

PROCESS IMPROVEMENT & AUTOMATING MONEY EXCHANGE

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2018



May 17,

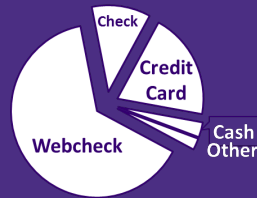
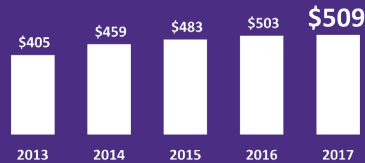
BE BOUNDLESS

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WHOM AND HOW WE SERVE

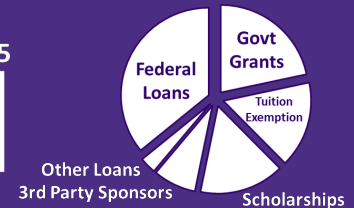
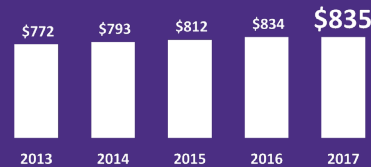
2017 Academic Year

- > Served over 55,000 enrolled students
- > Billed \$984 million in tuition and fees
- > Processed \$509 million in payments



- > Processed \$85 million in 3rd party scholarships/sponsored students

- > Disbursed \$835 million in financial aid and scholarships



- > Since 1990, our staff has been reduced by 54%. We support more than 2500 students per FTE - with 90% satisfaction with In-person services and 79% satisfaction for online services



AUTOMATION AND PROCESS IMPROVEMENT

- > Select process improvement methodology that works for your team
 - LEAN process improvement at UW since 2012 (everyone has the tools to improve their work)
- > Review each process individually
 - Identify time-consuming, cumbersome, or inefficient processes
 - > (hint: ask the people doing the work)
 - Examine processes to pinpoint waste
 - Map processes to uncover opportunities to streamline or automate
 - Gather data – create measures, explore patterns, ask questions
 - Evaluate findings and research options/feasibility – can we take the steps we need to improve this process?
- > Seek approvals and organize a project team to institute change
- > Measure outcomes

AUTOMATION AND PROCESS IMPROVEMENT

If you've done your homework they should *a//*be successful!

Recent examples of successful improvements (LEAN)	Impact
Petty Cash Reimbursements	Eliminated process in favor of online options
Cashiering automation	Established an electronic database for cashier till management
Title IV loan process	Improved systems – reduced errors, improved file transfers from COD, improved frequency of returned fund reporting to COD
Over-award automation	Created a communication system that made process paperless
Departmental Deposit processing	Installed a self-service depository for dept. personnel – reducing SFS and UW work per deposit

GOALS FOR 2018

Student Fiscal Services (SFS)

Vision: Be the global leader in Higher Education student fiscal services operations, excelling in customer service and support

QUALITY • DELIVERY • COST

ENHANCE EXPERIENCE

1. Increase direct deposit refunds from 85.7% to 90%
2. Increase percentage of overawards resolved within 45 days from 63% to 70%

DELIVER VALUE

1. Decrease number of student accounts assessed late fees by 20%
2. Increase number of departments using Invoice Receivable services by 10%

IMPROVE EFFICIENCY

1. Increase % online payments from 85% to 88%
2. Complete 100% of reconciliations by the 26th day of the subsequent month
3. Improve collection rates by increasing debtor response rate from 33% to 40%

SAFETY • MORALE

BUILD CAPACITY

1. Hold 100% of monthly 1-on-1 coaching meetings
2. 100% completion of Lean training per schedule

EMBRACE INNOVATION

Implement at least three ideas per person per month two of which aligns with strategic goals

PAYMENT METHODS

YEAR	WEBCHECK	ONLINE (CREDIT CARD/WIRES)	TOTAL
2012	67.95%	4.85%	72.80%
2013	67.31%	6.36%	73.67%
2014	66.96%	9.60%	76.56%
2015	68.30%	10.51%	78.81%
2016	68.87%	12.51%	81.38%
2017	63.12%	21.89%	85.01%
2018 Goals	N/A	N/A	88.00%

DIRECT DEPOSIT

YEAR	DIRECT DEPOSITS	PAPER CHECKS
2012	85.60%	14.40%
2013	85.44%	14.56%
2014	84.21%	15.79%
2015	83.00%	17.00%
2016	84.62%	15.38%
2017	85.70%	14.30%
2018 Goal	90.00%	10.00%

ADOPTION OF AUTOMATION

- > **Goals for 2018**
 - Increase direct deposit refunds from 85.7% to 90% by December 2018
 - Increase percent of online payments from 85% to 88% by December 2018
- > **Question: how have we gotten this far – how can we move the needle?**



HOW HAVE WE GOTTEN THIS FAR?

- > **Outreach** - More than 100 orientation sessions to students and parents each summer between two UW campuses
- > **Point of Sale** - Cashiers and line monitors encourage students to use online payment methods and answer questions
- > **Department Cooperation** - Partnered with First Year Programs at UW to include our messaging in their programs for newly-admitted students
- > **Customer Conversations** - Addressing customer inquiries by phone or email is an opportunity to promote the value of direct deposit and/or online payment
- > **Management Support** - Allow team to try out different ideas and learn from failures and successes

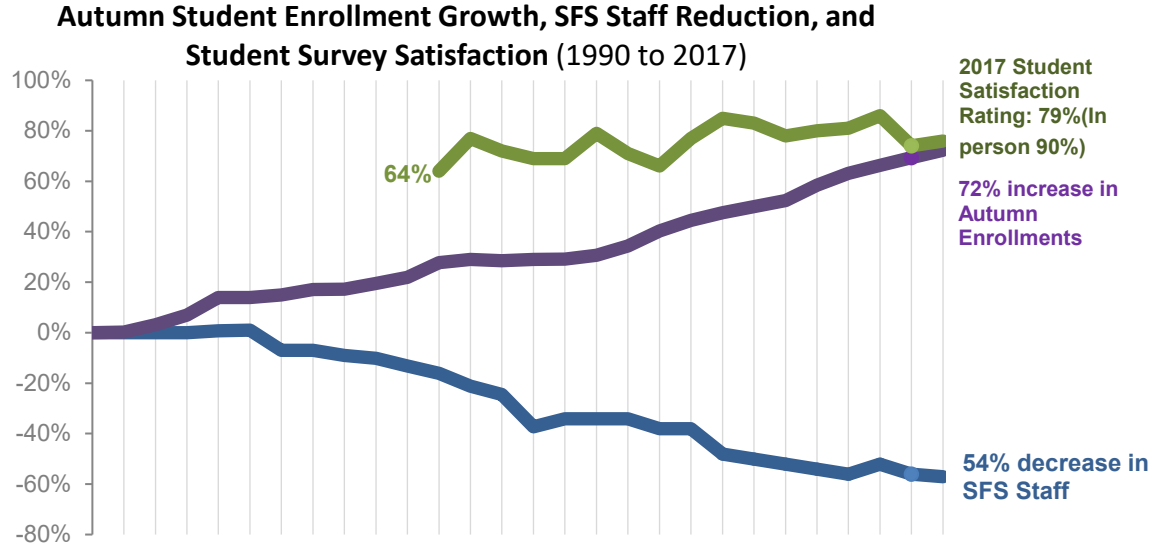
DOES THE NEEDLE NEED MOVING?

- > Annual customer satisfaction survey
- > 90% satisfaction with in-person/phone services
- > 79% satisfaction with our online services



CHALLENGES

- > Student Success
- > Staff Reduction
- > Enrollment Growth
- > Fraud
- > Returned Items





CHALLENGES

- > **Student Success - MOST IMPORTANT:** benefit to the students – faster, more efficient, safer disbursements and payments
- > **Staff Reduction** - (0.5 FTE (Current FTE is 21.5), Student Assistants from 5 to 3)
- > **Enrollment Growth** - 72% increase since 1990/28% since 2007
- > **Fraud** - Persistent threat
- > **Returned Items** - lost checks, long delivery times, old addresses (10.98 % canceled checks)

THE PLAN

- > One word: ★ **Magic** ★
- > Increase outreach – find partnerships in new places to increase number of students contacted



THE PLAN

- > One word:  **Magic** 
- > Increase outreach – find partnerships in new places to increase number of students contacted
- > Expand communications – reach students in new and novel ways, improve existing messaging and reach out to groups of students we had not targeted in the past

SAMPLE MEASURE

Dept. Communication -Monthly Outreach to Dept. Personnel as of 5-1-18

Month - 2018	Dept.	Contacted?	Outcome?
Jan - RS	ICA	Yes	Accepted
Feb - MRS	Admissions	Yes	Accepted
Mar - MM/MRS	ISS / FIUTS	Yes	Accepted
Apr - MM/MRS	Grad School	Yes	Accepted
May - HN/MRS	Study Abroad	Yes	Accepted
Jun - WS/MRS	Bothell		
May - MM/MRS	Tacoma		
Aug- WS/MM	Banks		
Sep- WS	OMAD		
Oct			
Nov			
Dec			

WHO IS INVOLVED?

- > Every staff member
 - Customer Service and Receivables, but also includes “behind-the-scenes” groups – Accounting, Computing
 - Every person is tasked with bringing ideas to the table
 - Every person is heard – participation in planning and execution is required
 - Bi-monthly meetings to create and discuss ideas across units

YOUR HELP, IDEA SHARING AND QUESTIONS

- > Let's talk about your ideas for increasing Direct Deposit and Automated Payments
- > Is this an important process for your school?
- > Questions?

GREETINGS FROM SEATTLE!

