

2016

# A REPORT TO THE LEGISLATURE

## Operational Efficiency & Effectiveness in Washington Public Four-Year Higher Education

CENTRAL WASHINGTON  
UNIVERSITY



EASTERN WASHINGTON  
UNIVERSITY



THE EVERGREEN STATE  
COLLEGE



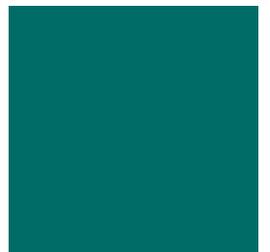
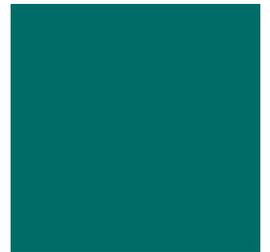
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January 2016

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The Council of Presidents (COP) is an association of Washington’s six public baccalaureate degree granting college and universities. Located in Olympia, Washington, COP strives to be a common voice for the public baccalaureate sector and the most respected and trusted resource for decision makers on issues affecting public higher education. COP serves a coordinating role for a number of initiatives and activities common to the public baccalaureate institutions, fostering coordination and collaboration among the public baccalaureates as well as with other educational partners, both in Washington and nationally.

This report is also available online at <http://www.councilofpresidents.org>

## Introduction

Nearly five years after enactment of HB 1795, Washington's public baccalaureate institutions have experienced numerous successes in partnership with policymakers and state agencies. As a result, hundreds of ideas have been proposed and implemented to make the operations of public colleges and universities more efficient. These efforts only reinforce Washington's reputation of being one of the most efficient public baccalaureate systems in the nation. Four pieces of cost savings legislation have been passed since 2012 with strong bi-partisan support. These changes to state statute build upon and enhance changes made at the institutional level. Through these efforts the public baccalaureate institutions have shown their commitment to continuous process improvement, more efficient business practices and increased transparency and accountability to taxpayers, state leaders, and students. As the state begins to reinvest in the education of Washingtonians, public colleges and universities are provided a unique opportunity to make a difference in the lives of our students. In challenging economic times, higher education efficiencies allowed us to protect core academic functions and continue to deliver a high quality education to our students. We are now serving more students and producing more degrees. We now have the ability to turn the corner and focus on enhancing higher education opportunities for Washingtonians. As we reinvest in higher education, our work on legislative efficiencies ensures that new appropriations in our colleges and universities have a maximum impact on our students' ability to have a rich experience, earn a degree, and make meaningful contributions to the state and regional economy. Our continued partnership with policy makers and stakeholders will help open doors to high-quality postsecondary education for more Washingtonians.

## Legislative History

During the 2011 legislative session, the Legislature passed Engrossed Second Substitute House Bill (HB) 1795 (2011) – also known as “The Higher Education Opportunity Act.” Among its many provisions, Section 27 of HB 1795 required the Office of Financial Management (OFM) to work with the Council of Presidents (COP) to convene an interagency work group to develop and implement improved administrative and management practices that enhance the efficiency and effectiveness of operations throughout higher education campuses. A work group comprised of representatives from COP, the State Board for Community and Technical Colleges (SBCTC), and OFM was established to oversee this work. Since its inception, the group has been instrumental in identifying areas where efficiencies could be gained in administrative and operational functions. After the 2013 statutory expiration of the work group, COP continued to work collaboratively with the public baccalaureate institutions and the SBCTC to find efficiencies to present to policymakers. Both sectors are equally committed to continuing the work on a long-term basis.

## Past Efficiency Legislation

The higher education efficiency work group's effort led to the development of a package of “regulatory relief” bills in the 2012, 2013, and 2014 legislative sessions. In the 2015 legislative session, we continued to work on capital budget issues, which included legislation and work with OFM. With strong support from colleagues at the public community and technical colleges and other higher education partners, the workgroup advanced the following bills:

### 2012

- ◆ HB 2259 (Chapter 227, 2012 Laws)– Repeals the requirements in state law for institutions of higher education related to crime statistics reporting and campus safety plan development.
- ◆ HB 2585 (Chapter 230, 2012 Laws PV)
  - Exempts institutions of higher education from certain competitive contracting requirements for goods and services purchases and personal service contracts of less than \$100,000 and also for travel arrangements.

- Authorizes institutions of higher education to make advance payments for certain equipment maintenance services.
- Implement compensation changes for certain health care classifications (vetoed).
- Requires that salaries and wages be paid using direct deposit or alternate methods.
- Makes local operating fee accounts subject to allotment procedures, and makes permanent the requirement that institutions of higher education charge certain expenditures in ratios that conserve appropriated funds.
- ◆ HB 2735 (Failed to Pass) – Increased minor works and pre-design project thresholds.
  - Raised the minor works project threshold for higher education institutions from \$2 million to \$5 million.
  - Raised the predesign threshold for higher education institutions from \$5 million to \$10 million.

## **2013**

- ◆ HB 1736 (Chapter 218, 2013 Laws) – Created a work group led by OFM to reduce reporting requirements related to building and environmental standards and transportation services, authorized the use of electronic signatures, authorized interstate reciprocity agreements for consumer protection for distance learning standards, and authorized student advisory groups on higher education governance.
- ◆ HB 1769 (Failed to Pass)
  - Increased the threshold for minor works projects from \$2 million to \$5 million for higher education institutions.
  - Increased the threshold for predesign requirements for major construction works from \$5 million to \$10 million for higher education institutions.
  - Permitted the regional universities, The Evergreen State College and the community and technical colleges to enter into financing contracts for real property, that are not subject to allotment or appropriation by the Legislature and are payable only from local fees and revenues.

## **2014**

- ◆ SHB 2613 (Chapter 162, 2014 Laws)
  - Specified that only the public baccalaureate institutions that raise tuition above the assumed levels in the Omnibus Appropriations Act must provide financial aid mitigation information and modifies the due date for mitigation reporting.
  - Adjusted certain reporting requirements for financial aid mitigation.
  - Required that the Joint Legislative Audit Review Committee's audit of the impact of tuition-setting authority consider student completion rather than institutional quality.
  - Permitted institutions of higher education to change payroll frequency from semimonthly to biweekly and prorate paychecks for faculty on nine-month appointments.
  - Increased the predesign project limit for capital projects from \$5 million to \$10 million. (Not implemented by OFM).

## **2015**

- ◆ SB 5562/HB 1532 (Failed to Pass) – Provided a technical fix to allow the full implementation of pre-design requirement threshold by increasing the limit for cost estimates for major capital projects for higher education institutions from \$5 million to \$10 million.

## Internal Higher Education Efficiency Efforts

Complementing statutory changes advanced by policymakers are hundreds of improvements to business practices made by the public baccalaureates on their individual campuses. Included in this report is a summary of each institution's efforts over the past year. Each has developed a robust system to identify areas of need and continuous improvement in a variety of functional areas.

Past institutional initiatives are summarized in COP's 2012 and 2013 operational efficiency reports available at:

- ◆ Operational Efficiency and Effectiveness in Public Four-Year Higher Education in Washington (November 2012) [http://www.councilofpresidents.org/docs/r\\_d\\_docs/COP\\_EFF\\_REPORT\\_11\\_12.pdf](http://www.councilofpresidents.org/docs/r_d_docs/COP_EFF_REPORT_11_12.pdf)
- ◆ Operational Efficiency and Effectiveness in Public Four-Year Higher Education in Washington (November 2013) [http://www.councilofpresidents.org/docs/reports/COP\\_EFF\\_REPORT\\_13.pdf](http://www.councilofpresidents.org/docs/reports/COP_EFF_REPORT_13.pdf)

## OFM Work Group on Agency Reporting

In addition, COP worked closely with OFM on developing recommendations for coordinating and streamlining higher education reporting in accordance with HB 1736 (Chapter 218, 2013 Laws), efficiency legislation from the 2013 legislative session. The public baccalaureate sector and the SBCTC reviewed dozens of reporting requirements related to the Department of Enterprise Services, the Department of Ecology, and the Department of Transportation to identify duplicative or inefficient reporting.

- ◆ Specified Reporting Requirements for Higher Education Institutions (August 2014) <http://ofm.wa.gov/reports/ReportingReqsHEInstitutions2014.pdf>

## Capital Scoring Reform

COP is engaged in conversations with OFM about improvements to the process of developing the state's capital budget. The capital budget directors at each four-year school identified five efficiency items to begin discussions with OFM. They include allowing access to Building for the Arts funds during the design stage of capital projects, identifying funding sources for technology with lifecycles less than seven years, fixing the capital cost estimate to align with the pre-design threshold of \$10 million, reforming the capital project scoring and ranking system, and the creation of a capital construction cost savings pool. A 2015 capital budget proviso in HB 1517 (2015), Section 7040, resulted in a vigorous conversation and report on how to improve the project capital scoring and ranking process, including improving the submittal process, the capital scoring process, and increasing utility to policymakers. The end result was a report, Washington State Report of the Four-Year Prioritized Capital Project List Technical Work Group (January 2016), [http://www.ofm.wa.gov/budget/capital/4year\\_prioritized\\_capital\\_project\\_work\\_group\\_report.pdf](http://www.ofm.wa.gov/budget/capital/4year_prioritized_capital_project_work_group_report.pdf), with concrete recommendations on process improvement and recommendations for legislative change.

## Next Steps

The Council of Presidents will be submitting legislation for the 2016 session that will include a wide variety of administrative efficiency and regulatory relief initiatives. Staff have spent the summer vetting ideas from the six public baccalaureate institutions as well as the community and technical colleges. In addition, a number of administrative efficiencies have been identified that will be pursued during the 2016 interim period.

## Conclusion

Continually assessing and reviewing operations helps ensure that that Washington's four-year institutions, as public entities, remain good stewards of taxpayer dollars in nearly every functional area, including information technology, curriculum management, student services, finance, human resources, facility maintenance, utilities, and many others. We are immensely grateful to policymakers for their commitment to the success of these efforts, as well as to our partner agencies and organizations for their time and effort.



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## Responsibility-Center Management (RCM)

Over the past 18 months CWU has implemented a new, more transparent and decentralized management system. Responsibility-Center Management is, in many ways, a private sector business model. All revenue is assigned to the key “business units”---academic programs-- according to student credit hours, majors, pre-majors, and graduation rates. Overhead comes directly out of the gross revenue. The remainder is available for business functions. The academic sector can reduce costs or increase revenue to meet budget needs. RCM illuminates the “profit” and “loss” for each program, informing the management decisions of academic leaders. The system allows individual colleges and departments the ability to plan for their own needs and be rewarded for their own success.

### 1. Intelligent Academic Advising

Central Washington University is utilizing student retention data to better identify, interact, and provide advising for students struggling with their academics. This eight-year research project determined the characteristics of students most at risk and established 32 different groups that track risk from the first quarter to graduation, for both first year and transfer undergraduates. The research has equipped advisors with the data they need to identify students most at risk of dropping out, in order to intervene before that happens. The evidence of this collaboration and CWU’s commitment to student achievement has resulted in a 4% increase in retention rates over the past two years

### 2. Efficiency Benchmarking

CWU engaged McGladrey, a national CPA firm, to perform risk assessment, benchmarking, and audit tasks over a multi-year engagement. McGladrey’s review determined that CWU is progressing in strategic maturity in key foundational pieces such as business planning, responsibility-centered management, budgeting, and Performance Management. Furthermore, McGladrey determined that CWU is below peer group average staffing in several departments such as Financial Services and Human Resources, and below peer group costs in several important cost measures, such as athletics, energy costs, payroll costs, library collection costs, and instruction expense.

### 3. Time and Attendance Automation

As a result of implementing PeopleSoft Time and Attendance modules CWU has significantly reduced paper in the time and leave processes. Forms that once required seven signatures now are processed with a few mouse clicks. Electronic forms and authorizations have replaced paper forms and manual routing for approval. Distributing the time keeping function electronically to the individuals doing the work has reduced the burden on the many departmental timekeepers by an estimated 1,000 hours per pay-cycle.

### 4. Online Travel Automation

The newly implemented online travel system allows travel authorizations, advances, and expense reports to be processed and approved almost instantaneously and reimbursements made electronically to employees. Automatic calculation of per diems for meals and lodging have simplified the automated processes and reduced the amount of corrections, while increasing the turnaround time from expense report to receipt of reimbursement. The implementation of online Travel Authorization has resulted in reduced cycle times by more than 90%.

## 5. Chart of Accounts Redesign

CWU recently adopted the budget software Hyperion, replacing thousands of “project identification” (PID) numbers with accounts that reflect key business functions. Previously PIDs were assigned to people rather than to functions, with some departments logging as many as a thousand small PIDs. By combining several small budget puzzle pieces, the new system creates a coherent picture of administrative or academic functions and enables the university to better understand the work of the enterprise. Hyperion enhances coordinated budgeting because it provides dynamic, real-time budgeting. The supercharged spread sheet lives in the cloud, allowing multiple users to access it. Hyperion also enhances the ability of business units to forecast budgets, rather than waiting to the end of a budget period to see how much is left.

## 6. Improving Central’s Applications and Technology (iCAT)

CWU undertook a multi-year, university wide project to transform all of its antiquated paper based systems to modern, more efficient, electronic systems. Beginning in 2012, these projects have fundamentally changed not just the university’s hardware and software infrastructure, but the efficiency and accessibility of information for every university employee and customer. Here are some examples of iCAT projects and the efficiencies that were achieved:

- ◆ Faculty 180 - All promotion and tenure files moved to an online environment, saving thousands of pieces of paper, hundreds of 3-ring binders, and making updates easy
- ◆ Purchase acquisitions – reduced cycle times by 80 percent and eliminated more than 23,000 signatures
- ◆ Travel authorizations – significant reduction in cycle times; eliminated more than 41,000 signatures
- ◆ Electronic Personnel Action Forms – eliminated more than 20,000 signatures; saved over 3500 hours of staff time
- ◆ Time and Attendance – estimated savings of more than 22,000 hours to be used for higher value work (134 time keepers x 7 hours per pay cycle)
- ◆ Eliminated more than 90 servers, reducing repair and maintenance costs significantly
- ◆ Consolidated software licenses, eliminating redundancies, negotiating multi-year contracts, and achieving significant savings.



### **1. TEMS – Travel Management system to streamline that Travel Authorization process**

The Travel & Expense Management System (TEMS) is an integrated module within our finance system that automates and streamlines the travel authorization, advance request, and expense reimbursement processes. Travel requests and approvals are routed electronically using Workflow, an application that generates email notifications prompting users for actions. In this paper-free environment the status of each travel document is tracked throughout the process. Transactions (encumbrances, cash advances and expenses) automatically post in our finance system after review and approval by the EWU Travel Accounting Office.

### **2. Procurement and Contracts training as developed by Department of Enterprise Services – RCW 39.26.110) is delivered via CANVAS as opposed to going through the state Learning Management System**

In coordination with the Washington State Department of Enterprise Services, state agencies and institutions of higher education will require employees responsible for developing, executing, or managing procurement or contracts to complete assigned training.

To comply with RCW 39.26.110, EWU is required to provide Procurement and Contracts training for our employees. The training developed by Washington State Department of Enterprise Services focuses on best practices related to procurement and contracts.

EWU is providing this procurement and contracts training through Canvas, EWU's Learning Management System to utilize. The training can be accessed anytime using their EWU specific credentials. Identified participants do not need to go through the WA State LMS system. EWU participants do not need to register with the WA state LMS and obtain a separate logon. In utilizing Canvas, EWU has the ability to interact with faculty and staff and assist them with the course material. We also have the flexibility on how to deliver the course to our campus depending on the needs of the learner and department.

### **3. TAPINGO – Mobil food ordering APP allowing individuals (students) to order their meal via the app and picking up the meal at a later rather than waiting in line**

EWU launched this app (Tapingo) and has been well received by various campus stakeholders. Members of the campus community can simply download the Tapingo App on their iOS enabled or Android enabled device. Users can connect their campus card and/or credit card, and order away! They can also order via your web browser by visiting Eastern Washington University on Tapingo. Users can now have their favorite food items at their favorite campus restaurant ready to pick up.

### **4. Sustainability – Hiring of a Sustainability Coordinator to maintain the focus on suitability efforts on campus**

This position is responsible for developing and coordinating sustainability standards and guidelines for Eastern Washington University, collaborating with individual departments; fostering a university-wide culture of environmental mindfulness allowing the integration of sustainability values and practices into the university long term planning and processes. The Sustainability Coordinator will assist in the development of university wide sustainability goals and objectives.



the evergreen  
state college

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## **1. Enrollment -- Constituent Relationship Management Software**

Evergreen staff have been keenly interested in and following the latest trends in “constituent relationship management” or CRM software for years. Six months ago, we contracted with Hobsons, a well-established, higher education focused vendor to provide us with their CRM, Radius. The product is hosted by Hobsons “in the cloud” and interfaced with Evergreen’s student information system, Banner. This new product is allowing us to review and streamline all of the admissions processes, transforming many of them into simpler tasks accomplished with one system as opposed to many. Communications templates for emails make mass communication simpler and easily modifiable. Recruitment campaigns will be created in Radius by loading data into the system. This will replace manual manipulation of massive excel spreadsheets, correlated with several other sources and mail merged into documents for creating mass emails. While our admissions applications were already in digital forms available on a website, the data entered will now automatically reside in Radius for follow up, tracking and immediate action. Our previous applications had to be downloaded from a third party vendor and manually loaded into the student information system before the data could be used. As with most technology endeavors, the efficiencies gained are not always readily tangible or easily correlated to reduced costs. This project is not different. We have had a significant initial investment, but over time, as the system becomes better understood and utilized, we should realize notable cost savings via reduced staff effort, back-end system maintenance and perhaps travel costs due to better targeted recruitments. Better recruitment cycles should also result, as counselors have access to a wealth of information that improves their outreach efforts. Enrollment services should also gain deeper, more meaningful information as counselors populate the system while on the road. This should lead to better analysis and understanding of the students that we’re targeting thereby informing our future efforts. Of course, this will all hopefully lead to more Washington students gaining access to a quality liberal arts education for many years to come.

## **2. Electronic/Web based New Employee On-Boarding Process**

Development and implementation of a web based Onboarding Guide for New Employees – to be more efficient and reducing costs, replacing New Employee Packets (hard copies) and providing the same information to new employees and supervisors via web site - On-Boarding Guide for New Employees -. \*\*Currently a hidden link, but will be part of the HRS website when the enhanced version will be launched. New Employees will receive a Welcome email to their personal email address prior to their start date, including the New Hire Letter and an invitation to begin the onboarding process (Supervisor will be copied on this email). They are provided with the link to the Employee onboarding website. The website includes information materials that were previously part of the New Employee paper packets and information regarding Employment verification I-9 form and instructions, policies/procedures, information about my.evergreen.edu, and other topics related to employment. The site also allows the employee to print out checklists that will help them complete relevant steps for the first weeks of employment.

## **3. New Employee Orientation (NEO)**

The New Employee Orientation was restructured with respect of giving the New Employees/Attendees a hands-on/computer based experience on how to use the HRS resources available on the website and also to provide training on the my.evergreen.edu account features.

To measure the results of the new employee onboarding processes – we seek feedback from new employee's via survey to continue making improvements better assists new employee.

#### **4. Off-boarding Process**

Development and implementation of a more streamlined off-boarding process providing employees and supervisors with essential information regarding separation/transfer/retirement. Seeking feedback via in person or web based (Survey Monkey) "Exit Interview Questionnaires" to collect data in respect to employee retention.

#### **5. Time and Leave System**

Upgrade of Time and Leave system to improve process of time and leave, including administrative reporting structure, elimination of system weaknesses to allow a more user-friendly process of certifications and leave submission.



## UNIVERSITY *of* WASHINGTON

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### 2015

#### 1. Office of Planning & Management

UW Profiles – a set of dynamic, web-based data dashboards launched by UW Institutional Analysis and Enterprise Data & Analytics in fall 2013 – recently received The Data Warehousing Institute (TDWI) Best Practices Award. The award is widely considered to be the business intelligence industry’s most prestigious honor. In addition, Campus Technology Innovators recently honored UW Profiles, calling it “an intuitive, user-friendly portal that provides a single point of access to data and visualizations for faculty and staff.” UW Profiles allows users to explore core UW data through 21 visual dashboards that display summary, comparison and trend data at the university, campus, school/college and department levels. Providing UW community members with an intuitive, self-service data portal has reduced the burden on institutional data specialists, eliminated the wait time for answers to common academic data questions, and has encouraged informed decision-making. In fall 2014, a public-facing version of UW Profiles, called Public Profiles, became available. The UW plans to continue to expand UW Profiles and Public Profiles in the future.

#### 2. Facilities Services

Energy use on campus has continued on a downward trend, despite more people coming to campus, more buildings on campus, more equipment in existing buildings, and hotter summer temperatures. This includes operations at the campus Power Plant as well as water usage. UW’s Power Plant produces steam at a lower cost per 1,000 lbs. than the national average by creating efficiencies in the production process.

#### 3. Facilities Services

From December 2014 to June 2015, UW Recycling’s average diversion rate increased 2.9%, from 61.5% to 64.4%, and diversion rates are on-target to reach 70% by 2020.

#### 4. UW Organizational Excellence (OE) | Showcase

In March 2015, OE invited units throughout the University to share their experience and success with improvements of all kinds, in a two hour “showcase” of poster presentations. Over 60 units shared a wide range of improvement success stories with several hundred attendees.

#### 5. UW Environmental Stewardship and Sustainability | Green Labs

A “Green Lab Certification Program” grew out of work by staff and students in the UW Environmental Stewardship and Sustainability office. They partnered with a class in the College of the Environment, where student projects focused on green laboratories, identifying environmentally friendly lab products and practices, and starting a newsletter. Students’ ideas were incorporated into the certification program, launched in spring 2013. Certification levels are based on several attributes, assessing opportunities for feasible actions that a lab can achieve. As of June 2015, 68 labs have been certified, and 1,243 people work in those labs. These 68 labs are a good start towards expanding the Green Labs certification to hundreds of other laboratories, with a potential for saving an additional \$8 million by instituting sustainable lab practices.

## 2014

### 6. UW-IT

- ◆ MyPlan, UW's web-based academic planning tool, added new features that address high priority needs identified by students to help them effectively plan their academic careers. Students can build and save schedules, find classes that meet specific day and time criteria, and electronically submit schedules to the UW's registration system. MyPlan was one of 11 winners selected from 215 entries to receive a 2014 Campus Technology Innovator award.
- ◆ The UW Tower Data Center received a 2013 EPA ENERGY STAR certification for superior energy efficiency, lowered carbon footprint and slowing the growth of future power needs, one of only two universities in the country to ever earn it. Power savings for the 4545 building data center was 5% in this six-month period, for a total power reduction of 28% since October 2012.

A new Enterprise Document and Process Management initiative is being piloted in 2014 and early 2015 to digitize, store and manage electronic business documents and automate paper-based business processes across the University. This initiative will increase efficiencies, reduce paper consumption and support records retention and collaboration.

### 7. Hall Health Center

A new mental health screening process decreased wait times and reduced need for a therapist to triage patients. Therapists now focus on clinical services.

### 8. Housing & Food Services

A new and secure online invoicing portal provides student billing information to parents. Expected metrics include 75% reduction of staff time spent processing alternate e-statements and 50% reduction in calls from parents/guardians inquiring about student balances.

### 9. Finance & Facilities

Transportation Services launched the Commute Concierge program to help students, staff and faculty navigate complex commuting choices from light rail, streetcars, ferries to save time and reduce aggravation. Since August 2014, more than 675 customers found new ways to commute to campus.

### 10. Office of University Architect (OUA) | Space Planning

A 2014 Learning Spaces Assessment by UW OUA reviewed Seattle campus general assignment classrooms to evaluate scheduling practices, effective room use, technology, physical condition, and faculty and student concerns. The assessment made recommendations to improve classroom scheduling practices, multimedia equipment, and physical condition. It stimulated creation of a space governance committee for oversight, a long term plan for classroom improvement, and changes to scheduling practice that will make better use of available classrooms, all while engaging multiple units across the campus in working together to improve classroom use and design.

### 11. Financial Management | LEAN Continuous Improvement

- ◆ Central online system built for UW field advance requests/submissions. Eliminated duplicate keying of information, saving approximately 40,000 pieces of paper annually.
- ◆ Introduced new payment technology to pay research subjects: One-time, anonymous VISA prepaid cards to pay research subjects; and Gift cards, plastic and online, to pay research subjects .
  - Online gift cards are used for survey's so campus only pays those who respond versus mass mailing with payment incentive automatically included

- Cards used for payment to replace check writing saved just over 100 hours of work annually in stale dating checks that were not deposited by research subjects
- ◆ Provided employees an option to print their Form W2 through their Employee Self Service account. Reduced the number of printed forms through the Payroll Office by 20%. Directed time sorting, printing and distributing the form to other yearend requirements.
- ◆ Paper checks have decreased by 66% over the past three years, through direct deposits campaigns.
- ◆ Through electronic files from the bank, the Payroll Office was able to streamline the bank reconciliation process by reducing the time by 90%.
- ◆ Records Management: Over the past three years, the University of Washington was able to reduce the record series tracked from 3,084 to 959 by combining unique record types. Reducing record types simplifies the tracking and managing of high volumes of official records for both campus units that originate the records and for institutional records retention offices. In addition to this reduction in record types, which applies to both paper and electronic records, there is a decline in paper records, from a high of 5000 boxes per year to currently 3000-4000.
- ◆ Expanding use of existing e-commerce systems, Procurement has moved over 90% of purchase orders for goods and services out of the legacy system in the past four years, with a goal to have no legacy system orders as of December 31st. Electronic invoicing and reimbursement has reduced manual/paper invoices by 50% in the past year and manual reimbursements to employees by 90% over the past three years, replacing with direct deposits. All of this combined has reduced paper payment checks by a third in the last year, with a cumulative reduction in paper checks of more than 80% in the past six years.
- ◆ Managed Print Services program installed 160 new multifunctional devices in the past year (500 devices overall in the past 2.5 years). As a result of consolidation of devices and newer more efficient technology, generated energy savings of 60%, and significantly less paper used due to duplexing.

## **12. UW Bothell: Using Partnerships and Technology to Support Student Success**

UW Bothell wanted to improve its support for students before they are on academic or conduct warning or probation status, through faculty submission of early alerts. Academic early alert provides an opportunity to work proactively as a team among several student offices including academic advising, student conduct, and residential life. It builds on prior work to better support and work with students who are in warning or probation status, replacing spreadsheets with existing software to improve data analysis and monitoring of student progress. That system now makes submission of alerts easier for faculty, and creates an opportunity to develop student success plans across departments. UW Bothell's goals are to reduce the percent of warning and probation students by working with them proactively during classes instead of at the end of quarter, and to improve overall student retention and success.

## **13. UW Tacoma: Collaborating for a Student/Community Center**

UW Tacoma's new student center went from concept to grand opening in just two years, through an ambitious design-build construction project. Even more impressive is the partnership with YMCA of Pierce and Kitsap Counties, which brought a unique solution to meeting student needs for a campus center. UW Tacoma constructed and owns the facility, with a substantial portion of the funding from fees which UWT students voted to pay. The YMCA will operate and maintain it as part of a tenant lease agreement that will undergo student approval every seven years. Students benefit from the Y's expertise in offering health and wellness programs, and will have access to all nine YMCA locations in Pierce and Kitsap counties. It characterizes UW Tacoma, a forward-thinking and resourceful institution, developing innovative solutions to meet student needs.



*World Class. Face to Face.*

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### **1. Education Advisory Board (EAB) Innovation Challenge.**

In 2014 WSU won the Education Advisory Board (EAB) Innovation Challenge by leveraging Spend Compass to gain visibility on opportunities for university-wide contracts, identifying key stakeholders for each contract opportunity, and identifying overpayments on existing contracts. By shifting to a university-wide agreement rather than individual department agreements, WSU achieved a 50% price reduction for secure shredding. In 2015, WSU was runner up in the EAB Strategic Innovation Challenge for utilizing data-minded negotiation to achieve savings. WSU used Spend Compass's Cohort Price Pulse and purchase history with vendors to shift from costly "in the moment" purchasing to more effective, strategic, and data driven price negotiation.

### **2. Online job board platform.**

Washington State University recently began utilizing JobTarget, an online job board platform, to distribute our position announcements to different online sources. Prior to subscribing to JobTarget, WSU departments would have to post their position to each site individually, including the state WorkSource website. JobTarget increases our efficiency by offering many online job boards in one location, making it very easy to distribute job posting advertisements to multiple online sources. In addition to well-known job boards, there is a wide assortment of specialty job boards to help broaden the diversity of the applicant pool or target a niche field. We recently had recruitment for a Microbiologist position in the College of Veterinary Medicine. Previously this had been a difficult position to fill, and the department struggled to build an applicant pool. After utilizing the resources within JobTarget to find additional niche advertising locations, the pool grew to 34 applicants, the largest the department has ever had for this type of position.

### **3. Electronic travel reimbursement, sponsored project, and shipping requests.**

In the 2013 report, WSU discussed our launch of the electronic travel expense voucher (eTEV). By the fall of 2014, WSU's use of the eTEV reached over 80% of the processed reimbursement requests, at which time we made the decision to mandate use of the electronic form for all employee travel reimbursement requests. During FY 2015, the number of processed reimbursement requests reached over 18,000.

Further efficiencies were gained in January 2015 when we began the data interface and upload process of eTEV information. Though the form itself is electronic, integrating the actual payment information to the legacy payment system was a manual process.

In the first 9 months of using the new interface, we have uploaded 13,000 eTEVs, eliminating the manual entry process (estimated at 30 seconds to a minute per entry). Payment errors due to incorrect data entry have been eliminated, thus saving time in researching and correcting errors. In addition to the staff time saved through this interface process (estimated at 20-24 hours per month), we are able to reimburse our travelers tremendously quick. Our average time to process the payment is just 3 business days, and nearly 100% are processed within our benchmark of 7 days.

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WSU added electronic form versions of the sponsored project activity request (SPAR) and the WSU Pullman request for shipment of merchandise (RSM) in late 2014. WSU's use of the sponsored project activity request reached 54% of the processed sponsored project requests by the end of FY 2015. WSU Pullman's use of the electronic request for shipment of merchandise reached over 80% of the processed shipping requests by the end of FY 2015.

Following the success of the electronic travel reimbursement, sponsored project, and shipping requests, we are currently developing other electronic forms for deployment this year, and hope to be able to report back on efficiencies gained in processing expenditures next year.

*\*Success stories of efficiency efforts occurred over the last two years*



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## **1. Banner Fixed Assets Module**

Implemented Banner Fixed Assets Module, automating depreciation calculation and simplifying the reconciliation of fixed assets to the general ledger. This new process eliminates a separate database and provides improved internal controls.

## **2. Facilities Information Management System**

Completed RFP process for a new facilities information management system, which will provide administrative relief for the Facilities department, improved cost management information for campus departments and create efficiencies by reducing administrative efforts across at all levels of staffing.

## **3. Spend management tool**

Implemented a cloud-based spend management tool that brings together accounts payable, P-Card, and purchase order data. Consolidation of this data totaling over \$73 million allows Western to identify cost saving opportunities. It also allows Western to have access to other universities' spend information that reside on the same analytic system, taking collaborative efforts in procurement to an advanced strategic level.

## **4. E-procurement**

Implemented an e-procurement sourcing tool which provides campus buyers a single platform to manage suppliers, quotes responses, and awards all in one place. The system automates the current paper quote process, allowing vendors and internal quote requestors to track responses and requests electronically. We are also in the final stages of implementing an e-procurement purchasing platform that is projected to save the University in excess of \$250,000 annually through efficient purchasing methods and enhanced electronic processes.

## **5. Parking online payment and permit application system**

Implemented an online payment and permit application system. The application allows students, faculty and staff to pay citations and apply for daily/annual parking permits online. This new process automates Parking Services' back-end process, including permit applications, lot assignments, waitlists, and awards, saving many hours and gives Parking personnel more time to dedicate to value-added tasks and provide better customer services to students, faculty and staff.

## **6. Factbook**

Western has continued development on the Factbook, updating public pages on the Institutional Research website. The Factbook is a compilation of basic information including student enrollment, faculty, courses and degree production, and is increasingly used by administrators and academic departments for strategic decision making. We have also continued development of the Combined Course Information System (CCIS). The CCIS is an integrated database consisting of student course enrollment, instructor teaching assignment, HR payroll records, and departmental operating expenditure. This project aims to assist university administrators in assessing the efficiency and effectiveness at an academic program, departmental, or institutional level.

## 7. Purchasing Card (P-Card)

Improved the administrative process of the P-Card program and expanded the use to include foreign and domestic travel, and other commodities

## 8. Financial Aid Efficiencies

Automated the development, review, and correction of highly detail-oriented student aid records, providing valuable time savings in processing financial aid awards to better ensure that students receive the correct amount and type of aid at the time it is needed. Efficiencies include:

- ◆ **Status Change Report Automated:** Thousands of student aid records are processed each year. With a fluid student population and family financial circumstances that change, many of the student aid records have data elements that change. Until recently a manual process was used to identify and review each of the changed records. The manual process has now been replaced by a nightly computer program batch job that automates the identification of changed records for counselor review. This new efficiency saves an estimated 260 hours of staff time per year.
- ◆ **Data Load Comparison Job Automated:** Financial aid processing software produces a Data Load Comparison Report. The comparison report provides an alert that something has changed on a student FAFSA record. The manual process to review each changed record line-by-line was laborious, tedious and time consuming. New computer programming has automated the data record comparison so that records needing financial aid counselor review are immediately identified and flagged, allowing for student financial aid award corrections to be processed in a more timely manner. The Financial Aid Department is saving an estimated 850 hours per year with this valuable automation effort.
- ◆ **Algorithmic Budgeting Implemented:** A long-sought improvement was made in the 2015-2016 Banner financial aid enterprise software. The department saves 16 hours per year using a new period-based algorithmic process for development cost of attendance student budgets. Rather than having to manually data input each and every cost component into every single budget, the cost components are input once. Algorithmic rules then populate the wide variety of student budgets with accurate cost component. While the time saved is modest, the new automated format is easier to maintain and less prone to error.

*Efficiencies Achieved, 2014-2015*