Administrative Workload Survey Overview

What is an administrative workload survey?

An administrative workload survey is a method of calculating the volume and distribution of work performed by administrative support staff across the institution. The survey asks participants to evaluate how much of their time is spent on various functional areas and specific tasks, providing a picture of which activities are the most time-consuming and thus could be good targets for streamlining or centralizing.

Why should an administrative workload survey be part of my shared services planning process?

The workload survey is an essential step in the shared services planning process. Without it, it is very difficult for leadership to gather an accurate picture of opportunities for increased efficiency or the right amount of staff to deploy in a shared services model.

First, the survey provides data on tasks that could benefit from process redesign, economies of scale, or specialization via shared services. To determine which of these solutions might be most appropriate for any given task, administrative workload surveys should be supplemented with qualitative information collected in town hall meetings, focus groups, or individual interviews with staff. These are important opportunities to solicit staff perspectives on their workload, as well as pain points and suggestions for improvement.

Second, the survey is necessary to determine the right number of staff that should be deployed in a shared services organization. Given the distributed nature of many administrative tasks, it is necessary to take a holistic look to calculate the amount of staff time and effort deployed across the institution.

How do I deploy an administrative workload survey?

An administrative workload survey can be developed and administered in-house. Follow the steps in this guide to create and distribute the survey. An accompanying communications plan should be deployed to ensure staff members understand the survey's purpose and how to fill it out.

Six steps to implementing an administrative workload survey:

1. Compile a list of all administrative activities performed in units

2. Check the list with unit leaders and revise

3. Design a workload analysis survey based on activities list

4. Test the survey with a subset of potential customers and revise

5. Distribute the survey

6. Analyze results

Source: EAB research and analysis.

Administrative Workload Survey Process

Step 1: Create a list of all administrative activities performed by distributed support staff

Begin the shared services planning process by taking stock of what administrative activities are currently completed by administrative support staff in distributed departments and divisions that will be. This forms the foundation of the administrative service catalogue.

Administrative leaders should create a list of all activities performed by support staff in distributed units. Begin by listing general functional areas such as HR or Finance. Then, within each functional area, drill down into the specific support activities performed in the units.

Sample Service Catalogue

I. Human Resources
  A. Hiring support
      • Position description creation/editing
      • Candidate sourcing
      • Posting of job advertisement to internal and external platforms
      • Coordination of interviews
      • Processing of offer packages
      • W-9 processing
      • Onboarding

Step 2: Check the list with unit leaders and revise

After central administrators have compiled a draft of the comprehensive service catalogue, customer unit leaders should be consulted to review the list and make revisions. This step is needed to capture additional tasks that central staff may not be aware of when compiling the initial list.

Step 3: Design the workload analysis survey

Create the workload analysis survey using an online survey tool. The survey should ask administrative staff to allocate their time across the activity catalog compiled in steps 1 and 2, above. The survey will ultimately provide administrative leaders with a picture of which tasks make the biggest demands on staff capacity.

In the survey, ask staff to break down their time first by category (e.g., HR, research administration) and then by sub-activity (e.g., grant processing). Time can be gathered as a percentage of a workweek, or total number of hours.

Consider the following when designing the survey:

- The survey should be customizable to each staff member, so that finance support staff are not asked to answer questions about HR activities. This can be accomplished by asking staff to complete a preliminary question that filters the rest of the survey to their responsibility areas.

- The survey should include some qualitative, free-response questions that allow employees to suggest improvements or identify pain points in current processes.

Sample Workload Survey	
HR Tasks Please estimate what percentage of your time you spend on each of the following work areas. Numbers should sum to 100.	
Job posting creation and editing	10
New hire documentation	15
New hire onboarding	20
Time and leave tracking	10
Employment status changes	10
Meetings and collaboration	25

Administrative Workload Survey Process (cont.)

Step 4: Test the survey with a subset of potential customers

Once the survey has been designed, test it with a small subset of unit-based staff. Ask for feedback regarding the ease of understanding the instructions and questions, as well as the format. Feedback can be collected through a questionnaire or focus-group session. Either way, it is critical to solicit this feedback to decrease frustrations and questions during the actual survey administration.

Step 5: Distribute the survey

Effective administrative workload surveys are accompanied by a thoughtful communication plan to introduce staff to the survey and its intended purpose. This not only improves the quality of data collected but also serves as a valuable opportunity to built trust and ensure transparency about shared services as a whole.

The survey communications plan should include:

- An introductory training session explaining the purpose of the survey and how to complete it

    Recommendations:

    Walk the audience through a sample survey, showing examples of each type of question

    Record the presentation for staff who miss the session or want to reference it later

    Create a how-to guide to accompany the survey

    Provide an estimate of how long the survey will take to complete (ideally less than an hour)

    Emphasize that the point of the survey is not to target jobs for elimination, but to determine which tasks would benefit the most from consolidation

- Clear deadlines about when the survey will be opened, who must complete it, and the deadline for completion

- A point-person whom staff can contact with questions or concerns

- Venues for soliciting feedback about the survey and the data that is collected (e.g., townhall meetings, focus groups, or a dedicated email inbox for staff to submit questions and comments)

Source: EAB research and analysis.

Administrative Workload Survey Process (cont.)

Step 6: Analyze the results of the survey to determine appropriate staffing levels for potential shared services offerings

Once the survey is closed and supervisors have had a chance to review and confirm the inputs from their teams, the data can be analyzed. The goal is to estimate staffing needs for delivering administrative activities via shared services. The following analyses will help leaders use the data from the survey to inform the end-state shared services model:

- The total amount of staff time devoted to a specific task, particularly those that are frequently consolidated into shared services

- Differences in the total amount of time allotted to the same task between units, which can indicate understaffing or gaps in training

- Segments of staff performing each task (e.g., specialists versus generalists) and any correlation with time spent on the task or overall quality of work

- Processes frequently noted as frustrating or in need of streamlining

Qualitative responses collected in the survey can also be helpful in determining which activities produce a significant amount of frustration and therefore may serve as attractive entry points into winning over shared services champions via consolidation.

Source: EAB research and analysis.