centrally managed, some departmentally managed), we had to accept that there would be other factors that also needed to change and we could not address everything in one go.

But, if the workshop at least got people together to start looking at how to fix the problem connectively, then that would be worth doing. To make the most of the opportunity we identified people from departments where there had been particularly challenging timetabling issues; also some very experienced timetablers who we felt would bring challenge to the group and we looked to have representation from the four schools that we have

"for an institution of our current size, we need to change and evolve."

across the University. It will take time to see the impact of all the changes we agreed in terms of the process, but the feedback at the end of the workshop was overwhelmingly positive.

What key factors will make the timetabling process 'fit for purpose' at UCL?

At UCL, we are currently undergoing a major transformation programme of professional services and timetabling is aligned with this. Within that transformation, the key things that I believe will significantly impact our success are:

— Reducing the number of people involved in the process. We have multiple departments, multiple timetablers and there is discussion around moving to faculty timetabling as well.

— Clarity of, and adherence to, clear roles and responsibilities for everyone involved in the process, ranging from the individual lecturer through to a Dean and from central timetablers to departmental/ faculty timetablers.

— Clear programme diets and early module registration. All rooming and timetabling is currently based on estimates, as apart from the compulsory modules, students don't have to register until two weeks after the start of term.

— A more scheduled approach. We need to define a set of essential requirements from a staff/student perspective and then provide optimised schedules, instead of trying to find rooms for an infinite number of departmental timetables.

When we were a much smaller institution, we managed. But for an institution of our current size, we need to change and evolve. But because timetabling is so complicated and multi-faceted, whilst we need to know where we are heading and how to get there, we also need to be realistic about what can be achieved, as it will take a long time!

If you're interested in speaking to Sian about any of the above, please contact her via email: s.minett@ucl.ac.uk

About us

Organisations rely on processes to get things done. Often these simply evolve over time and become inefficient ways of working. Processfix bring powerful, proven and behaviour–changing techniques to bear in a professionally facilitated environment.
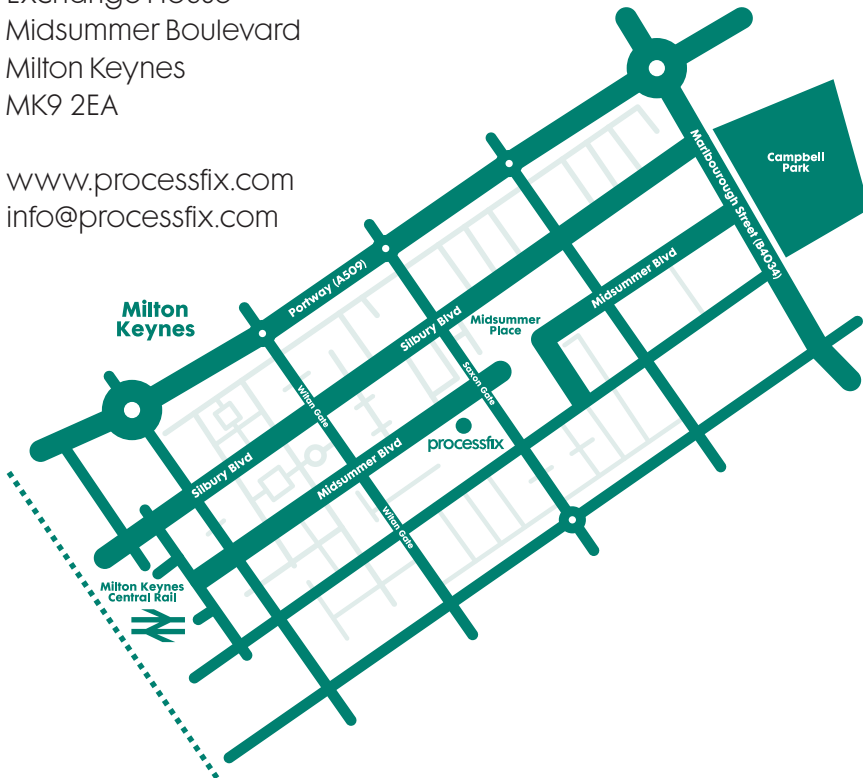
We focus on engaging your teams in their own improvement, empowering them to re–evaluate the way they do things and to develop new and improved ways of working that transform performance and deliver immediate results.

Whether you require Rapid Improvement Workshop facilitation, training, project leadership or an organisational wide process improvement programme. Processfix specialise in facilitating your team, delivering immediate benefits and instilling continuous improvement across your organisation.

And Finally...

The world famous Bodleian libraries commission first Processfix workshop to review the staff recruitment process

If you would like to find out how Processfix can benefit your organisation, please contact us at:

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