

2021 Administrative and Support Services Customer Satisfaction Survey

Updates January 2023 ; Last Updated 07/31/23

Research and Extension Centers Operations

PRIMARY OPPORTUNITIES			ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Prior Year (###)	Current Year (2020-21)	PO Identified		
0.00	3.70/3.58	Approval time/approval workflow process	<ol style="list-style-type: none"> 1. Identified all processes that go through approval processes: KFS, Aggie Buy, Aggie Expense, WFA, and HR forms. Updated all accounts with 3 delegates in order to have 3 staff as approvers (SWPR, Director, Assoc Director and Assoc Director on recall). 2. Collaborate with various units to develop an overarching workflow chart and provide appropriate links to other units websites for major processes (units involved HR, BOC, SWPR, and others). 3. Working with HR/BOC/SWPR units on WFA to streamline approval workflow for customer requests. 4. Develop Workflow Approval Matrix for all processes and distribute to all REC Directors and REC Business Officers. 	<ol style="list-style-type: none"> 1. Improved approval time for all RECs approval processes: August 2022; ongoing improvements; All documents are being approved within 24 hrs. 2/3. In process; 4. In process; RECs Financial Analyst working with all REC Business Officers on developing this matrix.
0.00	3.58	Clear procedures	<ol style="list-style-type: none"> 1. Monthly Assoc Director/Business Officers meetings to update REC business officers on Leadership updates and address any questions on processes. One on one weekly meetings with new Business Officers of 2 RECs for training and troubleshooting. Started April 2022. 2. Review all current REC procedures in Collaborative tools; update them to current best practices and policies; and upload them to a REC AO dedicated website for internal clients 	<ol style="list-style-type: none"> 1. REC Business Officers are well informed and have a forum to address questions about processes. April 2022, ongoing monthly; ongoing with positive results and feedback; During fiscal close period from end of May to beginning of August, biweekly REC Business Officers meetings have been going on to answer questions and address new/improved. 2. November/December 2022; Delayed to March 2023. SWPR hired a Business Manager/Analyst to work on the REC finances, assist with updating all REC procedures and developing the Workflow approval Matrix for the REC Directors and Business Officers. Financial Analyst Nancy Lu has been working one on one with REC BOs to gather all the information for the matrix and addressing questions.

ADDITIONAL OPPORTUNITIES IDENTIFIED (e.g. verbatim/themed comments, secondary opportunities)	ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Understanding my needs and requirements	<ol style="list-style-type: none"> 1. Monthly meetings with Business Officers are intended to provide our clients with better service and for our team to better understand their needs. 2. CE Specialists and Statewide Directors needs and requirements. 	<ol style="list-style-type: none"> 1. Ongoing; SWPR staff has supported Sierra, Lindcove, Intermountain, West Side and Kearney in processing Aggie Expense Reports, purchasing transactions, and training. Weekly meetings with new REC BOs or anyone that needs additional training. 2. SWPR has hired and trained new personnel. From 4 staff at time of survey, to 8 experienced and trained staff including unit leadership; Operations at the 2nd Street Building Reception area have been revamped with training and development of SOPs. Front Desk area is well managed, served and organized. CE Specialists for which we manage budgets are being supported with dedicated grants and account management personnel as well as purchasing and administrative support. Statewide Programs Directors and Leadership have the admin and purchasing support from our SWPR front desk staff. This is allowing Academics to devote more of their time to their programs and research instead of admin tasks.
Effectively uses website and online documentation	SWPR is a new unit created in 2021, website has not been developed yet. Using Collaborative Tools to disseminate information. Work with IT to train one of our staff members to develop a website. SWPR has weekly team meetings to go over updates on our website as well as brainstorm on additional information and guidance that we can provide to our multiple clients.	November/December 2022; Project Completed with constant updates and uploads of new information and processes. One of our new team members, Sarah Shroyer learned how to create the website and trained other staff. The website now contains information on our unit's mission, staff directory, training videos for staff, and training videos for Advisors/Specialists. It showcases all Statewide programs and RECs, funding opportunities for researchers at the RECs, CE Specialist and AES Faculty Travel Support and Professional Society Travel. On going updated information in the website, with additional training tools and showcasing statewide programs and RECs job postings as well as special funding opportunities.
Clarity of Policy	During the monthly meetings with Business Officers, important resources are shared regarding rate and recharge policy, contracting out 5402 policy, farm temporary labor, equipment purchasing.	Ongoing We will continue to add to the website the updated procedures, as well as links to where to find the necessary information.