

KSG NWSH Design Team
Quick Fix List *Revised*
December 8, 2003

Financial Office

1. Office of Financial Services - Setup standard group e-mail where faculty assistants can e-mail for quick answers. Relevant OFS staff would have access to this e-mail and each day a staff member would have responsibility for checking the e-mails and providing a response in a timely manner. This would also help OFS identify where folks are having problems and help develop the training program they currently offer.
 - a. **Email fix**
 - (1) **Individual questions about specific cases/vouchers/codes, etc.**
 - (2) **OFS would have a pooled email address so anyone could answer**
 - b. In addition to the services Maureen provides, OFS would hold weekly **office hours** where faculty assistants can bring their WebVouchers, journals etc. and have hands on help.
 - c. Also **address phone responses.**
 - d. When faculty assistant assignments are done each semester provide faculty assistant with **financial report** of current faculty support funding allocation, because the money isn't issued until after the assignment has been in place a couple of months.
 - e. **Annotated list of accounts** with project name and description so all people (Faculty, faculty assistants, OFS Staff) know which code to use
 - f. **Confirmation of new grants/account codes** sent to faculty, faculty assistants and OFS staff, etc.
2. OFS staff uniquely assigned to provide authorization on particular accounts: faculty, research, center, program grants, federal grants

Provide current updated OFS assignment list and publicize to Faculty Assistants so it is always available (perhaps on OFS or Fac Asst website)

3. OFS financial training (Harvard financial training, general to all of Harvard, we need KSG oriented training)
 - a. Needs to be beyond basic
 - b. Not detailed
 - c. Too quick

Initiate or at least tell them. Recognize this will be a long term fix.

4. It's hard to tell what is a KSG rule and what is a Harvard rule. KSG has tighter set of rules for e.g. documentation for \$25 expenses vs. Harvard \$75 ceiling for a receipt.
 - a. **Document requirements for KSG vs. Harvard and post them in an accessible place.**
 - b. **Explain why there is a difference.**
5. Inconsistent – Financial Approvers have their own set of standards. Rules and forms change rapidly.
 - a. **Request for consistent, documented set of rules/standards.**
 - b. **Get OFS approvers to work consistently (e.g. what rules, how handle incorrect object codes, etc.). Streamline the paperwork process flow.**
 - c. **Document rules by center since they bypass OFS and go directly to Harvard.**
6. Not only do you have the problem of remembering different passwords. The systems require you to reset the password many times a year and on different schedules; which serves to compound the problem
 - a. **Document and communicate to faculty assistants**
 - b. **Explain why this has to happen**
7. Faculty Snapshots are calculated differently than AWS2 and don't match
 - a. **Report back to Faculty Assistants that this is a rare occurrence**
 - b. **Inform Faculty Assistants what the problem is and that it has been solved**
 - c. **Give procedure what to do if your snapshot does not work.**
8. OFS Should run and send all AWS2 reports to assistants [**Medium Fix**]
 - a. Some faculty assistants want OFS to run and send
 - b. Some reports don't work or run cleanly:
 - c. In some cases, there is a training issue for faculty assistants
 - d. Accountability for faculty assistants to explain discrepancies to the faculty member. This would be true whoever runs it. Explaining report is an OFS responsibility.
 - e. Possibly have faculty ask for their own reports and get them directly from OFS.
 - f. Long term issue: simplify reporting and explaining (what info, who deals with it, etc.)

Investigate entire process and determine if there are any quick fixes that Faculty Assistant and OFS can work out.

Facilities

1. Report on Unavailable Rooms

Set up system with default screen for AVAILABLE rooms. If this is not possible, training/instructions for Faculty Assistants. Also, address ambiguity with Food Event times (1/2 hour either side of event). And double booking occurs occasionally, what can be done?

2. No response from facilities when in need of things (file cabinets, unanswered emails)

An individual employee in Facilities: need to address service to customers.

3. For moves: told to get items out of Faculty offices. We may not support those Faculty anymore. Faculty are either gone or Faculty Assistant no longer working for a faculty member, but the faculty member's obligations (finance processing, materials in office, etc.) still remain.

Need protocol for how to deal with faculty who do not have current faculty assistants to deal with obligations.

Directory

1. Distribute a printed KSG Directory again; The on-line directory assumes that Faculty Assistant is always working on-line, or in own office
 - a. Include all departmental information
 - b. Lotus Notes
 - (1) Directory lacks numbers for front office of center or program
 - (2) Search function/categorization not useful

YES

2. Setup comprehensive page on faculty assistant website and faculty assistant employee manual of who to contact, i.e. changes in the KSG Directory etc.

YES

3. Student Mailbox Numbers: Only available on Town Hall List

Make sure Faculty Assistants get this and have it available.

Equipment & Supplies

1. Copiers
 - a. Antiquated don't work for what needed for

Inventory copiers, assess condition/suitability, prioritize and request action.

2. Setup standard equipment needs in one central location, which would include scanner, typewriter, color printer etc. Perhaps there is an existing space so there won't be any rent charges for new space. Media room for all FA: There is no readily available media room for software and hardware that staff need to accomplish their work but do not have available on their own systems.

Investigate way to have staff-only business center(s) with appropriate equipment.

3. Order forms on Lotus Notes application & service depts. websites (consolidate a directory showing where each dept/order form etc. can be found for quick reference.
 - a. **Centralize and standardize order forms: locate in one place, have standardized process**
 - b. **List of forms**
 - c. **Note on [directory] where to go for the form**
 - d. **Status tracking for form processing**
 - e. **Consolidate database as a quick reference for FA's [forms are an example, but could include other "who to contact" and how]**

IT

Service Issues

1. When things are completed we often don't hear back from them. Not service oriented: Ask for help and told "too busy"
2. IT seems to lack an organized and transparent system to provide support to the end users.
3. It's unclear how software and hardware vendors become official. It seems to be a hidden process without input of the FAs who have to work the stuff.
4. IT do not communicate to faculty assistants what IT considers to be priorities or where a service call falls into that system.
5. Nor does IT communicate when a response to a service call will actually happen.
6. No staff on IT committee: There is an IT committee which is involved with setting some policies (we suppose because no one talks about it); but there are no staff or real end users on the committee.

Set up IT-Faculty Assistant task force to address service issues.

Other IT Issues

7. Listing of colleagues that excel in certain applications

Peer support for application questions

8. Departments sometimes do not have equipment configurations adequate for some applications.
9. Course pages: Student Names Alphabetized Students names consistently alphabetized in all forms (registrar and course pages)

Should be consistently alphabetized by last name.

10. IT training for all faculty. No real computer training for Faculty. This forces FAs into a training role for faculty adjusting to systems here.

HR

1. Secure areas for confidential files

Inventory Faculty Assistants who don't have secure storage and remedy

2. Made to wait for planned meetings when you arrive at the HR office

YES

3. Can't earn overtime [unless approved], only comp time; staff are "encouraged" to keep track of it

Communicate KSG policy and labor law on working overtime

4. Items taken out of personnel folders

Clarify HR policy/procedure (e.g. medical records); if have any individual concern, contact HR for review of own file with HR.

4. Leave Faculty Assistant the unwanted responsibility of telling faculty time limits. Faculty Assistants should not work through lunch or before/after work in order to get work done – work is often more than a can be done in a 35 hour week.

Offer HR/Maureen assistance in talking with faculty; training in how to talk with faculty.

5. Many times they involve a group of forms that each only have a piece of information necessary for the processing of paperwork, rather than one form that contains all the necessary information.

Look at it and see if there are ways to simplify it or at least document how to do it (e.g. location of forms, checklist of what to do)

6. CA's/Timesheet: CAs (course assistants) and TF (teaching fellows) are hired and selected through Kathleen Fox's office. But the CAs need to have the FAs signature's to get paid. The FAs are not the online approvers for the CAs. So the CAs process their hours online, print out the timesheet, bring it the FAs for signature and then take it over to a drop box. This is all by a 9 AM on Friday deadline for that week. Some of these are from other parts of the school and they have to make special trips just to handle the time sheet.

Investigate whether can be streamlined.

7. Repetitive Stress Injury (RSI) is how changes to work environments are made. You have to be in physical pain or discomfort before your ergonomic concerns are addressed. There is no immediate help.

Educate and offer support/backup.

8. Petition for grade change as part of performance evaluation; parts of reclassification are redundant of the performance evaluation.

Add checkbox to performance evaluation form/process to indicate or alert HR that employee wants reclassification to be considered. Also, communicate that can initiate reclassification anytime; do not need to wait for performance evaluation

9. Mentoring program – Career Development and job advancement.

Look into setting up a program.

10. Need concise listing of chain of command in departments for PeopleSoft **YES**

11. Peoplesoft: Faculty are asked to sign for everything. Why should one person vouch for all work? Infantilizes experience of Faculty Assistants Faculty not around to sign time sheets PeopleSoft “supposed” to cut down on paper, but doesn’t.

Look into signing authority or need for signing. Document clear procedure and rules.

Training and Job Skills

1. Have training done by folks who use the systems, not just folks who design the trainings, i.e. from Faculty Assistant point of view.

Communicate Faculty Assistants can get help from Maureen if they have questions on using systems.

2. Schedule one-on-one help with reclassification process. Buzz words to look for etc.

YES

3. Find out what budget has been allocated for faculty assistant training and if there is additional funding available through Human Resources. Similar to the front page training that was offered last year to staff and faculty assistants. Look at resources the faculty may have to offer and see if they would be willing to hold workshops.

Investigate budget and follow up with Faculty Assistants what is available and how to use the resources.

4. Have peer learning opportunities

Communicate current groups that meet or network; ask for what additional peer groups would be helpful and then set them up.

5. Need small groups and hands on classes based on skill level for computer training (both CTD and KSG classes are too big and too much difference in skill levels).

Work out a schedule with IT; consider smaller classes set up by skill level. Find way to get Faculty Assistant input into training curriculum and class design.

Faculty Assistant Position

1. Include staff in picture book.

Get an answer if it is possible.

2. Faculty percent of time – i.e. When they receive 17% of time, even though they know how many hours they receive they don't understand how long tasks take.

Develop approximate times and list for faculty to improve their understanding how long things take to do.

3. Setup Standard Policies and Procedures for transferring over work when faculty assignments change, faculty are on leave and faculty who are no longer at the School. This may include what to do with files left behind, voicemail etc.
 - a. There is no clear cut off from when you loose responsibility for one faculty and gain it for another.
 - b. Still getting mail for a Faculty member I stopped supporting over a year ago
 - c. Can't remove email accounts for gone Faculty.

Set up clear procedure/protocol.

4. Include faculty assistant job description in faculty member's orientation packet. Do and don'ts list of faculty assistant's responsibilities. Any other relevant information related to the faculty assistant i.e. how many hours of work they receive. Review in meeting with Faculty Assistant and Group Leader.

YES

5. Improve the process to move Faculty Assistants to new space. Moves are difficult on us. Bad management – just telling people they are moving in an improper/un-respectful way; Never have a choice in it (can go from being in own office to sharing a space)
 - a. **Advance notice**
 - b. **Manage the move process in an organized way with proper lead times (protocol)**