

## **Excellence Award Winners for 2015**

- **Dora Brown**, Assistant Director, Office of Sponsored Research
- **Jennifer Soyoun Shim**, Process Improvement Manager, FMS
- **Business Affairs HR Team**
  - Somjai Ayapitak
  - Jennifer Mallon Brown
  - Dawn M. Freeman
  - Jennifer L. Freitas
  - Margie Mene

### **Dora M. Brown**, Assistant Director, Office of Sponsored Research

This past year, Dora has made numerous contributions towards multiple fiscal year initiatives and advancing our operations.

Dora was a key contributor on two of Business Affairs' principal initiatives. As an inaugural member of the high potential group under the talent initiative, she embraced this opportunity and deployed to FMS to assist with the Evolving Financial Reporting initiative. She played a key role on that initiative and contributed towards meeting its objectives while maintaining her OSR responsibilities. She was offered several opportunities to delegate some of her OSR duties, but it was important to her to finish what she promised. Her FMS managers were so impressed that they asked if Dora would consider extending her assignment for an additional six months, which she graciously agreed to do. And she agreed to this while taking on the Oracle upgrade project.

As noted above, in addition the talent initiative, Dora was a key member of the ERF team, leading many parts of the CER component and working with campus and central clients to ensure success. She was instrumental in making sure the RM3 1:1 conversion was properly understood and that report adoption was successful. It is not a stretch to say that Dora was a key reason that the EFR initiative met its goals for the year.

In addition to the business affairs initiatives, Dora has been a key member of the Oracle Governance team where she bridges four operational groups...OSR, RFCS, AS and FMS. She offers a unique insight since she understands all four business operations and offers counsel on how the technology and business processes intersect.

Dora sets the example of what we desire in Business Affairs. She is an unselfish, extremely talented employee whose primary goal is to better our way of doing business.

**Jennifer Soyoun Shim**, Process Improvement Manager, Financial Management Services - Consulting and Support

The number two Business Affairs strategic goal is to “Transform administrative processes, systems and infrastructure throughout the University so that people can spend more time on value-added activities.”

As part of the 2014 management changes that took place in the Stanford Management Company, the Gift Securities group fell under new leadership. The new manager felt the group needed an overhaul, but was unclear where to start. Jennifer Shim and her colleague Michael Torr performed a current state assessment to identify areas for improvement, and then Jennifer was responsible for designing and implementing an improved future state. To do so, she acted as a one-person consulting team, taking on the roles of project manager and business analyst in addition to her normal process improvement role. Partnering with the Gift Securities team and SMC IT, she accomplished the following:

- Completed future state design and solutions implementation through leading and facilitating brainstorming sessions, identification of key pain points and areas for improvement and then the prioritization and feasibility of the ideas.
- She led and facilitated requirements gathering and system enhancement development testing/debrief sessions with SMC’s IT director leading the team through the design, implementation, and testing phases of system enhancements. She collected baseline data and assisted in establishing key metrics.
- Assisted in reorganization of SMC’s Gift Securities group.
- Successfully assisted in the transition of the gift securities reconciliation process from SMC to Investment Accounting. Helped all of the parties involved in the process (Gift Securities, Investment Accounting, Fund Accounting, and Development Services, SMC IT) to start discussion on how the reconciliation process can be further improved.

Jennifer’s work clearly helped transform administrative processes and created capacity for SMC to focus on more value-added activities. She completely owned this work from start to finish and worked independently with SMC to deliver the following impressive results:

- Overall cycle times (date of gift to approval) decreased by 45% (from 15.2 days to 8.4 days) in 2014 compared to 2013, despite the fact that the volume of work increased by 36% (from 1752 gifts to 2378 gifts) and the # of team members decreased by 33% (from 4.5 team members to 3 team members).
- Quality of work (error rate) continued to be below 1%

- Reduced number of steps for the following key processes:
  - Gift notice, Gift memo and GRASP data entry process: from 58 steps to 33 steps
  - Gift approval: from 26 steps to 11 steps
  - Dreyfus morning report process: from 85 steps to 40 steps
  - Daily gift index (DGI) report process: from 50 steps to 42 steps
- Increased % of gift notices received through Giving 2 Stanford (G2S) website: from 4% (Aug – Dec 2013) to 10% (Aug – Dec 2014)

Jennifer's work on improving the Stanford Management Company gift securities and charitable trust groups has established trust and credibility with that organization and has paved the way for future work. Because of her strong performance on this project (and her previous strong work on another Office of Development project), she was recently requested by SMC and OOD to work on improving the end to end gift securities process across the University.

### **The Business Affairs HR Team**

Last year, the University embarked on the significant initiative of updating the university-wide staff job classification system for all 11,000 Stanford staff members. The BAHR team took on the monumental task of reviewing, analyzing, coordinating, and implementing this new classification for all 785 Business Affairs positions. This initiative aligns to the Business Affairs strategic goal to “create an environment that attracts, retains, and develops world class staff”, for which a robust job classification system is paramount. Having standard job descriptions and classifications enables consistency and transparency across the University, which is an imperative foundation for employee career growth and development. Furthermore, it ensures we have competitive market classification ranges to attract and retain a workforce rich in talent.

Implementing this new job classification system required substantial collaboration, time, and energy on behalf of the BAHR team to ensure a successful outcome. The following is just a sampling of the work and effort that led to the BAHR team’s achievement of this goal:

- Collaborated extensively over the course of 20+ sessions with University HR Compensation to discuss and analyze each of the numerous job families and job descriptions to reach consensus on the description and its use throughout the University.
- Partnered with all management levels across Business Affairs to correctly map, and sometimes remap, each of the 785 roles in Business Affairs.
- Acted as an advocate for the unique needs of Business Affairs, creating new job families or series as needed, despite being faced with resistance.

- Developed training materials and conducted over a dozen training sessions to ensure each manager was well-informed and ready for implementation with their staff.
- Coordinated the communication plan for all aspects of the initiative within Business Affairs, from the initial communication to the organization to the individual letters given to each employee with their new classifications, and everything in-between.
- Ensured all job classification updates to Fair Labor Standard Act (FLSA) exemption status were meticulously handled and communicated. Provided on-going coaching and support throughout these changes.
- Designed and delivered multiple reports to calibrate job classification assignments and salary bands with Business Affairs senior leaders.
- Managed the data integrity and data execution components to ensure the new job codes were accurately created and assigned to both existing positions as well as all open requisitions.

This Job Classification Initiative was successfully implemented through the exceptional efforts of each member of the BAHR team, remarkably while still delivering on their day-to-day commitments and annual performance goals in support of the Business Affairs organization.

### **Project Team Members**

Somjai Ayapitak, HR Coordinator, IT Services and Shared Services

Jennifer Mallon Brown, HR Senior Business Partner, AS, ISO, and RFCS

Dawn M. Freeman, HR Associate Director, FMS and OSR

Jennifer L. Freitas, HR Manager, Risk Management and BAHR Program Manager

Margie Mene, HR Coordinator, AS