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Foundations of Modern Administrative Transformation

Identifying and Scaling Opportunities for Back-office Function Improvement

The Strategic Case for Administrative Transformation

Experts Continue to Identify Significant Opportunities...

10-30% Reduction in back-office FTE work hours through implementation of shared service redesign (est avg)

55% Staff time spent on automatable activities (est)

20-40% Estimated reduction in routine hours of knowledge-work due to Generative AI use

...Leading to Major Investments in Administrative Redesign

"Under our old model, business services were perceived as low-value and non-core. With shared services, administrative staff have been able to reinvent themselves as high-value service providers."

— *Shared Services Director, Public Research University*

"Higher Education is at a point where we have to change. We can't keep doing things the way we've always done them... we need to be more efficient, more effective, and more focused on our core mission."

— *Vice-Chancellor, Keele University*

"We took the time to get our model right, to focus on our customers, and to simplify and standardize our processes. You can't rush shared services if you want it to last."

— *Shared Services Director, Public Research University*

Source: McKinsey; McKinsey Global Institute; McKinsey & Company; Gartner; EAB interviews and analysis.

From Financial Crisis to Strategic Transformation

'University of Alberta for Tomorrow' Positions Institution for the Future

PROBLEM ▶ SOLUTION ▶ OUTCOMES ▶

PROBLEM

CA$222M

Reduction in provincial funding (**33%** of total), which equaled **20%** of general operating budget

CA$135M

Needed net budget reduction after accounting for tuition fee increases

SOLUTION

Service Excellence Transformation
Shifted central services (e.g., HR, finance, IT, procurement) into shared units to achieve economies of scale

Academic Restructuring
Consolidated 13 colleges into three, streamlining leadership and support infrastructure to reduce duplication

Executive Reorganization
Reduced number of vice-presidents, merging roles, decreasing overall team size, and recalibrating portfolios

OUTCOMES

1,000

Role eliminations, with 400 completed in year 1

CA$20M

Savings from restructuring the provost's portfolio

CA$900K

Annual salary savings from executive team restructuring

> "…it was time to bring the conversation about post-secondary modernization out of the margins and into the mainstream. Why not **make the changes that some critics had been saying were long overdue** for all universities?"
>
> *Bill Flanagan, President*

Source: Times Higher Education, Restructuring a university, part one and part two; University of Alberta, About U of A for Tomorrow and U of A for Tomorrow; EAB interviews and analysis.

Admin Redesign Goals

What Are We Trying to Achieve (and How Will We Know We Achieved It)?

SECTION 1

Unpacking the Four Goals of Admin Innovation

Goal	Description	Frequency	Parallel Non-Redesign Investment	Important Insight
Cost Savings	Principled and sustainable reduction of administrative spending to preserve resources		Position Control and Vacancy Review	Labor reductions are the primary source for redesign cost savings.
Labor Redeployments	Transition staff from transactional tasks to higher value work for economies for scale		Upskilling Programs	Growing labor costs and demographic decline will make it harder to find talent in future.
Service Improvements	Elevated service efficiency and effectiveness for customers and providers		Service Level Agreements	Perform cost-benefit analysis (CBA) on every desired improvement to allow for prioritization.
Risk Reductions	Identification and management of threats and preservation of business continuity		Embedded Enterprise Risk Management	Check compliance and regulatory requirements with legal, IT, and HR representatives.

Source: EAB, A how-to guide for kickstarting administrative efficiency initiatives on campus; EAB interviews and analysis.

Transformation Quantified

Universal Metrics for Administrative Transformation

- Number of staff FTE involved
- Change in operating revenue
- Change in operating cost
- Percentage of operation expenses by unit
- Change in number of transactions per activity
- Number of hours spent on strategic initiatives

Additional metrics and selection criteria found in EAB's Core Performance Metrics research

Cost Savings

- Reduction in total payroll expense
- Average vacancy period for positions
- Administrative cost per square foot

Labor Redeployments

- Employee satisfaction
- Percentage of employees trained or upskilled
- Staff turnover rate
- Internal hire rate

Service Improvements

- Customer satisfaction scores
- Average work order/ ticket time to close
- Number of "re-do" calls fielded

Risk Reductions

- Percentage system uptime
- Average age of currently open work orders/tickets
- Number of work orders/ tickets submitted by staff

Source: EAB interviews and analysis.

Group Discussion

Which of the four goals is **most influential** in how you are approaching admin innovation and redesign? Why?
(*costs, labor, service, risk*)

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Modern Components of Admin Redesign

Best Opportunities for Complex Research Universities to Pursue

SECTION 2

Six Components of Innovative Admin Redesign

Focused Structure

Intentional outsourcing, partnerships, centralization, and shared services.

Principled Activity Offloading

Advanced Scaling

Skilled People

Highly-trained professionals able to rapidly fill gaps within and improve organization.

Hyper-specialization

Agile Staffing

Responsive Processes

Maximized distribution of technological- and tested-solutions to team-specific needs.

Democratized Process Redesign

AI-Driven Process Automation

Outsource the Right Functions For Your Context

Institutions Selectively Outsource to Refocus Staff Focus and Capacity

Lycoming College

Network Management

- Lycoming outsourced all network management to Apogee, **significantly decreasing staff burden**
- Established model of fixed annual fee with regular check-ins to clarify relationship expectations

University of Dallas

Infrastructure Management and Security Operations

- University of Dallas partnered with OculusIT to outsource:
  - Infrastructure management
  - Security operations; 24/7 NOC[1] and SOC[2]
  - End-user support
- Partnership expanded security coverage and **modernized IT ecosystem**

Dominican University of California

Entire IT Operation

- In 2024, Dominican outsourced all IT services to Collegis Education
- Collegis hired selection of existing Dominican IT staff
- Gradual shift of IT services to Collegis' infrastructure and management

Six Considerations Before Outsourcing a Function

- Perform value for money analysis
- Identify level of complexity of the function
- Consider value of incremental improvements (or decreases) to service levels
- Calculate expected frequency of activity
- Understand function's burden on staff
- Match strategic value of function to institutional goals

1) Network operations center.
2) Security operations center.

Source: Dominican University of California, San Rafael, CA; Lycoming College, Williamsport, PA; "University of Dallas Partners with OculusIT", *Oculus IT*, June 20, 2025; University of Dallas, Irving, TX; EAB interviews and analysis.

Scaling Across Units and Campuses

Lessons from the University of Helsinki's Shared Service Center Design

Centrally Governed, Physically Decentralized

- Campus and service leaders reside in central management group
- Staff physically distributed across four campuses to retain unit presence

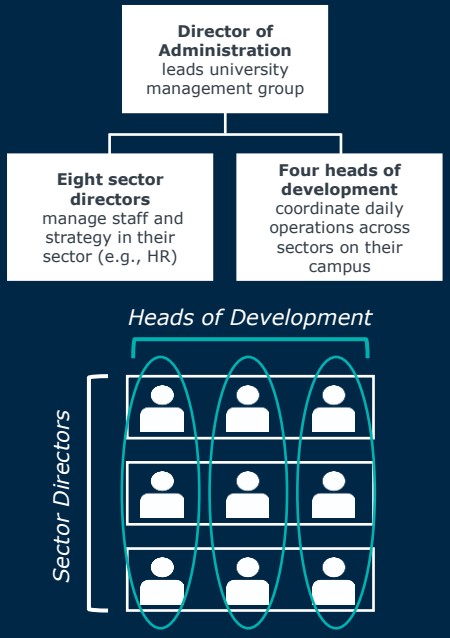
Channel for Top-Down Improvements

- Centralized governance paved way for Director of Administration to implement:
  - Employee upskilling (move from generalists to specialists)
  - Lean process development (including coaches and coordinators)
  - Technology platform consolidation (ex: 150 customer service channels merged into a single user interface)

55 Independent administrative units brought into **singular** University Services

27% **Reduction in administrative staff** (1100 FTEs to 800 FTEs)

University Services' Matrixed Management Structure



Source: University of Helsinki, Helsinki, FI; EAB interviews and analysis.

Designing with Systems and Partners in Mind

Innovative Models Pushing Administrative Work Beyond University Walls

The Community Solution
EDUCATION SYSTEM

Expanding Beyond Standard Shared Services

Six institutions (13,500 students across 12 campuses) established integration across:

- IT systems
- Finance and accounting
- Benefits and compensation
- Performance management
- Recruitment and training
- Marketing and enrollment services

CHARISM's Emerging Vision for Mission-Driven Partnership

Four Catholic, HSI[1] institutions (22,000 students across 4 campuses) pursuing integration across:

- Academic programming
- Enrollment strategy
- Administrative activities
- Faculty research and collaboration

Partnerships Imposed, Whether Willing or Not

"As our system's smaller, rural campuses struggle to survive, my fear is more of the administrative and managerial responsibility will necessarily fall on us as the state's flagship."

Chief Business Officer, Flagship R1 Public

1) Hispanic-Serving Institutions.

Source: The Community Solution Education System, Chicago, IL; CHARISM; EAB interviews and analysis.

Group Discussion

Where in your organization are the best **opportunities** for scaling **"out or up"** activities and responsibilities?

University of Auckland's Function Lead Model

Overview of the Function Lead Model

Function Leads examine Professional Services by **function rather than organizational unit** (i.e., general administration is one function spread across several units). They implement **Function Design Principles**, to drive progress towards improved function efficiency and effectiveness across the university.

What the Function Lead Does:

Controls Budget, Hiring, & Activities

Function Leads ensure that their function's activity, budget, and roles **align with the Function Design Principles**

Implements Annual Function Plans

Function Leads create plans in which they identify opportunities for improved efficiency and **define FTE targets for their function**

Oversees Function, Not Staff

Function leads are responsible for the long-term operational capability of their professional function, **not individual management** of staff in their function

Examples of Function Design Principles:

- Transactional activity should be centralized and standardized
- Delivery teams should only address one activity type
- Organizational structures should have wide spans of control
- Position descriptions should be created from standardized building blocks

Source: University of Auckland, Auckland, NZ; EAB interviews and analysis.

Results of Auckland's Transformation Efforts

Efficiency Gains in Two Areas Secure Financial Sustainability

Organizational Structure

90%

Reduction in unique job descriptions (410 to 45)

22%

Increase in the number of vacancies filled internally (5% to 27%)

Processes

20%

Reduction in transactional activities for administrative functions

#1

Most efficient purchase to pay process compared to peers

Financial Sustainability

Auckland is the **only NZ university not running a budget deficit.**

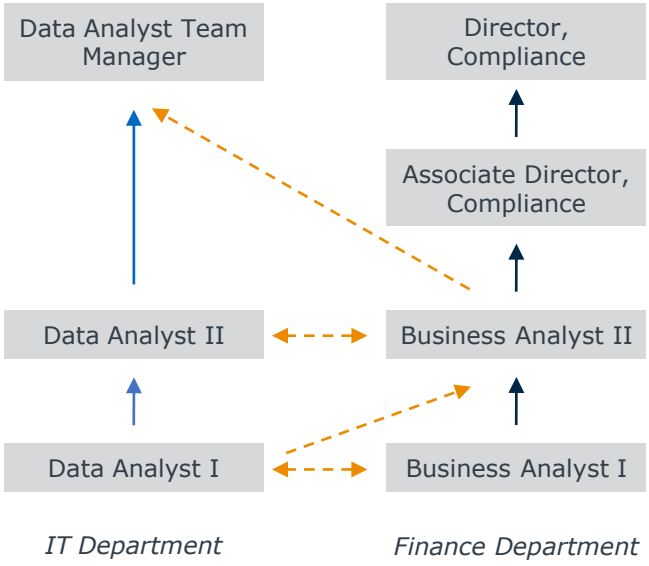
3+

Years of competitively funding academy despite Federal tuition caps

Source: University of Auckland, Auckland, NZ; Support Services Role Redesign, NousCubane; EAB interviews and analysis.

From Career Ladders to Career Lattices

Lateral, Diagonal Mobility Just As Important for Career Advancement as Vertical



Severing the Ties Between Career Advancement, Promotion, and Management

VCU
VIRGINIA COMMONWEALTH UNIVERSITY

- Implemented "promotions in place," encouraging in-seat career development and upskilling
- Eliminated 10% cap for base salary increases

THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC

- Created separate career streams for individual contributors vs. managers
- Highlighted competencies needed to move between streams

Source: George Washington University, Career Path Tools and Resources; Virginia Commonwealth University, HR FAQ Page; EAB interviews and analysis.

Demystifying Campus Career Pathways

Web-Based Tools Can Help Employees Explore Potential Futures at Institution

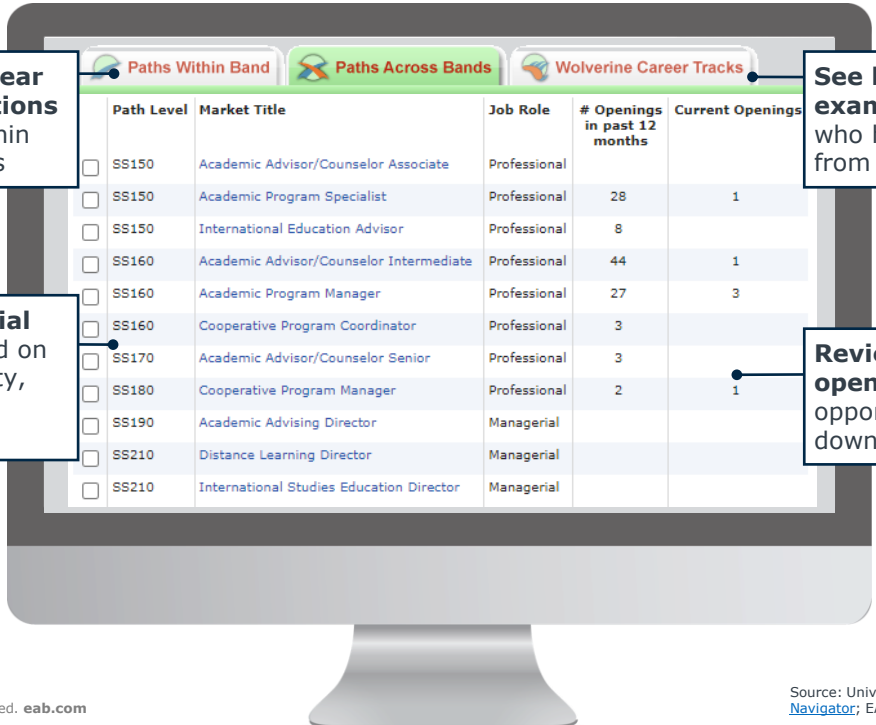
University of Michigan's Career Path Navigator

Explore non-linear career path options by searching within and across bands

Identify potential next roles based on skills compatibility, alignment with current role

See historic examples of staff who have moved from or to roles

Review real-time openings to size opportunity, narrow down options



Path Level	Market Title	Job Role	# Openings in past 12 months	Current Openings
SS150	Academic Advisor/Counselor Associate	Professional		
SS150	Academic Program Specialist	Professional	28	1
SS150	International Education Advisor	Professional	8	
SS160	Academic Advisor/Counselor Intermediate	Professional	44	1
SS160	Academic Program Manager	Professional	27	3
SS160	Cooperative Program Coordinator	Professional	3	
SS170	Academic Advisor/Counselor Senior	Professional	3	
SS180	Cooperative Program Manager	Professional	2	1
SS190	Academic Advising Director	Managerial		
SS210	Distance Learning Director	Managerial		
SS210	International Studies Education Director	Managerial		

Source: University of Michigan, Career Path Navigator; EAB interviews and analysis.

Internal Consulting Teams

Georgetown University Invests in Standardized Methods to Drive Results

Hallmarks of High-Performing Teams

- **Designated Roles**
  Establish ownership and buy-in
- **Diverse Expertise**
  Drives innovative, scalable solutions
- **Required Documentation**
  Facilitates quality control and consistency in delivery
- **Regular Checkpoints**
  Strengthen accountability and enable senior leaders to weigh-in

GU BDOG[1] Streamlines Work with Dedicated Team of Experts

15 FTEs

With public & private sector expertise in:

- Business process improvement
- Change management
- Project management
- Financial analysis

Champions institutional priorities

- Wealth of institutional knowledge
- Mission-aligned
- No inter-departmental charges

~80

Projects completed annually

1) Georgetown University Business Design & Optimization Group
2) Process improvement

Source: Georgetown University, Washington, DC; EAB interviews and analysis.

Table Discussion

What are the best opportunities in your admin functions for greater **specialization**? What are the best opportunities for greater **agility and flexibility**?

Solving Real Problems with a Common Language

UCSD Staff Apply Lean Six Sigma to Real Problems in Real Time

UCSD Process Palooza: *LEAN*ing Toward Success

- 3200+ attendees since 2017 trained in process improvement using Lean Six Sigma methodology
- Kickoff event resulted in 30 improvement ideas and 2 core initiatives
- Activities include a problem-solving competition
- Earned UCSD 2020 CIO 100 award

Six Sigma Project Outcomes

Associated Students
Travel Request Process

- **$96,000** in savings
- **41%** decrease in processing time
- **50%** reduction of advising time
- **80%** increase in customer satisfaction

Process improved by decreasing in person assistance to fill out request form. Previously, 60% of forms were incomplete & 50% required changes once submitted, delaying the process.

Transportation Services
New Employee Commute

- **$105,000** in labor savings
- Implementation of additional improvements planned

Process improved by simplifying the way new hires sign up for parking and commuter options, decreasing staff time required and the wait time for those submitting permits.

Source: EAB Interviews and Analysis; Mojgan Amini, "Process Palooza: UC San Diego LEANing Toward Success", *UC San Diego,* 2018; "Continuous Improvement at UC San Diego," UCSD; "The Roles of Lean Six Sigma", *Go Lean Six Sigma,* 2018.

Process Improvement Gets an Inspiration Board

Compendium of 35+ Redesigned Processes Available Online

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Process	Complexity	Reengineering Considerations	Metrics and Results
Campus mailbox rental and billing		U. of Memphis developed new electronic submission form that eliminated paper request and cancellation forms, data entry errors, and payment processing errors; accounts receivable charges reviewed and reversed; mail services system updated; automated accounts receivable file created for billing	• Elimination of student validation process saves 62 staff-hours per year • Elimination of in-person payments saves 31 staff hours per year
Housing resident check-out process		At U. of Wisconsin-Madison, a complex check-out process resulted in delays in preparing rooms for new students and preparing final billing statements or refunds; teams eliminated batching of refund checks, created an electronic workflow to replace paper forms sent across campus, and cross-trained staff to ensure greater depth and back-up	• Number of days to process student check-out and final billing or refund has decreased from 23 days during the academic year and 36 days at the end of the fall semester to ~7 days

Source: EAB interviews and analysis.

Leveraging Your Investment

Campus-Wide Models Can Operate with Minimal Central Staff

Embedding Process Improvement Capabilities that Facilitate Cultural Shifts

Institution	Central FTEs at Start	Current Central FTEs	PI-Trained Staff	Source of Training
University of Wisconsin-Madison	2	6	713 staff have completed lean training	Training courses offered for free, but in return participants must be willing to participate in future PI projects
University of Alaska, Anchorage	1	1	300 lean white belts; 60 green belts	Green belts initially trained at U. of Washington and now provide free monthly white belt training to UAA staff
Clemson University	2	1	8 embedded lean facilitators; 300 with white belt training	All training delivered in-house, including a three-hour while belt course and purple and senior orange belt training
Carleton University	1	2.5	66 staff	Excellence Canada Process Management Certification
British Columbia Institute of Technology	5	8	74 white, green, and black belts; 300+ with basic lean training	Vancouver-based Lean Sensei trains black belts that teach Lean 101 and white belt courses on campus

Source: British Columbia Institute of Technology, Burnaby, Canada; Carleton University, Ottawa, Canada; Clemson University, Clemson, SC; University of Alaska, Anchorage, Anchorage, AK; University of Wisconsin-Madison, Madison, WI; EAB interviews and analysis.

Group Discussion

What's the most effective way to use or deploy **dedicated process improvement central staff**? How have you maximized their impact?

Reminder: Automation Not Always Equal to AI

Results of Select Institutions' Investments in Automation Technologies

	Temple University	Lipscomb University	Old Dominion University	The University of Texas Rio Grande Valley	University of Kentucky
Finance Function	Controller	Controller	Accounts Payable	Procurement	Budget and Planning
Vendor Product	Wdesk (Workiva)	Rapid Insight	Chrome River	Jaggaer	Axiom (Kaufman Hall)
Process Automated	Populating footnotes in quarterly financial reports	Year-end revenue reconciliations	Submission, processing, and management of travel payments	Submission and processing of procurement receipts	Generation of financial reports, budgets, and plans
Results	**Saved 30+ hours** through decreased report errors and version control issues, faster report creation.	**Reallocation of staff time** from report creation to data analysis	**Faster** reimbursements, fewer faculty complaints	**Reallocated FTEs** to strategic roles; payment processing reduced from a month to less than a week	**90% reduction in time** to produce select reports (e.g., daily tuition models)

Source: Lipscomb University, Nashville, TN; Old Dominion University, Norfolk, VA; Temple University, Philadelphia, PA; University of Kentucky, Lexington, KY; University of Texas Rio Grande Valley, Edinburg, TX; EAB interviews and analysis.

Towards a More AI-Driven Organization

AI Tools Can Reduce Transactional Burden on Staff

USF AI IT Service Desk

Problem: USF student workers manually sorted 100K tickets annually for USF's IT Service Desk; high volume demanded extensive student labor and attention.

- **Tickets are automatically classified** and sorted based on status, service team, issue type, and priority
- Ticket info updates in Jira and creates a **feedback loop** to improve classification

Results

76%

estimated reduction in service desk operating costs ($90K to $21K)

Rice University HR Chatbot

Problem: Low utilization of self-service resources leads to high volume of HR inquiries (~500/month); ~25% abandoned, distracting HR staff from higher skill work.

- Chatbot **answers staff HR inquiries independently**; routes to HR staff if response is unsatisfactory
- Chatbot trained and evaluated **on bank of 250 common HR questions**

Results

400

conversations fielded by HR chatbot in the first six weeks

Source: Jason Hair, "Revolutionizing the IT Service Desk: GPT-Powered Ticket Classification at USF," *EDUCAUSE*, October 11, 2023; Rice University, Houston, TX; EAB interviews and analysis.

Reduce Task Proliferation with AI Tools (Part 1)

Case Studies	Labor Impact
Student Self-Service Johns Hopkins deployed AI tools to resolve most student inquiries across six functions without human intervention.	35-40% anticipated decrease in student services FTE headcount via attrition, position elimination
Report Generation Michigan employed U-Maizey to help migrate system reports across platforms with different coding languages.	More than 300 labor hours saved across 300 reports
Health and Wellness Support Ithaca joins Nebula and ICare platforms to allow counselors faster, more comprehensive access to student histories.	Counselors able to meet with 150 extra students with no additional FTEs
Coding and Cybersecurity Oregon State uses Microsoft Copilot to empower student workers to summarize threat intelligence, analyze code for malware	Full-time staff able to prioritize higher-level tasks

Source: Johns Hopkins University, Baltimore, MD; Dave Weil, "Three Years Since ChatGPT-3.5: Strategic Considerations for AI's Next Phase on Our Campuses," EDUCAUSE Webinar, January 20,2026; Ithaca College, Ithaca, NY; "Faculty and Staff Using AI", *University of Michigan-Dearborn*, September 2025; Oregon State University, Corvallis, OR; EAB interviews and analysis.

Reduce Task Proliferation with AI Tools (Part 2)

	Case Studies	Labor Impact
CAL POLY	**Email Threat Detection** California Polytechnic State University deployed SlashNext, an AI-driven email service, to automate email threat detection.	80% decrease in malicious emails requiring staff review
THE GEORGE WASHINGTON UNIVERSITY WASHINGTON, DC	**Identity and Access Management** GWU partnered with XMS to build on One Identity Active Roles to automate lifecycle account management for campus.	Reduced password reset times from ten minutes to near real-time; enabled active directory centralization
THE UNIVERSITY OF BRITISH COLUMBIA	**EndPoint Detection** UBC developed EDgaR, an automation utility built using Tines and Crowdstrike Falcon, to identify unmanaged devices.	Replaced time-intensive manual CSV tracking; strengthens security posture
California State University Chico	**Help Desk Support** Chico State built an IT Chatbot powered by Zammo.ai to respond to questions, open tickets, and connect users to live support.	Reduced service desk staff workloads

Source: "AI-Powered Email Monitoring Enables SOC Students to Improve Campus Security", *EDUCAUSE*, May 3, 2024; N Yousaf, "GWU Simplifies and Automates", *One Identity*; "UBC Cybersecurity", *The University of British Columbia*, June 20, 2025; EAB interviews and analysis.

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