



Tackling Risk Through Customer Satisfaction

Presented by:

Angela Song and Margo Simpson

Introductions

Angela Song, PhD – UCSD

Director of Organization &
Performance Assessment
(Operational Strategic Initiatives
–Bus Affairs)



Margo Simpson – IBM

Managing Consultant (Strategy
and Analytics – Finance and
Risk)



Agenda

- UCSD's Challenge
- Why ERMIS?
- Survey and Dashboard Methodology
- **Case Study:** *Health Sciences "We Heard You" Campaign*
- **Group Exercise:** *Procurements Specialized Outreach*

UCSD's Challenge

Cumbersome and manual data compilation, statistical analysis and report generation

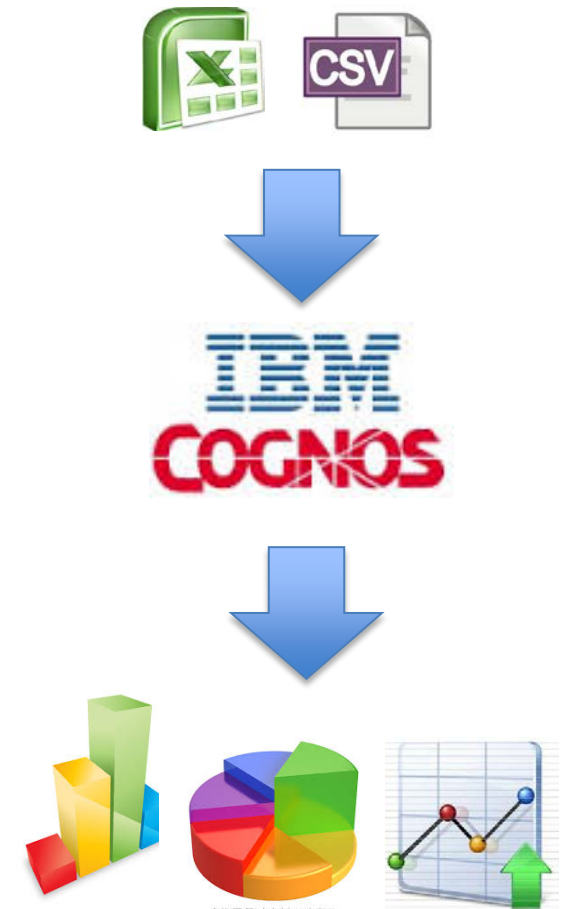
Two qualified individuals to complete work for thousands of report requests

Only able to accommodate some departments due to limited capabilities

Campus demand for the reports was growing; Angela and her team saw that the current process was not sustainable

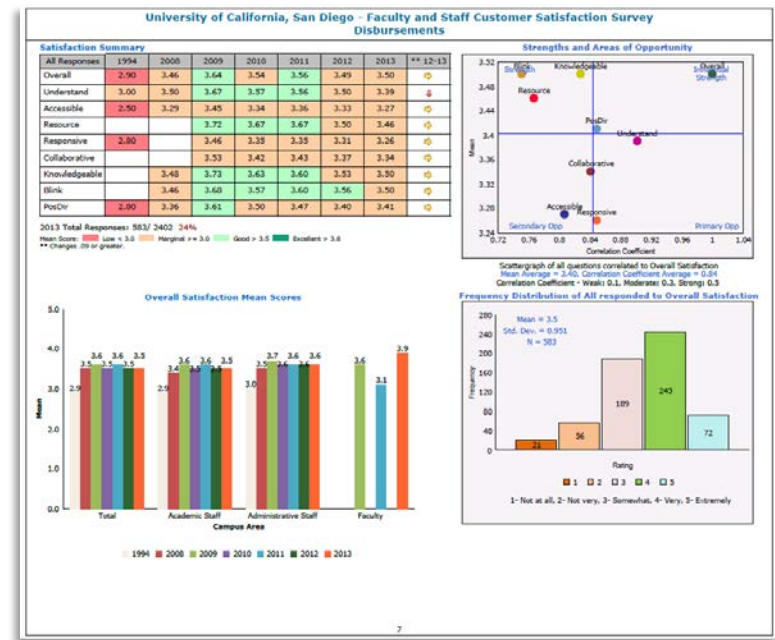
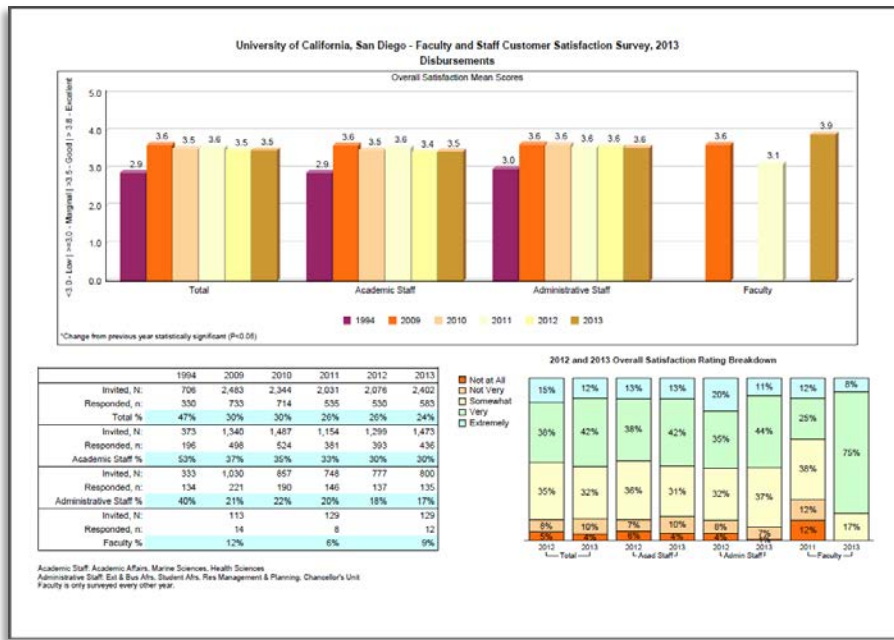
UC ERMIS Solution

- Automate the data load process
- Embed statistical analysis via SPSS software
- Generate dashboards with drill-down capabilities and actionable insight at the push of a button



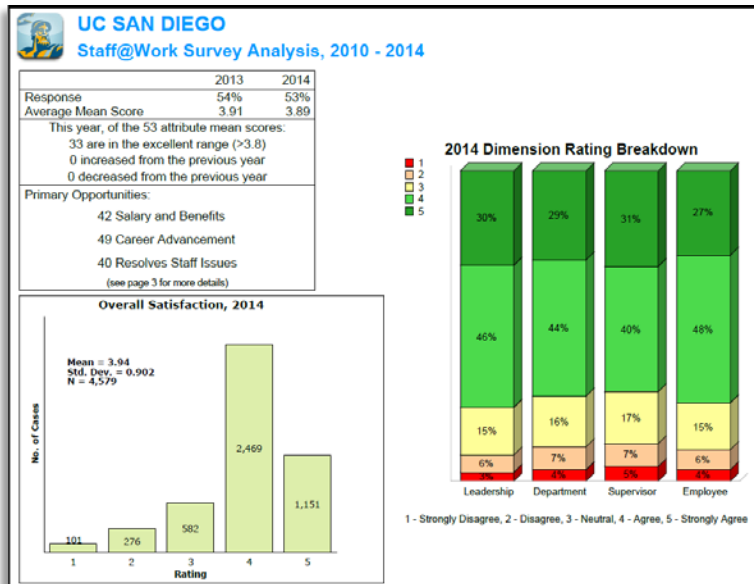
Customer Satisfaction (CSS) Dashboard

Surveys UCSD faculty and staff on customer satisfaction related to various campus services (Dining Services, Facilities Management, Parking, etc.)



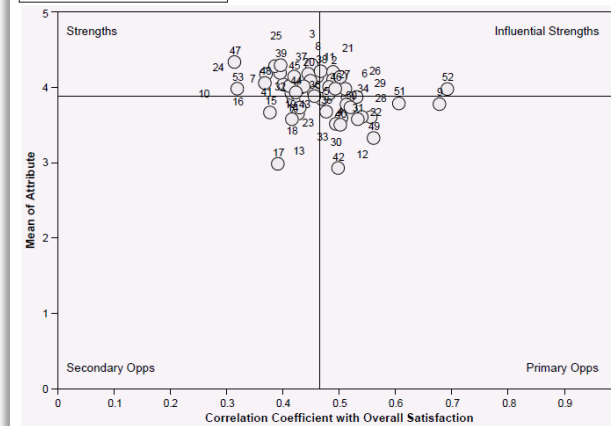
Staff@Work Dashboard

Surveys UCSD employees to gauge their satisfaction related to the leadership, their department, their supervisor and their personal experience



UC San Diego STAFF@WORK SURVEY
UC SAN DIEGO - All Respondents

2014 - n/N = 4,604/ 8,623 (53%)
 Mean Average = 3.88
 Correlation Coefficient Average = 0.46



UCSD Balanced Scorecard

- UCSD was the first university in the nation to adopt the Balanced Scorecard in 1993 and to be inducted into the Balanced Scorecard Hall of Fame in 2003
- Four Facets of the Balanced Scorecard:
 - Financial/Stakeholder
 - Internal Process
 - ***Innovation & Growth – Staff@Work Dashboard***
 - ***Customer – CSS Dashboard***



Methodology – Design Customer Sat Survey

- Designed with social science research
- Standard set of 7 questions for all services with up to 11 customized questions per service
 - Standardization allows for comparisons across services and year-on-year trending analysis
 1. Understands my needs
 2. Accessible
 3. Responsive
 4. Resolve issues
 5. Knowledgeable/professional/courteous etc.
 6. Effective use of Blink (information sharing website)
 7. Moving in a positive direction
- **Participation Rate**
 - Consistently 36-46% among services

UCSD 2013 Faculty and Staff Customer Satisfaction Survey

Friday, January 19, 2013

If you need to change your department selection or change the department you work for, please [click here](#).

Current Section 1 of 17 (Includes Background Information Section)

ACCOMMODATION COUNSELING AND CONSULTING SERVICES (ACCS) - Accommodation Counseling and Consulting Services is the division of Campus Human Resources responsible for providing disability management and job accommodation-related services to UC, San Diego faculty and staff. If you have had interaction with the Accommodation Counseling and Consulting Services (ACCS) function within the Campus Human Resources Department in the last 12 months, please answer the following questions. If not, please skip to the next section.

DIRECTION: Please answer the following questions based on a scale of "1" through "7" with "1" meaning you are "Extremely Satisfied" and "7" meaning you are "Not At All Satisfied." If an aspect does not apply to you, please mark the number "9" column, "Not Applicable."

	Extremely Satisfied 1	Very Satisfied 4	Somewhat Satisfied 5	Not Very Satisfied 7	Not At All Satisfied 9	Not Applicable 9
1. Thinking of your OVERALL experience with Accommodation Counseling and Consulting Services, how would you rate your satisfaction with it being the best it can be to facilitate a meeting your department needs?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Understands my needs and requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Accessible to customers (via phone, video mail, email, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Responsive to requests or problems within an acceptable time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Provides effective and confidential advice, support and guidance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Facilitates job accommodation process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Knowledgeable and helpful staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Effectively uses Blink to provide staff access to Accommodation Counseling and Consulting Services information and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Working in a positive direction to better meet my department's needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Usefulness of the ACCS educational courses including: Understanding Disability Through Present and Future, Job Accommodation, One Process is Quality Management, Employment Discrimination Law, Career Planning, and Agency Training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Effectiveness of the ACCS educational courses including: Understanding Disability Through Present and Future, Job Accommodation, One Process is Quality Management, Employment Discrimination Law, Career Planning, and Agency Training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide feedback that may help us improve our services.

LINK: 150 characters. Characters remaining: 1000

SEND

Methodology – Design Staff@Work Survey

- Designed with social science research and tested for internal reliability
- Reflects four factors or dimensions:
 - Leadership
 - Department
 - Supervisor
 - Employee Effectiveness
- Same set of questions for 17 years
- **Ultimate goal:**
 - Are you a satisfied UCSD employee/ Would you recommend others to work here?
 - Regression analysis to predict what drives this outcome
- **Participation Rate**
 - 96% for some areas, 53% overall

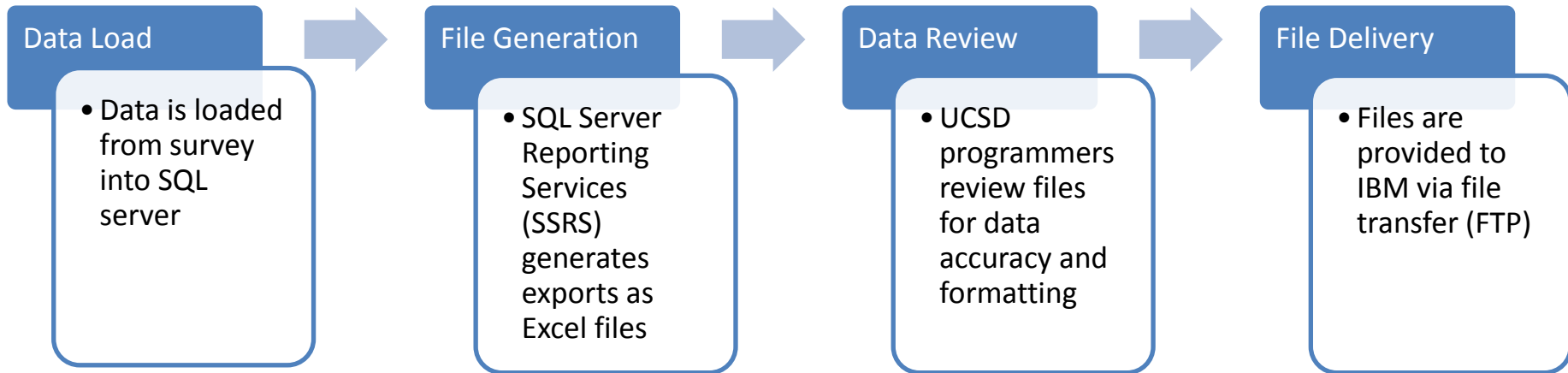
The screenshot displays the 'Staff@Work Survey' interface. At the top, it says 'U.San Diego' and 'Welcome Anonymous User'. The survey title 'Staff@Work Survey' is prominently displayed. Below the title, there are navigation links: 'Page 1 > Page 2 > Page 3 > Page 4'. A 'Blink' logo is in the top right corner, and the date 'Survey 7504 | Monday, November 19, 2012' is shown. The main content area contains a list of 13 statements, each followed by a row of seven radio buttons corresponding to the response options: 'Strongly Agree', 'Agree', 'Neutral', 'Disagree', 'Strongly Disagree', and 'N/A'. The statements are:

1. Overall, I am a satisfied UCSD employee.
2. I understand my department's mission.
3. I understand how my job contributes to my department's mission.
4. Leadership in my department communicates essential information to all levels of the organization.
5. I can make recommendations to leaders in my department without fear of negative consequences.
6. I have sufficient freedom to decide how best to perform my work.
7. Faculty members with whom I interact treat me with respect.
8. Staff members with whom I interact treat me with respect.
9. I feel valued as a member of the UCSD Community.
10. Faculty members value my contributions.
11. Staff members value my contributions.
12. I receive essential information on a timely basis.
13. My department establishes annual departmental performance goals.

At the bottom right, there are two buttons: 'Finish Later' and 'Next Page >>'. At the bottom center, there is a copyright notice: 'Copyright © 2012 Regents of the University of California. All rights reserved. U.C. San Diego'.

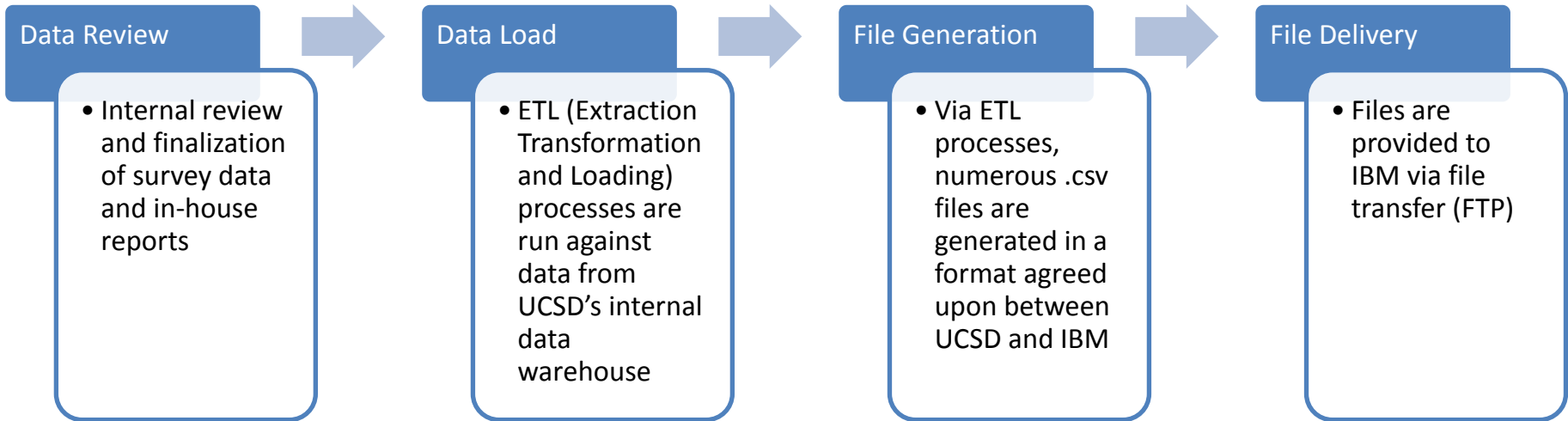
Methodology – Gather Survey Data

Customer Satisfaction Survey



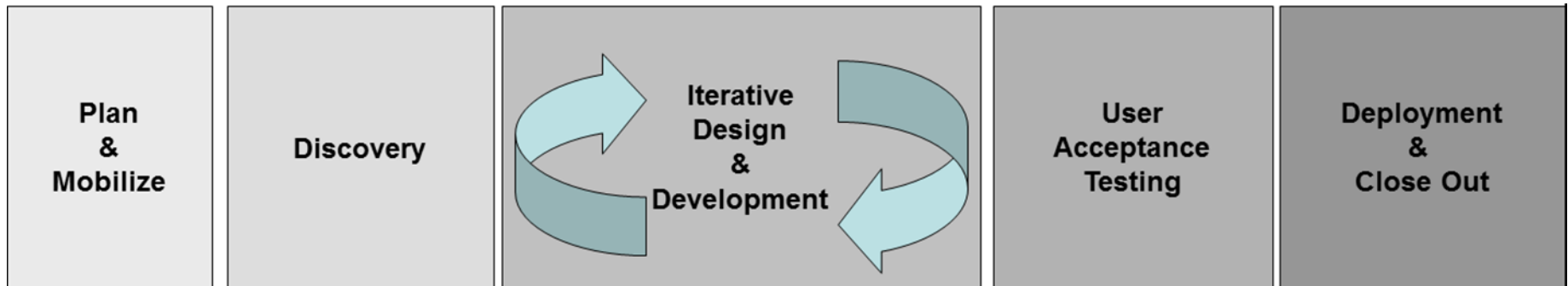
Methodology – Gather Survey Data

Staff@Work Survey



Methodology – Develop Dashboards

- **Plan & Mobilize** – Stakeholder Expectations, Scheduling, etc.
- **Discovery** – Requirements Gathering, Data Discovery
- **Iterative Design & Development** – Develop, Demo to Client, Repeat
- **User Acceptance Testing** – End users test the reports based on requirements
- **Deployment & Close Out** – Training as necessary, User Guide Development, End User Communication



Case Study: “We Heard You” Campaign



Risk Scenario: Based on FY13 Staff@Work survey results, Health Sciences Development identified 12 opportunities for improvement



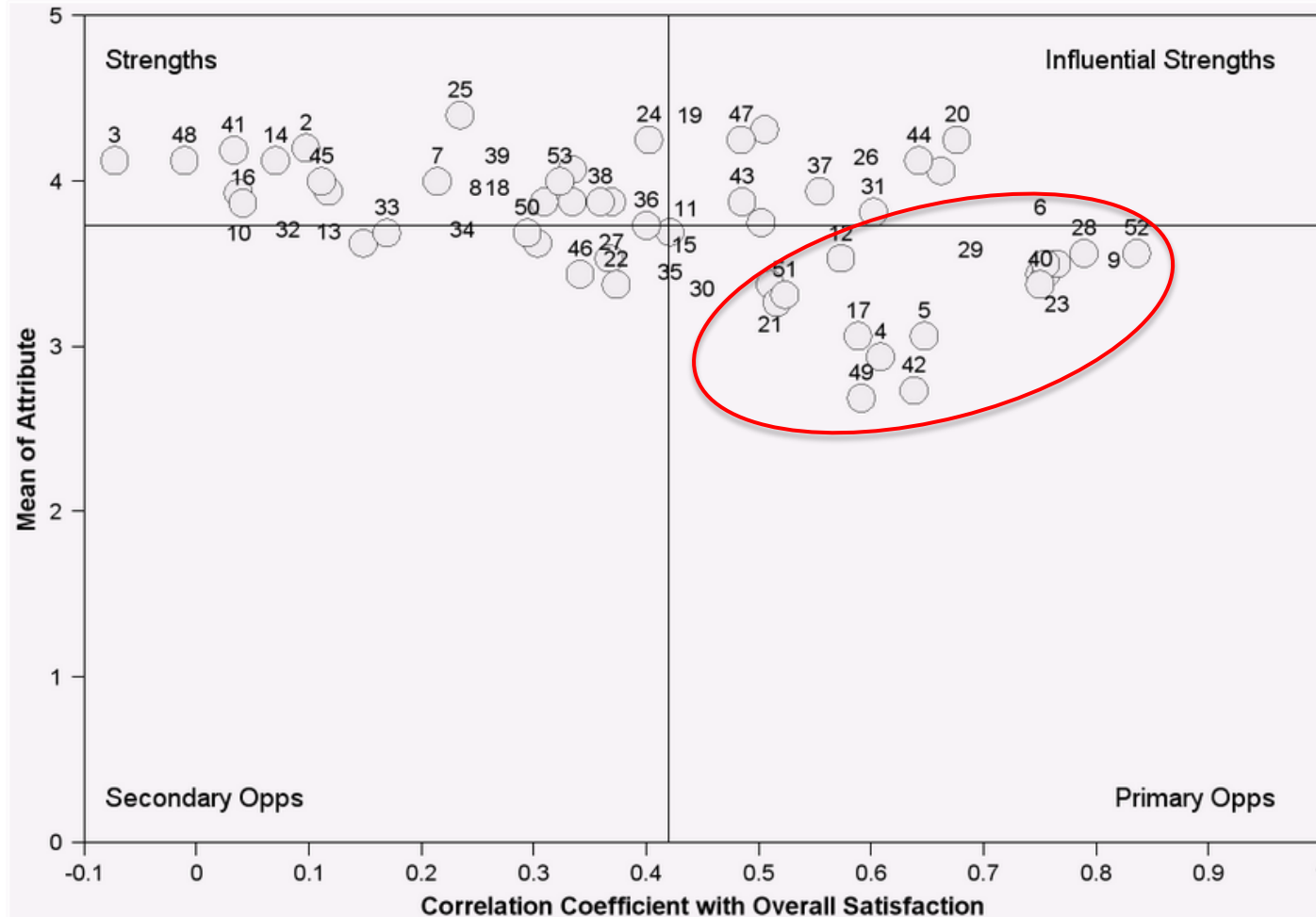
Data-Driven Action Taken: Sr. Leadership Team developed and executed comprehensive strategies to address each opportunity under the “We Heard You” campaign



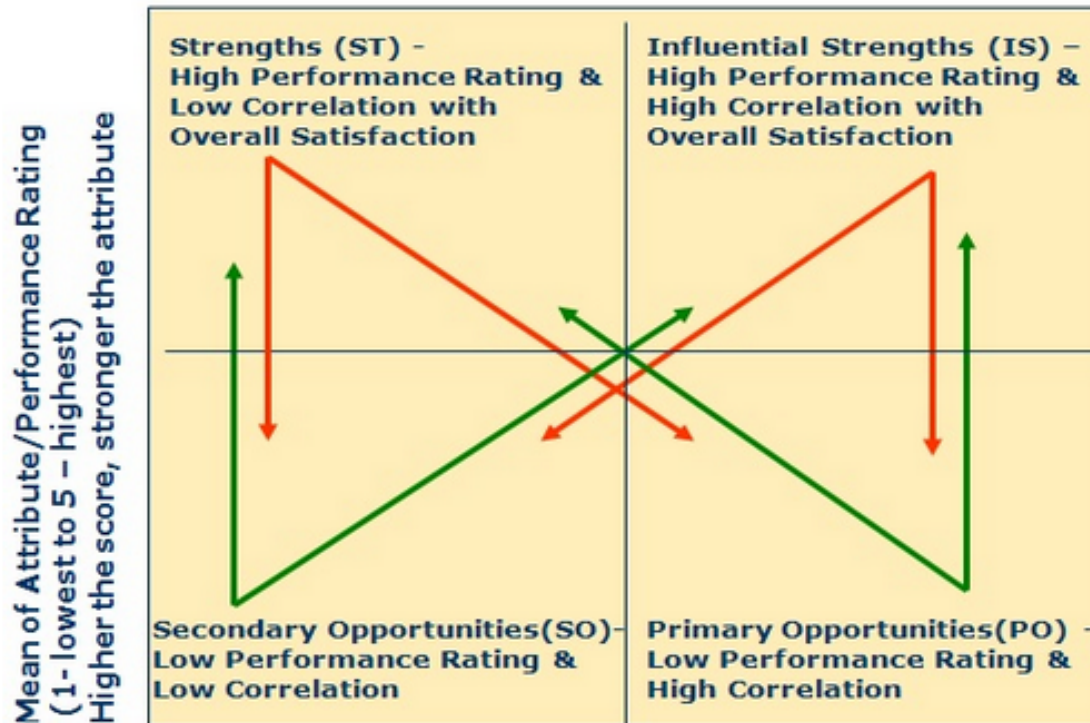
Outcome: FY14 survey results revealed significant score improvements AND the largest fundraising year for Health Sciences in the history of UC San Diego!

Case Study: Areas of Opportunity

2013 : n/N = 16/ 26 (62%)
 Mean Average = 3.73
 Correlation Coefficient Average = 0.42

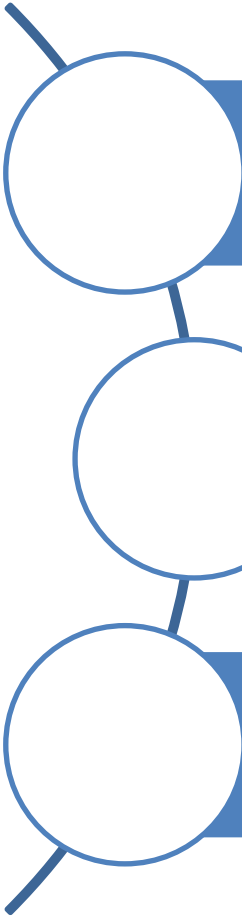


Case Study: Areas of Opportunity



Correlation Coefficient – strength of a linear relationship between an attribute and Overall Satisfaction (-1 to +1. Weak: 0.1, Moderate: 0.3, Strong: 0.5) Higher the coefficient, stronger the relationship between the attribute and Overall Satisfaction. Correlation between two variables does not necessarily imply any casual relationship.

Case Study: Data-Driven Action



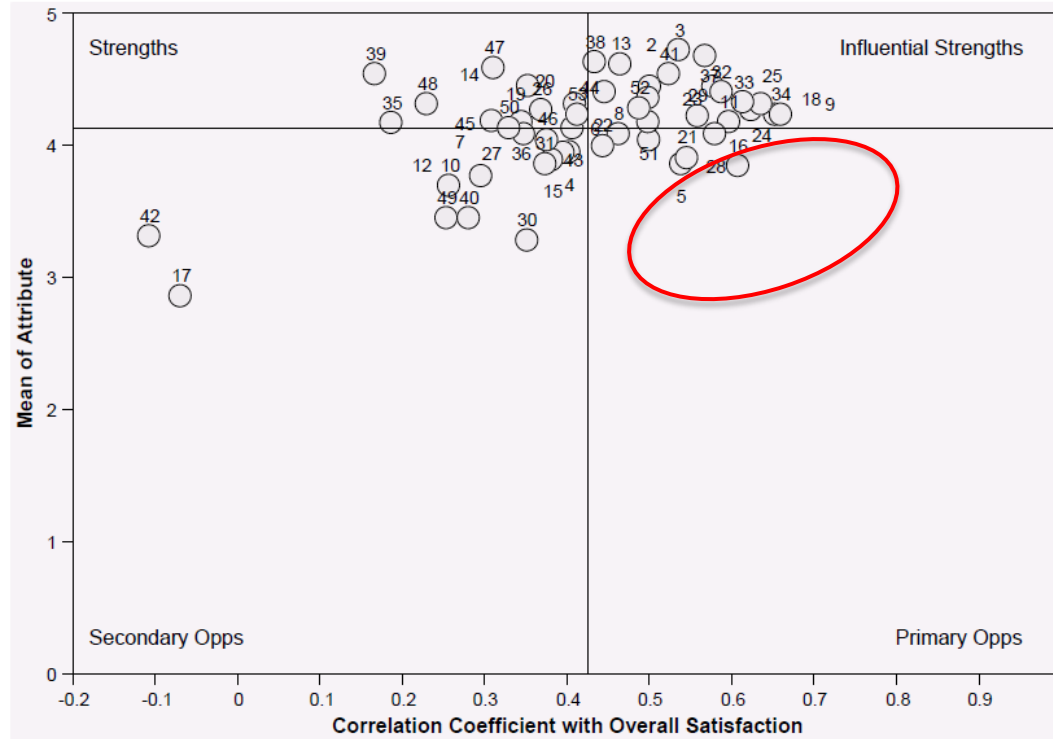
The Senior Leadership Team worked together to develop comprehensive strategies that addressed each of the identified areas.

These strategies were branded under the theme “We Heard You.”

Over the past year, the Senior Leadership Team executed each strategy while periodically reminding the entire department that “We Heard You.”

Case Study: Outcomes

2014 : n/N = 22/ 29 (76%)
 Mean Average = 4.13
 Correlation Coefficient Average = 0.42



Area: E - Employee, D - Department, L - Leadership, S - Supervisor

Area	Question	2013	2014	2014 Mean	2014 Corr
E	51 Feel Valued	PO	IS	4.18	0.50
L	11 Staff Value Contributions	IS	IS	4.18	0.60
D	29 Principles of Community	PO	IS	4.23	0.56
L	9 Valued Member	PO	IS	4.24	0.65
S	34 Evaluated Fairly	SO	IS	4.24	0.66
D	23 Balance Work/Life	PO	IS	4.27	0.62
D	18 Have Tools	ST	IS	4.27	0.62
E	52 Recommend UCSD	PO	IS	4.29	0.49
D	24 All Cultures Treated Fairly	ST	IS	4.32	0.64
S	33 Suggestions for Improvement	SO	IS	4.33	0.61
E	44 Most Perform	IS	IS	4.36	0.50
D	20 Safe Environment	IS	IS	4.41	0.45
S	32 Praise Work	SO	IS	4.41	0.59
S	37 Supports Training	IS	IS	4.45	0.50
D	25 Sexual Orientations Treated Fairly	ST	IS	4.45	0.58
E	41 Influence Community	ST	IS	4.55	0.52
D	13 Annual Dept Goals	ST	IS	4.62	0.46
S	38 Treats With Respect	ST	IS	4.64	0.43
L	2 Understands Mission	ST	IS	4.68	0.57
L	3 Understands Contribution	ST	IS	4.73	0.54
D	16 Improves Services/Products	ST	PO	3.85	0.61
L	5 Recommendations Without Fear	PO	PO	3.86	0.54
D	21 Participate in Decisions	PO	PO	3.91	0.55
D	22 Better Ways Recognized	SO	PO	4.00	0.44
L	6 Sufficient Freedom	PO	PO	4.05	0.50
L	8 Staff Respect	ST	PO	4.09	0.46
D	28 Spirit of Cooperation	PO	PO	4.09	0.58

Case Study: Outcomes

HEALTH SCIENCES DEVELOPMENT Staff@Work Survey Mean Score Trend Analysis, 2010 to 2014

		2010	2011	2012	2013	2014	13 - 14	EA 2014 Total
Department	13 Annual Dept Goals	4.1	3.7	3.8	3.94	4.62	↑	4.19
	14 Measures Dept Goals	4.1	3.6	3.6	4.12	4.45	↑	4.02
	15 Measures Customer Satisfaction	1.9	2.8	3.1	3.53	3.89	↑	3.86
	16 Improves Services/Products	1.7	2.9	2.6	3.87	3.85	→	3.91
	17 Adequate Staffing	1.3	1.9	1.3	3.06	2.86	↓	2.63
	18 Have Tools	2.7	3.6	3.1	3.88	4.27	↑	3.95
	19 Physical Environment	3.6	3.2	4.0	4.31	4.32	→	4.00
	20 Safe Environment	3.8	3.9	4.0	4.25	4.41	↑	4.27
	21 Participate in Decisions	2.6	3.3	3.7	3.38	3.91	↑	3.84
	22 Better Ways Recognized	2.2	2.8	2.8	3.38	4.00	↑	3.82
	23 Balance Work/Life	3.2	3.6	3.9	3.50	4.27	↑	3.96
	24 All Cultures Treated Fairly	3.7	4.2	4.1	4.25	4.32	→	4.22
	25 Sexual Orientations Treated Fairly	4.0	4.3	4.1	4.40	4.45	→	4.40
26 All Welcomed	3.1	3.7	3.9	4.06	4.27	↑	4.21	
27 Diverse Environment	3.7	3.7	3.7	3.88	4.19	↑	4.17	
28 Spirit of Cooperation	2.8	2.5	2.2	2.56	4.00	↑	3.90	
29 Principles of Community	3.2	3.4	3.3	3.50	4.23	↑	4.12	
Employee	41 Influence Community	4.0	4.0	4.0	4.19	4.55	↑	4.36
	42 Salary and Benefits	1.6	2.6	2.5	2.73	3.32	↑	2.90
	43 Ethical Conduct	3.6	3.8	3.4	3.88	4.14	↑	4.21
	44 Most Perform	3.9	3.7	3.5	4.12	4.36	↑	4.20
	45 Get Information	3.3	3.8	3.3	4.00	4.09	→	4.18
	46 Good Use of Skills	2.6	3.6	3.4	3.44	4.05	↑	4.01
	47 Know How To Use Tools	4.5	4.2	4.1	4.25	4.59	↑	4.33
	48 Manage Workload	3.4	3.8	3.3	4.12	4.32	↑	3.96
	49 Career Advancement	2.0	2.9	2.7	2.69	3.45	↑	3.28
	50 Valuable Training	3.2	3.2	3.5	3.60	4.14	↑	3.93
	51 Feel Valued	3.0	3.2	3.6	3.31	4.18	↑	3.90
	52 Recommend UCSD	2.3	3.5	3.2	3.56	4.29	↑	4.03
	53 Friends At Work	4.0	3.8	3.9	4.00	4.24	↑	3.99

Case Study: Outcomes



HEALTH SCIENCES DEVELOPMENT Staff@Work Survey Analysis, 2010 - 2014

	2013	2014
Response	62%	76%
Average Mean Score	3.72	4.14

This year, of the 53 attribute mean scores:

45 are in the excellent range (>3.8)

42 increased from the previous year

2 decreased from the previous year

Primary Opportunities:

16 Improves Services/Products

5 Recommendations Without Fear

21 Participate in Decisions

(see page 3 for more details)



2014



Case Study: Outcomes

- Quote from the Sr. Executive Director of Health Sciences Development:
 - *“While we know our work is not complete, the Staff@Work survey has provided a roadmap to help guide our entire team toward improved results, least of which is accomplishing the largest fundraising year for Health Sciences in the history of UC San Diego.”*

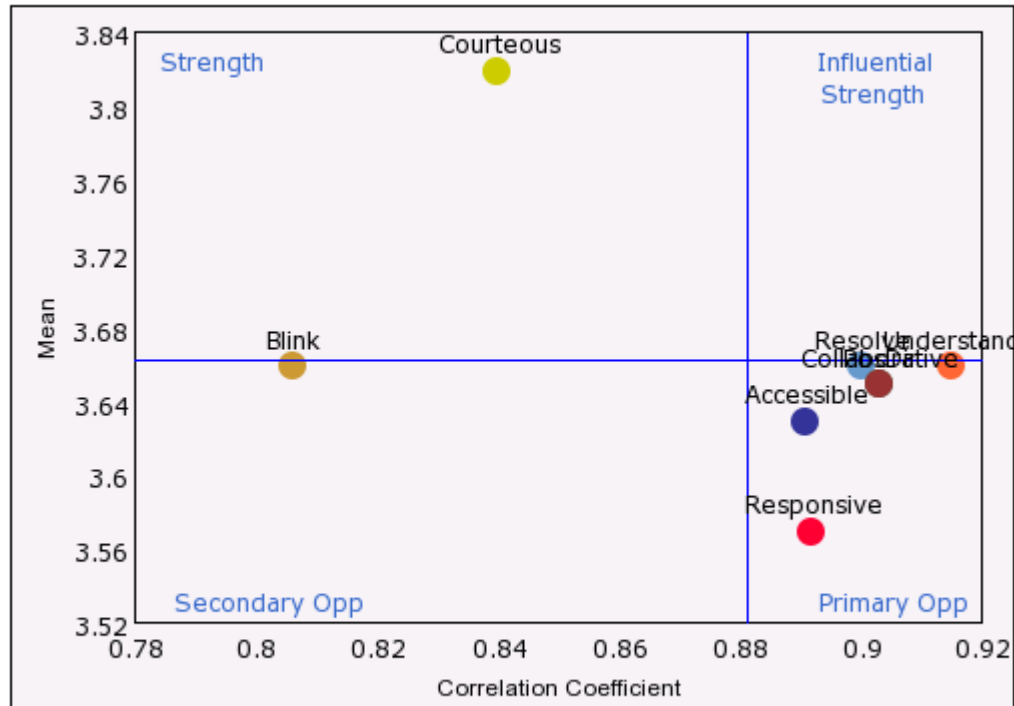
Group Exercise: Procurements

Specialized Outreach

- Risk Scenario:
 - UCSD Procurements received their annual Customer Satisfaction Survey results for FY12 and noticed that there were certain departments that were consistently rating Procurements low in the same areas.
- For the following two slides, we will break into groups and try to identify those opportunities for improvement.

Group Exercise: Can you identify the areas of opportunity?

Strengths and Areas of Opportunity



Scattergraph of all questions correlated to Overall Satisfaction
 Mean Average = 3.66, Correlation Coefficient Average = 0.88
 Correlation Coefficient - Weak: 0.1, Moderate: 0.3, Strong: 0.5

Group Exercise: Can you identify the areas of opportunity?

Satisfaction Ratings (Mean Scores) by Vice Chancellor Unit, All Respondents

VCU	N of Responses	Overall	Understand	Accessible	Responsive	Collaborative	Resolve	Courteous	Blink	PosDir
Total	292	3.6	3.7	3.6	3.6	3.7	3.7	3.8	3.7	3.7
Academic Staff	201	3.5	3.6	3.6	3.5	3.5	3.5	3.8	3.6	3.6
Administrative Staff	91	3.9	3.9	3.8	3.8	3.9	3.9	4.0	3.7	3.8
Academic Affairs	95	3.6	3.6	3.6	3.5	3.6	3.5	3.8	3.6	3.5
Marine Sciences	30	3.2	3.2	3.3	3.2	3.3	3.4	3.6	3.6	3.3
Health Sciences	76	3.6	3.6	3.6	3.6	3.6	3.6	3.7	3.7	3.7
Chancellors Office	4	3.3	3.0	3.0	3.0	3.3	3.0	3.3	3.3	3.0
Ext & Bus Affrs	43	4.2	4.1	4.2	4.1	4.3	4.2	4.2	3.9	4.2
Student Affairs	18	3.8	3.7	3.5	3.6	3.6	3.7	3.8	3.7	3.6
Res Mgt & Planning	26	3.6	3.7	3.6	3.6	3.7	3.6	3.8	3.4	3.5

Mean Score: ■ Low < 3.0 ■ Marginal >= 3.0 ■ Good > 3.5 ■ Excellent > 3.8

Academic Staff: Academic Affairs, Marine Sciences, Health Sciences

Administrative Staff: External & Business Affairs, Student Affairs, Resource Management & Planning, Chancellor's Unit

Faculty surveyed only every other year (2011, 2013, etc.)

Group Exercise: What should Procurements do?

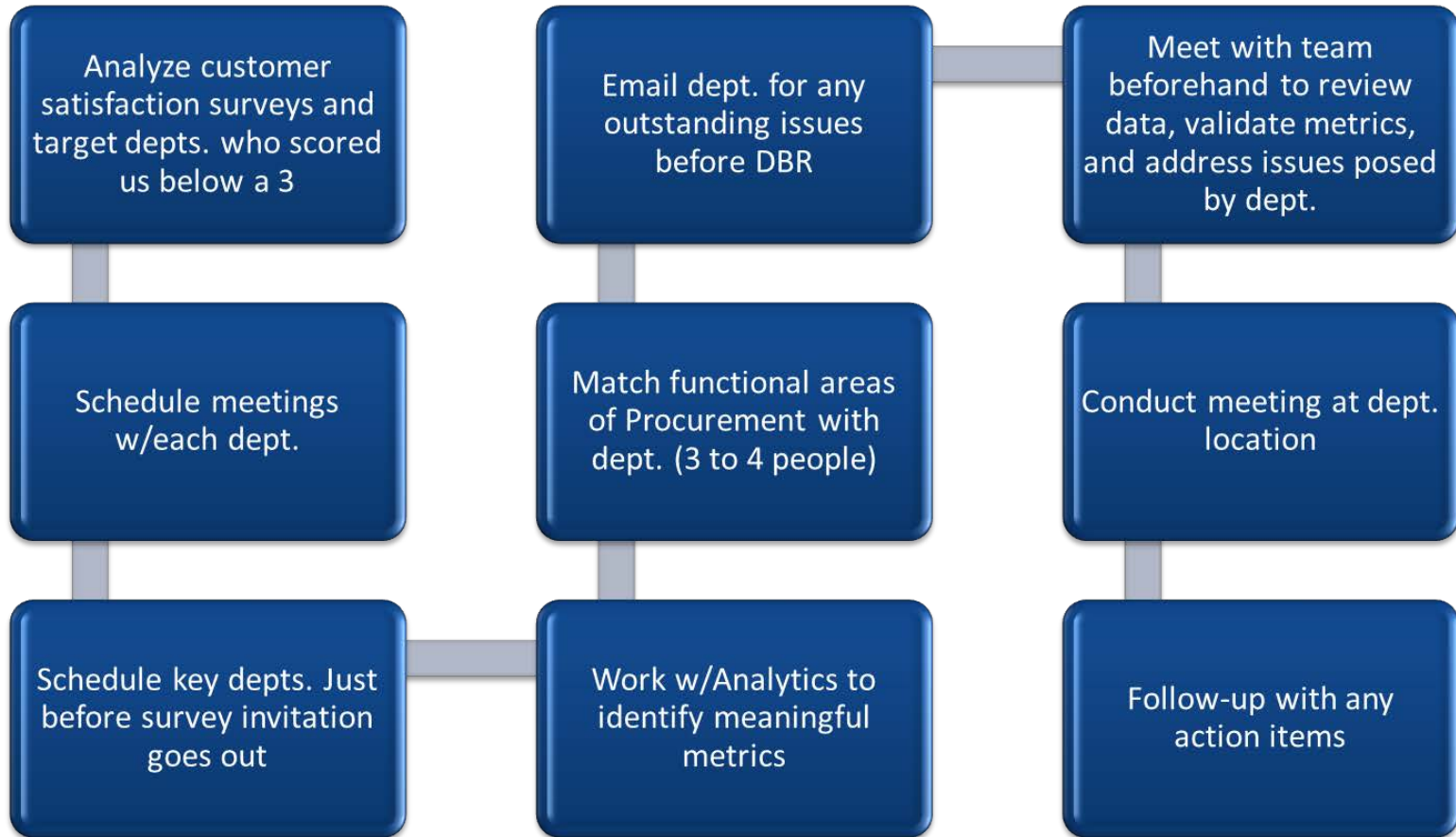
Let's take a few minutes to brainstorm potential risk intervention strategies that Procurements could employ.

Group Exercise: What DID Procurements do?

Implemented Department Based Reviews (DBRs)

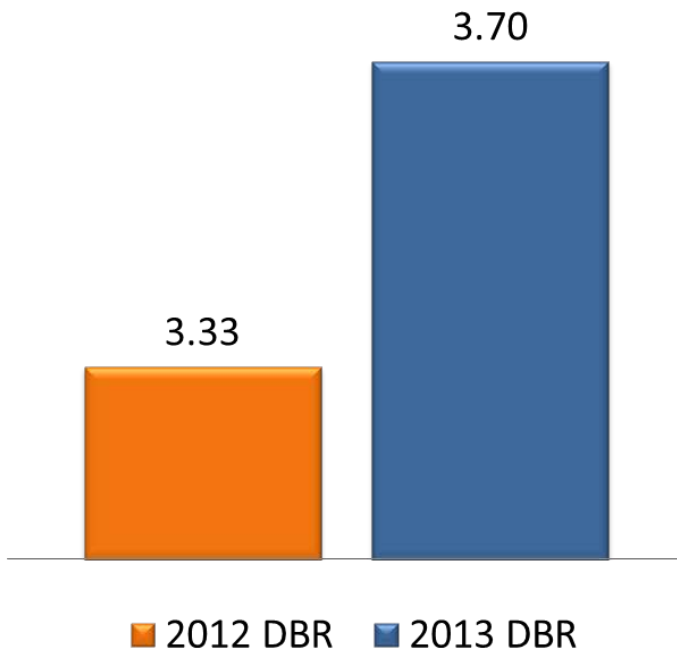
- Based on Customer Satisfaction Survey results, identified areas that gave them low ratings
- Created specialized outreach with customized brochures and individualized meetings

Group Exercise: What DID Procurements do?

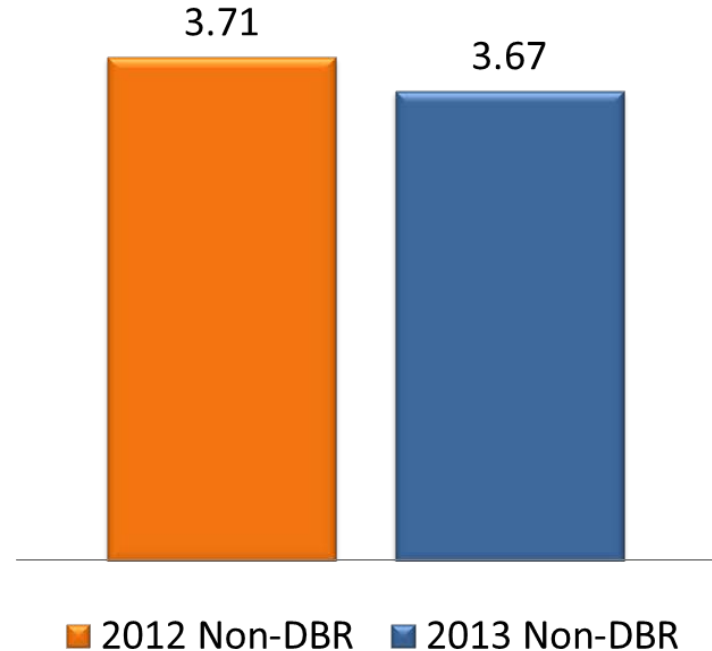


Group Exercise: Let's Analyze the Results!

DBR Departments:
11% average **increase**

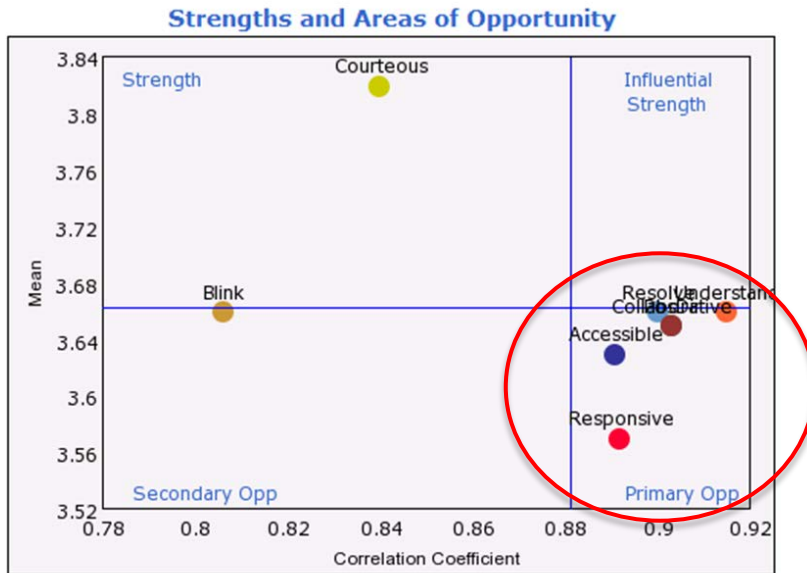


Non-DBR Departments:
1 % average **decrease**



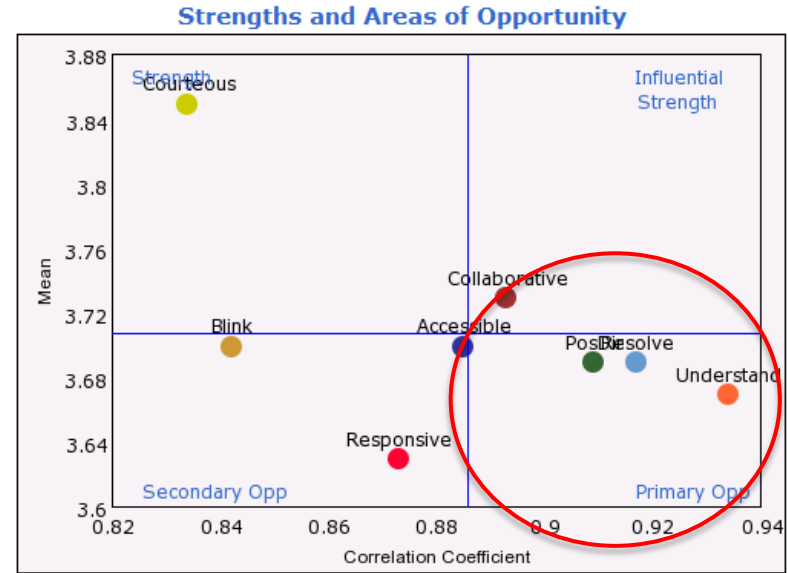
Group Exercise: Let's Analyze the Results!

2012 Results



Scattergraph of all questions correlated to Overall Satisfaction
 Mean Average = 3.66, Correlation Coefficient Average = 0.88
 Correlation Coefficient - Weak: 0.1, Moderate: 0.3, Strong: 0.5

2013 Results



2013 Scattergraph of all questions correlated to Overall Satisfaction
 Mean Average = 3.71, Correlation Coefficient Average = 0.89
 Correlation Coefficient - Weak: 0.1, Moderate: 0.3, Strong: 0.5

Group Exercise: Let's Analyze the Results!

2012 Results

VCU	N of Responses	Overall
Total	292	3.6
Academic Staff	201	3.5
Administrative Staff	91	3.9
Academic Affairs	95	3.6
Marine Sciences	30	3.2
Health Sciences	76	3.6
Chancellors Office	4	3.3
Ext & Bus Affs	43	4.2
Student Affairs	18	3.8
Res Mgt & Planning	26	3.6

2013 Results

VCU	N of Responses	Overall
Total	301	3.7
Academic Staff	225	3.7
Administrative Staff	71	3.7
Faculty	5	3.0
Academic Affairs	96	3.7
Marine Sciences	29	3.6
Health Sciences	100	3.7
Chancellors Office	4	3.5
Ext & Bus Affs	33	3.9
Student Affairs	11	3.5
Res Mgt & Planning	23	3.7

So, how does this all fit into Performance and Risk Management?



Questions?

