

# Guiding Principle 5: Efficient use of University resources

## Workflow Optimization Efforts

- ONE Penn State 2025
  - Guiding principle 5: Achieve the highest level of efficiency of University resources
    - In 2025, we will leverage digital resources and align faculty, academic, and administrative resources to strengthen learning, research, and student support opportunities, thereby achieving greater institutional efficiency to address equity of, access to, and affordability of a high-quality Penn State education.
  - Workstream optimization

# Workstream Optimization

- Workstream optimization subgroup
  - Stephanie Flanagan (OHR; SIMBA Organizational Change Management Lead)
  - Richard Heininger (University Budget Office)
  - Jeff Smith (Outreach & World Campus)
- Subgroup initial efforts focused on:
  - Reviewing the breadth of opportunities to gain efficiencies in the academic enterprise and administrative functions, particularly those that leverage the recent implementation of university-wide systems
  - Assisting in spreading awareness of ability to further leverage
  - Calculate/summarize efficiency gains for One Penn State 2025 reporting

# Selected Early Areas of Review & Focus

- LionPATH Forms (tied to GP1 as well)
- Electronic signatures
- World Campus Advising use of AI
- Integration platform for IT systems
- Leverage SIMBA Reporting
- Sailpoint
- Box transition
- Workday Recruiting
- Procurement

# LionPATH Forms

- Not just a web form
- Captures data historically captured on a paper form; routes workflow for approval and processes it into the system (LionPATH)
  - To date approximately 70 forms requested
  - 3 forms are in production
  - Measuring efficiency; developing template for savings
- Contact: LionPATH Development/Maintenance Organization (LDMO); Misty Patcyk, Tim Radio

# LionPATH Forms – Top Form Priorities

## Top Undergrad Forms Requests

- Grade Forgiveness
- Withdrawal
- Leave of Absence
- Prerequisite Override
- Special Course Repeat Request
- Alternative Commencement Site
- UGRD Reenrollment for Graduation
- Reenrollment

## Top Graduate Forms Requests

- Doctoral Examination Results
- Graduate Student Committee Policies and Procedures Committee Appointment
- Graduate Semester Report
- Thesis/Dissertation Submission Review
- Grade Changes After 12 week limitation
- Request for Letter of Certification
- Request for UGRD to take GRAD class
- Exception/Extension/Approvals
- Report on Doctoral Qualifying Examination
- Doctoral Examination Request

# LionPATH Forms

## Forms/Workflow Project

- Requests to gather metrics/analysis for each form implemented, Data for 2 forms so far
  - 2025 Committees, Penn State IT
- Estimated University Savings so far: **87.09 Hours, \$5748.48**

| Savings Estimates for<br>Doctoral Exam Request Form<br>396 from 10/22-2/2 | *Prior State<br>Per Form | *Prior State<br>Per Year | Current State<br>Per Form | Projected State<br>Per Year | Estimated<br>Savings<br>Per Year | Current Est.<br>Savings since<br>Go-Live |
|---|--------------------------|--------------------------|---------------------------|-----------------------------|----------------------------------|--|
| Time Spent Per Form   | 13.05<br>minutes         | 326.25<br>hours          | 1.1 minutes               | 27.5 hours                  | 298.75<br>hours                  | 78.87 hours                              |
| Cost for Processing Per Form  | \$14.74                  | \$22,110                 | \$0.79                    | \$1,185                     | \$20,925                         | \$5,524.20                               |

\*~125 forms/month, ~1500 forms/year

| Savings Estimates for<br>Letter of Certification Form<br>36 from 11/12-2/2 | *Prior State<br>Per Form | *Prior State<br>Per Year | Current State<br>Per Form | Projected State<br>Per Year | Estimated<br>Savings<br>Per Year | Current Est.<br>Savings since<br>Go-Live |
|--|--------------------------|--------------------------|---------------------------|-----------------------------|----------------------------------|--|
| Time Spent Per Form – Staff  | 14.23 min                | 42.69 hours              | .53 min                   | 1.59 hours                  | 41.1 hours                       | 8.22 hours                               |
| Time Spent Per Form – Student  | 4.28 min                 | 12.84 hours              | 2.17 min                  | 6.51 hours                  | 6.33 hours                       | 1.266 hours                              |
| Cost for Processing Per Form   | \$6.62                   | \$1,192.14               | \$0.39                    | \$70.89                     | \$1,121.25                       | \$224.28                                 |

\*~60 forms/semester, ~180 forms/year



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# Example Efficiency Gained Template

| Summary Forms Investment Analysis Template |   |             |             |            |            |            |
|--|---|-------------|-------------|------------|------------|------------|
|  |   | Year 1      | Year 2      | Year 3     | Year 4     | Year 5     |
| <b>Investment</b>                          | Vendor Implementation Contract Expense  | (\$200,000) | \$0         | \$0        | \$0        | \$0        |
|  | Vendor Software Licensing / Maintenance | (\$50,000)  | (\$51,250)  | (\$52,531) | (\$53,845) | (\$55,191) |
|  | PSU Staff Implementation/Training       | (\$15,070)  | \$0         | \$0        | \$0        | \$0        |
|  | PSU Staff Maintenance                   | \$0         | (\$20,000)  | (\$20,500) | (\$21,013) | (\$21,538) |
|  | Subtotal General Implementation         | (\$265,070) | (\$71,250)  | (\$73,031) | (\$74,857) | (\$76,728) |
|  | Form 1 Implementation/ Training         | (\$16,012)  | \$0         | \$0        | \$0        | \$0        |
|  | Form 2 Implementation / Training        | (\$11,020)  | \$0         | \$0        | \$0        | \$0        |
|  | Form 3                                  | (\$12,000)  | \$0         | \$0        | \$0        | \$0        |
|  | Form 4                                  | (\$11,000)  | \$0         | \$0        | \$0        | \$0        |
|  | Form 5                                  |             | (\$12,000)  | \$0        | \$0        | \$0        |
|  | Form 6                                  |             | (\$12,000)  | \$0        | \$0        | \$0        |
|  | Form 7                                  |             | (\$12,000)  | \$0        | \$0        | \$0        |
|  | Form 8                                  |             | (\$12,000)  | \$0        | \$0        | \$0        |
|  | Form 9                                  |             | (\$12,000)  | \$0        | \$0        | \$0        |
|  | Subtotal                                | (\$50,032)  | (\$60,000)  | \$0        | \$0        | \$0        |
|  | Total Investment Costs                  | (\$315,102) | (\$131,250) | (\$73,031) | (\$74,857) | (\$76,728) |
| <b>Efficiency Gains</b>                    | Form 1 Efficiency Gain                  | \$34,143    | \$35,167    | \$36,222   | \$37,309   | \$38,428   |
|  | Form 2 Efficiency Gain                  | \$11,146    | \$11,480    | \$11,824   | \$12,179   | \$12,544   |
|  | Form 3                                  | \$23,000    | \$23,575    | \$24,164   | \$24,768   | \$25,388   |
|  | Form 4                                  | \$8,000     | \$8,200     | \$8,405    | \$8,615    | \$8,831    |
|  | Form 5                                  | \$0         | \$17,600    | \$18,040   | \$18,491   | \$18,953   |
|  | Form 6                                  | \$0         | \$21,000    | \$21,525   | \$22,063   | \$22,615   |
|  | Form 7                                  | \$0         | \$15,000    | \$15,375   | \$15,759   | \$16,153   |
|  | Form 8                                  | \$0         | \$32,000    | \$32,800   | \$33,620   | \$34,461   |
|  | Form 9                                  | \$0         | \$17,000    | \$17,425   | \$17,861   | \$18,307   |
|  | Subtotal Efficiency Gain                | \$76,288    | \$181,022   | \$185,781  | \$190,666  | \$195,680  |
| <b>Annual Net Gain/(Loss)</b>              |   | (\$238,813) | \$49,772    | \$112,750  | \$115,809  | \$118,951  |
| <b>Cumulative Net Gain/(Loss)</b>          |   | (\$238,813) | (\$189,041) | (\$76,291) | \$39,517   | \$158,468  |

# e-Signature & Power Platform

Two areas of focus

## 1. External process flow

- Requires Legal signature required
- Utilizing Adobe Sign
- 12 university partners on board



## 2. Internal

- Does not require legal signature
- Internal process flow improvement/process flow
- Utilizing Power Platform

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# World Campus Advising - AI

- Initiated to address adviser scale in terms of workload issues in serving the current (and growing) volume of students attending Penn State World Campus (PSUWC) in pursuit of a World Campus credential.
- Goals for the project include quicker responses to students' inquiries and automating manual processes to decrease advisers' workload.
  - Re-enrollment
  - Change of Major
  - Change of Campus
  - Deferment
- Results thus far
  - What once took up to 5 days now can be done in under 1 day 
  - Unexpected inefficiencies; AI User Interface requires additional functionality in order to leverage these time savings 
  - Stay tuned

➤ Questions?

➤ Have an idea to share? Share it with us!