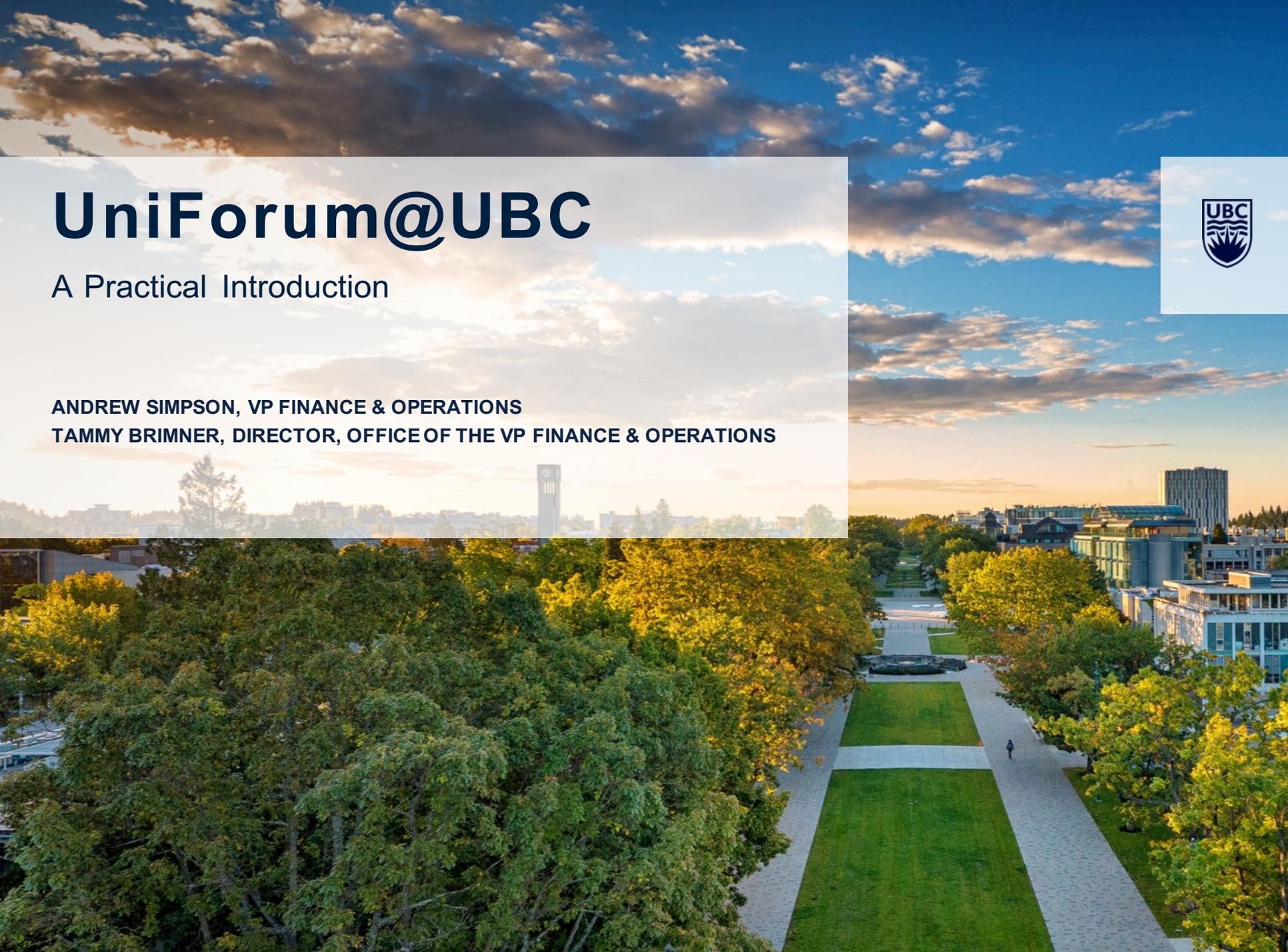


UniForum@UBC

A Practical Introduction

ANDREW SIMPSON, VP FINANCE & OPERATIONS

TAMMY BRIMNER, DIRECTOR, OFFICE OF THE VP FINANCE & OPERATIONS



WHAT IS UNIFORM?

- UniForum is an annual study providing UBC information about the distribution of the services and activities that support our academic mission and its respective resourcing, which can be benchmarked against other leading universities around the world.
- The UniForum program now has 42 participating post-secondary institutions worldwide—24 universities in Australia and New Zealand and 18 in the United Kingdom.
- Feedback from these institutions about the value gained from the study is impressive, and has led to the widespread improvement in services in many universities.



UNIFORM IS SERVING UBC'S ACADEMIC MISSION

As UBC begins its second century, and as we consider the strategies that will lead us to even greater success, this is a time for us to reflect on how we can best enable academic, research and student success, and the world leading outcomes that UBC achieves. Across UBC, in central services teams, Faculty offices, and within departments, people are striving to support faculty and students in the delivery of our academic mission.

This is no easy task. In a large, broad-based, and decentralized organization such as UBC, the structures and processes we have today may have evolved over many years (sometimes even decades). This will involve us all in thoughtful conversations across the whole organization, with everyone considering many of our services and activities.

In this process, one of the questions I sometimes pose to leaders and teams is: “If we were establishing a new university today, how would we implement the delivery of the services you are responsible for?” While difficult to contemplate, this question poses a great opportunity to consider how we might enhance not only the outcomes of our service delivery, but also the satisfaction of both the academic and student community and those providing services.

With thoughtful dialogue and analysis I am confident that as we begin this next chapter in the life of UBC, we will be better able to support and enable our academic colleagues and students, through reimagined and improved levels of services.

—Andrew Simpson, VP Finance & Operations



WHY ARE WE IMPLEMENTING UNIFORM?

- We are participating in UniForum, an annual data collection process, to better understand—at an organizational level—how we deliver which services, where those services are, and how those services are most-effectively aligned to our academic mission of teaching, research, enhancing the student experience, and community engagement.
- The UniForum process will also allow us to benchmark against other universities of similar scale and complexity, and develop best practices from experiences across participating institutions.
- The information we gather will be a resource for many conversations to come, not an answer in and of itself. The best decisions will require meaningful conversations about the information we gather and how we can use it to best support our learning, work, and the strategic priorities of UBC.
- In the fall, we will begin a series of conversations to explore what the data suggests and how it can be used.



WHO IS LEADING THE UNIFORM@UBC PROCESS?

Executive Sponsor

- VP Finance & Operations – Andrew Simpson

Steering Committee

- VP Finance & Operations – Andrew Simpson
- VP Human Resources – Lisa Castle
- Provost and VP Academic – Anji Redish
- Associate VP Finance & Operations Okanagan – Rob Einarson
- Executive Director Finance & Operations, Faculty of Medicine – Michael Shakespeare
- Assistant Dean, Faculty of Arts – Gerald Vanderwoude
- Chief Data Officer – Marcela Hernandez
- Director, Internal Communications – Kate Hunter
- UniForum@UBC Program Manager, Director, VP Finance & Operations – Tammy Brimner

Advisory Committee – advisors to the project team, meets on an ad hoc basis

Implementation Team

- UniForum@UBC Program Manager & Director, VP Finance & Operations – Tammy Brimner
- Manager, Special Projects – Kirin Jeffery
- Senior Manager, Communications – Chris Freek
- Communications Specialist – Melissa Baluk
- Workforce Strategist, HR Workplace Learning & Engagement – Stuart Murray
- Compensation Consultant, HR Compensation – Philippa Wagner
- Workforce Analyst, HR Workforce Learning & Engagement – Tanja Maier
- Director, Finance Operations, UBC Okanagan – Carri Lawrence



THE PROCESS: STEP 1

In UniForum, information is gathered through a two-step process:

1. The **Service & Activity Data Collection Program** looks into 14 functions and their associated services & activities, provided by both suppliers and the University. Our goal is to better understand—at an organizational level—how we deliver which services and where those services are.

- | | |
|------------------------------------|--|
| 1. Governance - 13 | 9. Library - 7 |
| 2. Human Resources - 6 | 10. Teaching Administration - 3 |
| 3. Finance - 8 | 11. Teaching Design, Development & Delivery - 10 |
| 4. General Administration - 6 | 12. Research Administration - 6 |
| 5. Information Technology - 23 | 13. Research Facilities & Support - 4 |
| 6. Facilities Management - 13 | 14. Other Activities - 9 |
| 7. External Engagement - 21 | |
| 8. Student Support & Services - 21 | |

Note: the number reflects the number of services & activities within that function



SAMPLE ACTIVITY FRAMEWORK APPLICATION

| Activity Code | Description | Annualized Percentage of Time |
|---------------|---|-------------------------------|
| GO03 | Manage staff | 10% |
| GO09 | Institutional reporting – internal | 40% |
| GO10 | Institutional reporting – external | 10% |
| GO15 | Benchmarking | 10% |
| EE10 | Develop & maintain relationships – other higher ed institutions | 10% |
| HR07 | Advice on staffing | 20% |



THE PROCESS: STEP 2

2. The **Service Satisfaction Survey** provides a closer look at end-users' and service providers' satisfaction levels with our core services. 35 of the 65 core services identified as part of the program will be surveyed in the first year, with the remainder covered in future years of the program.

One more optional step

There will also be a short, optional questionnaire for all participants after the Service & Activity Data Collection Program and Service Satisfaction Survey have been completed. This will provide feedback to the Executive and Steering Committee on the UniForum@UBC program experience.



KEY ROLES

Program Manager (Tammy Brimner, VPFO)

- Coordinates activity across UBC and reviews all information gathered for completeness
- Liaises between executive sponsor, steering committee, and implementation team

Primary Contact (Directors)

- Identifies and supports Respondents
- Quality checks provided information for completeness
- Ensures timely completion

Respondent (Managers and Directors only)

- Utilizes the Activity Framework to complete service and activity allocations for all their direct reports
- Submits Service & Activity Data Collection within the collection period

Function Reviewer (VPs or delegates)

- Responsible for the final review of the service and activity allocation for their functional area e.g. HR, Finance

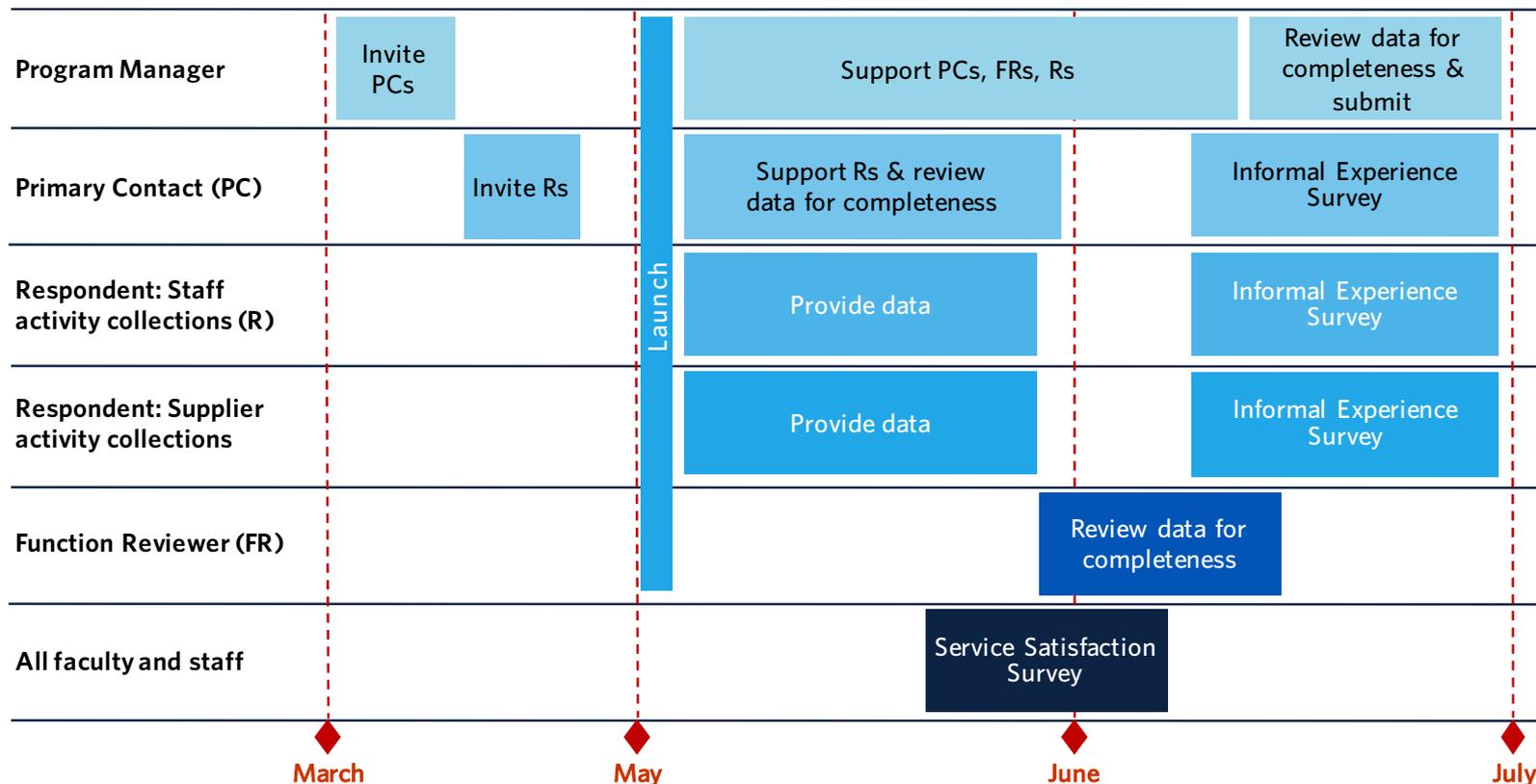
Satisfaction Survey Respondent (all Staff and Faculty)

- Staff and faculty answer questions about their satisfaction with 35 support services
- 15 minutes time commitment on average



UNIFORM@UBC TIMELINE

- The Service & Activity Data Collection will take place in May 2017
- The Satisfaction Survey will take place in late May 2017
- Analyzed information will be returned to UBC in Fall 2017
- University-level results will be shared with the UBC community



WHAT COULD THE INFORMATION BE USED FOR?

Other universities have successfully used the information for:

•General service improvements

- Improving processes, policies, and procedures
- Creating programs for the continuous improvement of service delivery
- Creating networks for those doing similar activities to share experience and identify possible improvements
- Skills upgrades for service delivery teams

•Organizational change

- Informing how structures are designed and level of investment required to enable services to be delivered appropriately
- Informing decisions on the balance between investment in systems and staff
- Considering what is the best way to design jobs and career paths in order to provide satisfying roles, and opportunities for progression and manage workloads effectively
- Expanded data analysis for improved workforce planning and VP information requests

•To decide to do nothing

- Benchmarking can also indicate effective operations with appropriate levels of service satisfaction



Questions?

[Pair.ubc.ca/uniform](https://pair.ubc.ca/uniform)

Uniform.help@ubc.ca





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