Change through Collaboration
(Focus Groups)
Every problem is an opportunity…..

A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty.

Winston Churchill
What if:

• Opportunities come in many different forms

• View all problems as opportunities
  ➢ Talk about what is wrong
  ➢ Obtain the experience of users
  ➢ Think about ways to re-engineer the process
The approach.....

Focus Groups

• Change facilitated through conversation
  • Workflow Focus Group
  • PCard Lunch n Solve Focus Group
Focus Groups

- Invited volunteer membership from cross section of users representing several departments across campus
  - Front line support
  - Approvers
  - Delegates
  - Department Managers
The approach.....

**Focus Groups**

- 1 to 2 meetings per month for up to 6 months to achieve the following objectives:
  - Ensure the current processes are understood;
  - Identify and discuss current related issues for the purpose of developing improvement recommendations, and, track technical issues in process with a target date; and,
The approach.....

Focus Groups

• ensure recommended process is simplified wherever possible, remains Tri-Council compliant, and provides flexibility where necessary
• The work of the focus group will be achieved through working lunch meetings using round table questions and focused discussions
The process.....

Finance/Research Workflow Focus Group

| 1. Lisa Brenn, Pathology                      | 10. Doris Hutchinson, Anthropology  |
| 2. Ruthanne Cameron, Pathology                | 11. Donna Johnston, Rehab. Science  |
| 5. Sasha Eskandarian, Pathology               | 14. Kathy Pfeiffer, HSC Finance     |
| 7. Lisa Greer, Medicine                       | 16. Terri Wetton, AP                |
| 8. George Hamilton, HSC Finance               | 17 Marcy Willis, Surgery            |
| 9. Deidre Henne, AVP (Admin & CFO)            |                                   |
The process… Finance/Research Workflow Focus Group.

- Held 6 meetings (September – November) to achieve a full review of PeopleSoft Finance and Research Post-award workflows
- Identified 20 issues, leading to investigation, discussion and outcome recommendations.
- Linked some issues with 10 unique JIRAs known as the “Workflow Bundle”
- Received sign-off from WFG members on final summary
The process....Finance/Research Workflow Focus Group.

- Tracked the progress of the Workflow Bundle
- Technical issues completed February 27, 2014
- Identified the need for greater communication associated with 12 of the issues
- Communication released January 2015
- Incorporated lessons learned into updated training materials
The results....Finance/Research Workflow Focus Group.

- Implemented technical/configuration fixes
  - Added new research role for Travel & Expense approvals
  - Workflow logic for vouchers, expense reports and requisitions changed to allow approvals to route to a pool consisting of the PI and delegates
  - Vouchers denied by AP no longer re-appear in approver’s worklist
  - Eliminated the risk of a voucher being paid if any lines had been denied
- Communicated workflow FAQ’s on the portal
The process.....

**PCard Lunch n Solve Focus Group**

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<td>2.</td>
<td>Lisa Brenn, Pathology</td>
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<td>Ksenija Kasumovich, Anesthesia</td>
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<td>Connie Carrabs, Chemistry</td>
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<td>Deidre Henne, AVP (Admin &amp; CFO)</td>
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<td>Observers: Paola Morrone, Diana MacPherson, Nancy Gray</td>
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Began meeting on May 28, 2015 – work still ongoing

Ensure current process is understood
  • Total spend for fiscal 2015 - $22m
  • 48,507 transactions
  • 990 cardholders

Identified and discussed issues/challenges with current system
The alternatives…..Pcard Lunch n Solve Focus Group

- Status Quo (current process) with enhancements
- BMO Details On Line (DOL)
- Status Quo + BMO DOL combination
- Journal Entry (previous process)
- Status Quo (with enhancements) + Journal Entry upload
- Non PO Voucher
- SciQuest (proposed implementation (2016/17)
The alternatives.....Pcard Lunch n Solve Focus Group

- Identified criteria and prioritized
  - Must have
  - Nice to have
  - Not possible
- Discussed needs and feasibilities
The must haves.....Pcard Lunch n Solve Focus Group

- Pre-populated chartfield information
- Chartfield validation (combo edits)
- Attachments
- Ease of use
- Timely reconciliation
- Remove validate budget functionality
- Offboarding process
- Training
- Meet compliance requirements
- Approval workflow
Next steps…..Pcard Lunch n Solve Focus Group

- Further investigation of alternatives and feasibility study
- Final decision
- Estimated timelines to complete technical configuration
- Communication/training
- Implementation
Lessons Learned

• Facilitating change through discussion empowers focus group members to become part of the decision making process
• Builds support for decisions made
• Promotes proactive decision making vs reactive
• Enables action across department boundaries
• Promotes learning and adaptation to change
• Fosters ownership of problems
• Reinforces our democratic values
• Builds relationships and improves understanding