

**University of Kansas**  
**Changing for Excellence**  
KUMC Town Hall Meeting  
August 26, 2011

Experience. **Redefined.**<sup>®</sup>

# Discussion points

The purpose of today's meeting is to update the KUMC community on the *Changing for Excellence* project and answer questions regarding next steps.

- Project status update
- Plans for Phase II
- Overview of areas selected for business case development
- Questions and discussion

# Phase I – goal

The goal of Phase I was to develop a menu of potential opportunities, with a subset selected for further analysis and feasibility assessment in Phase II.

- The Phase I menu identified numerous opportunities aimed at increasing revenues, reducing costs, increasing service effectiveness, and enhancing processes and services:
  - Quantify potential opportunity ranges
  - Identify service enhancement opportunities
  - Discover areas for process improvements
- Identified opportunities included both labor and non-labor categories

Phase I led to an initial list of potential opportunities to further develop in Phase II. The feasibility and implementation planning studies (business cases) developed during Phase II will provide KUMC leadership with information to help decide whether to take any of the ideas forward.

# Phase I – activity summary

Huron worked with the established governance committees and other key institutional stakeholders to arrive at the menu of opportunities.

- **Interviews & focus groups**
  - ~115 stakeholders were interviewed (individual and focus group meetings)
- **Town hall meetings**
  - KUMC town hall on July 5<sup>th</sup>
- **Project governance meetings**
  - Bi-weekly meetings with the Executive and Advisory committees
- **Project sponsor meetings**
  - Weekly meetings with Project Sponsors
- **Changing for Excellence e-mail box**
  - Dedicated address ([changingforexcellence@kumc.edu](mailto:changingforexcellence@kumc.edu)) to solicit ideas from the community

# Phase I – overview of project governance

During Phase I, Huron worked with KUMC stakeholders and met bi-weekly with the KUMC Advisory Committee and the Project Executive Committee.

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## KUMC Project Advisory Committee

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Jim Bingham  
Marge Bott  
Jim Cooper  
Winnie Dunn  
Sam Enna  
Debbie Ford  
Shelley Gebar, Chair  
Rick Johnson  
Mike Keeble  
Greg Kopf  
Chris Lyon  
Chris McCracken  
Kim Meyer  
Tyann Orton  
Ed Phillips/Steffani Webb  
Don Rau

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## Project Executive Committee

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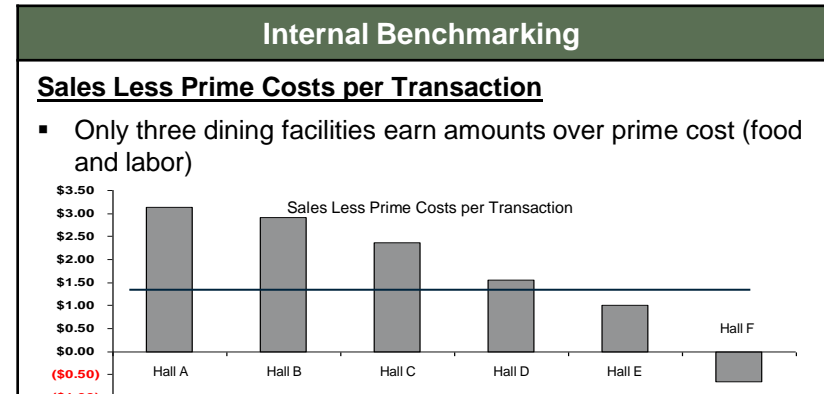
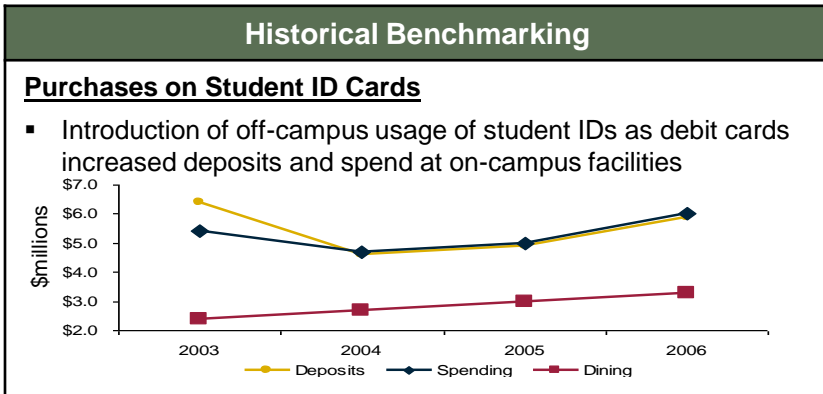
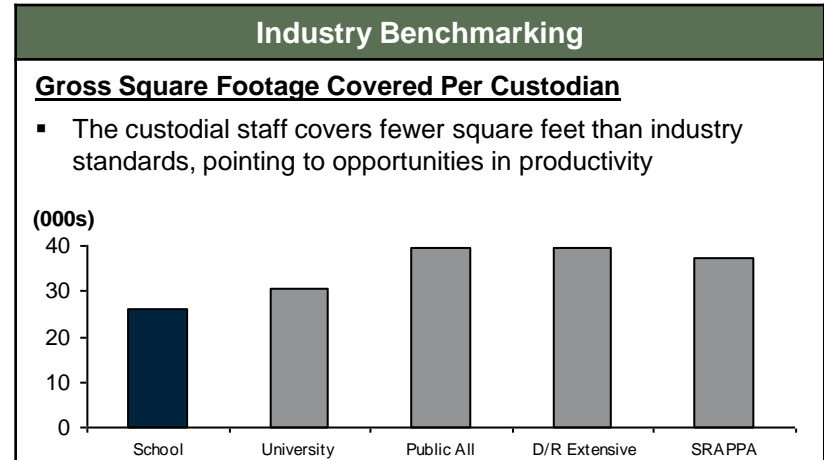
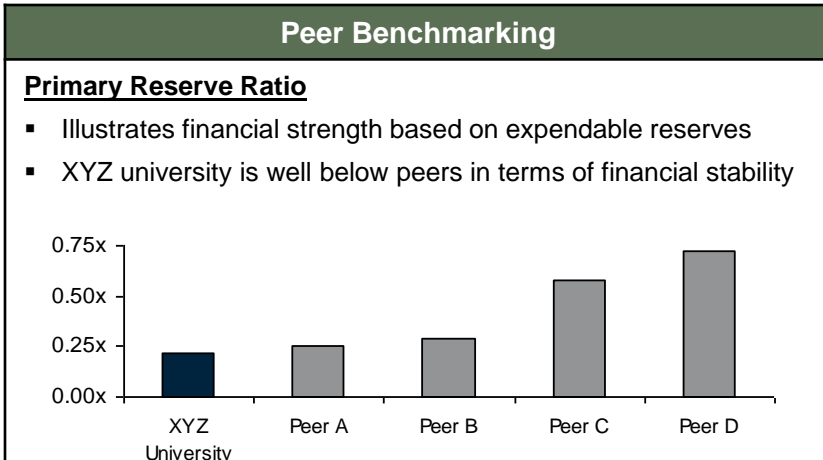
Barbara Atkinson  
David Cook  
Shelley Gebar (new member for Phase II)  
Diane Goddard  
Theresa Gordzica  
Bernadette Gray-Little  
Paul Koch  
Jeffrey Vitter  
Steffani Webb

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For Phase II, the Executive Committee will remain in place (with the addition of Shelley Gebar, while the Advisory Committee will be changed to reflect the areas of focus for the business cases.

# Phase I – examples of benchmarking

Benchmarking provided quantitative analyses and directional insights essential to the initial identification and prioritization of opportunities.



The findings from benchmarking will be expanded upon during Phase II to provide more precise estimates of savings opportunities and institutional impacts.

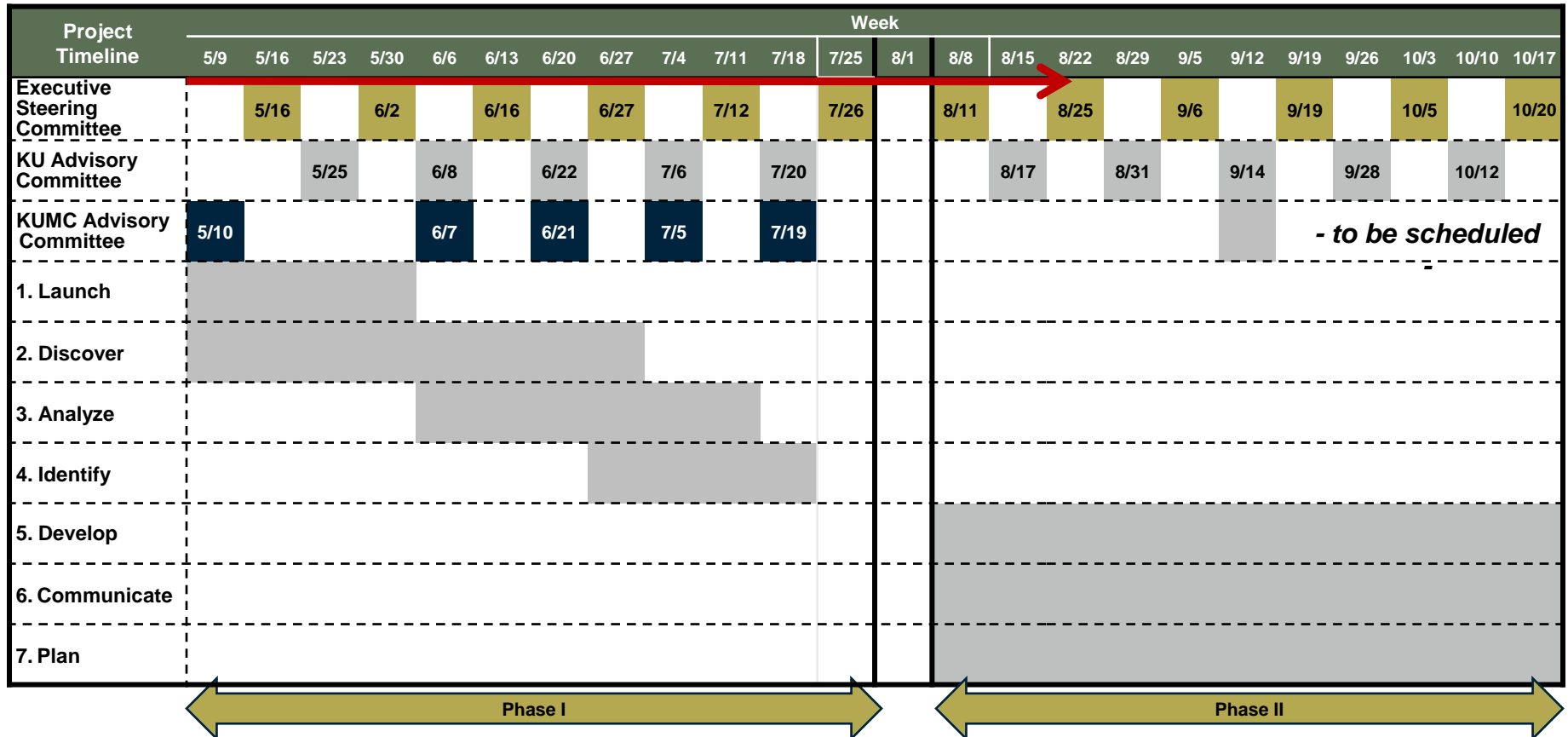
# Phase I – information review/analysis

Huron utilized a number of primary and secondary data sources to facilitate the benchmarking and assessment activities in Phase I.

<p><b>Huron Proprietary Data</b></p> <ul style="list-style-type: none"> <li>• Database of past opportunities</li> <li>• Ratio analysis</li> <li>• Key performance metrics</li> <li>• Subject matter advisors</li> </ul>	<p><b>Internal Data Requests</b></p> <ul style="list-style-type: none"> <li>• Actual financial data</li> <li>• Budgetary data</li> <li>• Organizational charts</li> <li>• Position descriptions</li> <li>• Training documents</li> <li>• Process maps</li> </ul>	<p><b>Meetings and Interviews</b></p> <ul style="list-style-type: none"> <li>• One-on-one staff interviews</li> <li>• Focus groups</li> <li>• Huron’s proprietary network of contacts (external)</li> </ul>
<p><b>Public Research</b></p> <ul style="list-style-type: none"> <li>• Websites</li> <li>• Annual reports</li> <li>• Employee directories</li> <li>• Organizational charts</li> <li>• Process maps</li> <li>• Policy inventories</li> </ul>	<p><b>Surveys</b></p> <ul style="list-style-type: none"> <li>• IT survey</li> <li>• Administrative survey</li> <li>• Additional surveys to be conducted in Phase II</li> </ul>	<p><b>Industry Data</b></p> <ul style="list-style-type: none"> <li>• Association of Higher Education Facilities Officers (APPA)</li> <li>• Integrated Postsecondary Education Data System (IPEDS)</li> <li>• College &amp; University Professional Association for Human Resources (CUPA)</li> <li>• Delaware Study data</li> </ul>

# Project status update – timeline

Phase II, designed around Executive Committee decisions, launched August 15 and will run for 9 - 10 weeks.



In addition to Advisory Committee and Executive Steering Committee meetings, Huron meets weekly with the project sponsors at the KU-Lawrence campus and KUMC to provide status updates.

# Project status update – Phase II feasibility plans

The Executive Steering Committee has selected the following 12 opportunity areas for further assessment during Phase II.

Opportunity Area	Lawrence/Edwards	KUMC
Administrative support		✓
Budgeting process	✓	
Campus construction	✓	✓
Creation of business centers	✓	
Enrollment management	✓	
Facilities maintenance and upkeep (separate cases for KU-Lawrence and KUMC campus)	✓	✓
Human resources	✓	✓
Information technology	✓	✓
Libraries	✓	✓
Procurement	✓	✓
Research administration (separate cases for KU-Lawrence and KUMC campus)	✓	✓

# What is a feasibility plan/business case?

A business case further refines the opportunity by utilizing additional detailed analysis, combined with a feasibility assessment and implementation planning.

- **Refinement of opportunity**
  - Process mapping (where applicable)
  - Recent trends in operating environment
  - Sources and uses of resources, including key drivers of performance
  - Qualitative assessments (e.g., cultural and implementation considerations)
- **Feasibility analysis**
  - Supporting analytics are used to determine the financial impact of each recommendation (e.g., investments require, timing of financial impact)
  - Assessments are made in terms of service levels and risk exposures
- **Implementation planning**
  - Communications planning
  - Implementation road-map
  - Key milestones

# Plans for phase II – project structure for Huron team

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## Project Leadership

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John Curry  
Shandy Husmann  
James Knight  
Mike Phillips  
Kathleen Shaw  
Derek Smith

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## Project Delivery

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Aamer Ali  
Floyd Barnett  
Andrew Billing  
Megan Cluver  
Peter Fritz  
Miklos Gaal  
Andrew Gower  
Patrick Higley  
John Kaiser  
James Krause  
John Kennedy  
Michael Kenney  
Shabaki Lambert  
Donna McKee  
Nina Pukonen  
Saumil Patel  
Snow Rutkowske

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# Advisory committee and area champions

The area champions will also represent their respective work groups by participating as members of the Phase II KUMC Advisory Committee.

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## KUMC Phase II Advisory Committee

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|--------------------|----------------------|
| • Barbara Atkinson | • Don Rau            |
| • Jim Bingham      | • Priscilla Reckling |
| • Heidi Chumley    | • Dave Roland        |
| • Shelley Gebar    | • Steve Scanlon      |
| • Doug Girod       | • Michael Soares     |
| • Teri Lester      | • Paul Terranova     |
| • Rosa Meagher     | • Terry Turner       |
| • Kim Meyer        | • Steffani Webb      |
| • Karen Miller     |                      |
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## KUMC Phase II Area Champions

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<b>Administrative support</b>	Rosa Meagher
<b>Campus construction</b>	Dave Roland
<b>Facilities maintenance and upkeep</b>	Don Rau
<b>Human resources</b>	Priscilla Reckling
<b>Information technology</b>	Jim Bingham
<b>Procurement</b>	Steve Scanlon
<b>Research administration</b>	Teri Lester

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# Plans for Phase II – communications

Communication with a broad array of campus stakeholders will continue during Phase II.

## Workgroups

- KUMC individuals assigned to each business case
- Regular meetings with the Huron team
- Contributors to the implementation plan

## Town Hall Meetings

- Broadcast to KUMC– Salina and Wichita campuses
- Video feed provided online following the meeting

## Changing for Excellence Website

- Prominent location on main KU page
- Includes:
  - FAQ's
  - Calendar of events and meetings
  - Chancellor's message

## KUMC Champion

- KUMC individual assigned to each business case
- Workgroup or campus lead for cross-campus initiatives

## KUMC Advisory Committee

- Meeting schedule to be determined

# Plans for Phase II – key deliverables

For each of the business cases, Huron will deliver a single PowerPoint document with supporting schedules, encompassing the following areas.

## Recommendations

- Current state
- Opportunity
- Risk to the institution
- Change readiness assessment:
  - Organizational resistance
  - Barriers to implementation

## Net Benefits (cost/ benefit analysis)

- Incremental financial impact (net of implementation costs) across 1, 3 and 5 years
- Net present value (NPV) for long-term initiatives

## Implementation Roadmap

- Implementation approach and action plan
- Clear assignment of primary responsibility
- Progress framework
- Key milestones

## Individual Opportunity Status Report and Initiative Dashboard

- Template for project managers to report on the status of individual activities and tasks
- Summary for Executive Committee ongoing review

## Communication Plan

- Key stakeholders
- Communication goals
- Information needs
- Key dependencies
- Responsible individuals

# Administrative support

Changes in administrative support for faculty could realize a minimum of \$280K in savings for KUMC while enhancing services provided.

## Goals

- Redefine roles and responsibilities of administrative staff
- Provide streamlined processes and technology to support staff capabilities
- Realign the distribution of administrative staff across the schools and departments to better support needs of faculty and school leadership

# Facilities maintenance and upkeep

Huron identified opportunities related to facilities maintenance and upkeep at the KUMC campus of at least \$3.9M.

## Goals

- Revise the maintenance structure
- Reduce facilities administration cost and streamline administrative processes to improve efficiency and enhance quality
- Decrease maintenance costs without affecting quality of services provided, and develop service level agreements among clients
- Increase maintenance worker productivity
- Reduce energy consumption

# Research administration

Huron identified opportunities at the KUMC campus related to research administration of at least \$290K.

## Goals

- Determine appropriate pre- and post-award work load for research administration staff and resize accordingly
- Realign research administration staffing balance between pre- and post-award
- Resize research administration staffing levels within the Schools as appropriate to meet needs of faculty and support research goals

# Campus construction

Huron identified savings opportunities across campuses related to campus construction of at least \$2.9M.

## Goals

- Realize cost savings through improved sourcing practices and audit recoveries
- Realize cost savings through process improvement
- Improve budget control and financial reporting
- Heighten compliance with contractual obligations and University policies
- Establish policies and tools to facilitate project management
- Create cost transparency to provide assurance to stakeholders (donors, lenders, senior administration, etc.)

# Human resources

Huron identified opportunities across campuses related to human resources of at least \$2.25M.

## Goals

- Create a strategic role for HR
- Redesign the organizational chart to include all critical HR functions
- Streamline HR processes and increase HR workflow
- Implement employee self-service options
- Implement a performance management process for unclassified staff and enhance existing performance management capabilities
- Establish operational and strategic performance metrics to assist the HR department in measuring contributions to institution strategy
- Standardize job descriptions and create salary bands across the Lawrence/Edwards campus

# Information technology

Huron identified opportunities across campuses related to information technology of at least \$5.7M.

## Goals

- Centralize and virtualize servers maintained remotely across campus
- Reorganize campus technology liaisons
- Increase the use of multi-function devices
- Reassess responsibilities of departmental IT staff
- Centralize identity management and network management solutions for all KU campuses
- Leverage combined buying power of all campuses to negotiate more favorable deals with software vendors

# Libraries

Huron indentified opportunities across campuses related to libraries of at least \$2.1M.

## Goals

- Reassess library staffing and key service levels
- Expand Purchase on Demand to reduce the acquisition cost of monographic materials
- Assess the use of journals purchased as part of “big deal” bundles to produce more effective collections spend
- Offer storage space in the Annex to non-KU institutions
- Re-assess library fines
- Consolidate Library back office functions across campuses

# Procurement

Huron identified opportunities across campuses related to procurement of at least \$1.6M.

## Goals

- Focus purchasing staff on commodity management and strategic sourcing activities and increase collaboration on supplier contracts
- Optimize technology and operations to address the drivers behind the low utilization and efficiencies of procure to pay technologies
- Share procurement/payables technology (all or partial) to automate processes and reduce involvement in routine transactions
- Increase collaboration among the procurement organizations in strategic sourcing activities, sharing supplier contracts and leveraging commodity experience

# Questions & answers

What questions do you have?

## **Huron Team Contact Information:**

**John Curry:** [jcurry@huronconsultinggroup.com](mailto:jcurry@huronconsultinggroup.com)

**Kathleen Shaw:** [kshaw@huronconsultinggroup.com](mailto:kshaw@huronconsultinggroup.com)

## **Changing for Excellence Website:**

<http://chancellor.ku.edu/changingforexcellence/index.shtml>

## **KUMC Changing for Excellence Dedicated Email Address:**

[changingforexcellence@kumc.edu](mailto:changingforexcellence@kumc.edu)

## **Huron “open forum” office hours – Varnes Center, Room 4023:**

Tuesday: 4 – 5 pm

Wednesday: 10 – 11 am

# **Appendix: Phase II Work Groups**

# Phase II work groups

Work Group	Members
<b>Administrative Support</b>	<ul style="list-style-type: none"><li>• <b>Rosa Meagher (Champion)</b></li><li>• Dwayne Boettcher</li><li>• Pat Dean-Love</li><li>• Hinano DeBarthe</li><li>• Adam Keener</li><li>• Erin Manuel</li><li>• Elwanda Richardson</li><li>• Bobbi Sidorenkov</li><li>• Lori Wade</li></ul>
<b>Construction</b>	<ul style="list-style-type: none"><li>• <b>Dave Roland (Champion)</b></li><li>• Don Rau</li><li>• Tommie Sauls</li><li>• Steve Smallwood</li></ul>
<b>Facilities Maintenance &amp; Upkeep</b>	<ul style="list-style-type: none"><li>• <b>Don Rau (Champion)</b></li><li>• Jim Cooper</li><li>• Ronn Fowler</li><li>• Greg Franklin</li><li>• Kevin Growney</li><li>• Vilma Zolynas</li></ul>

# Phase II work groups

Work Group	Members
<b>Human Resources</b>	<ul style="list-style-type: none"><li>• <b>Priscilla Reckling (Champion)</b></li><li>• Tom Field</li><li>• Todd Lewis</li><li>• Chris Lyon</li><li>• Cheryl Pace</li><li>• Bobbi Sidorenkov</li><li>• Terry Turner</li><li>• Ed Wilson</li><li>• Krista Wimberly</li></ul>
<b>Information Technology</b>	<ul style="list-style-type: none"><li>• <b>Jim Bingham (Champion)</b></li><li>• Matt Fuoco</li><li>• Tom Knapp</li><li>• Erin Manuel</li><li>• Cheryl Pace</li><li>• Steve Scanlon</li><li>• Steve Selaya</li></ul>

# Phase II work groups

Work Group	Members
Libraries	<ul style="list-style-type: none"><li>• <b>Karen Cole (Champion)</b></li><li>• Ken Davis</li></ul>
Procurement	<ul style="list-style-type: none"><li>• <b>Steve Scanlon (Champion)</b></li><li>• Deborah Alspaugh</li><li>• Tim Love</li><li>• Kathy McEachron</li><li>• Janie Meeker</li><li>• Rebecca Potter</li></ul>
Research Administration	<ul style="list-style-type: none"><li>• <b>Teri Lester (Champion)</b></li><li>• Karen Blackwell</li><li>• Mei-shya Chen-Su</li><li>• Molly Gunter</li><li>• Susan Harp</li><li>• Anita Macan</li><li>• Lori O'Neal</li><li>• Holly Smith</li></ul>

**Huron**  
CONSULTING GROUP

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