The 25% Plan
By Cathy Bates

An Exercise in Workload Assessment and Planning for your Team

As higher education leaders, we are sometimes in a situation where our teams are working at capacity with no spare ability to work on new priorities. Perhaps they have developed so many application customizations for faculty, staff, and student use that they can only maintain what has been built. Sometimes they are managing services for faculty and students with paper-based processes or disparate systems that lack data integrations. Sometimes, they are supporting or working in outdated systems and applications without the benefit of automation tools.

In these situations, when staffing levels are constrained, leadership is needed to change the workload enough to be able to work on more important priorities for the campus. The 25% plan is a way to achieve this goal. Simply put, the challenge is for teams to determine what would no longer get done if 25% of their time was taken away every week. While 25% might seem (and is) an arbitrary number, it must be enough to be significant so that teams really question how and what they spend their time on, but not be so large that the results seem out of reach.

It is time to dust off the 25% plan.

Higher education faces a challenging year ahead as many institutions implement budget cuts, staffing freezes, furloughs, and layoffs. Administrative units manage diverse roles in serving students, supporting faculty, and handling a myriad of administrative tasks associated with campus operations. Even as institutions make plans for phased openings of their campuses, it is likely that the administrative workforce will be struggling to provide services with reduced levels of staffing. Discussing this exercise as a planning option with leadership and key stakeholders can provide early buy-in that help teams understand the support for decisions and an action plan.

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The 25% plan can be used at the level of teams, across divisions, or campus-wide to create the capacity that institutions will require to face the year ahead or to prepare for a better future. While it's a straightforward three-step process, it requires willpower to make decisions that achieve the goal. Here are the steps:

1. Outline the categories of things that people do and the average percentage of their time doing those categories of work.
2. Rank work on a scale of highest value to lowest value to the mission of the institution and on whether the activity is efficient or inefficient.
3. Review categories for efficiencies that can be gained in process and resources, alternate ways of providing services, or work that should be discontinued, and then create a plan.

Let's look at the steps in more detail:

Step 1: Categorize and allocate time percentages

The first step is determining how teams spend their time based on categories of work. Since a major goal is to stop spending time on some things, ask questions that help to determine duties and activities that are most important, what seems like busy work, and activities that aren't the best use of time or do not add value. The practice of involving teams in the identification of high and low value work is empowering and should be done regularly.

- What work is critical to the mission of the university?
- What work does not fit the mission as clearly?
- What work might you stop doing based on low demand or outdated services?
- What work is exception-based, paper, highly manual, or one-off?
- What do you spend time on that is a waste of your time, could be done more effectively or better by someone else, or is not the highest use of your position description?

Teams might use a services list, a calendar of work by annual business cycle, ticketing system reports, or position descriptions to help think of a robust set of work activities. It may help to start with broad duties and then become more granular as needed. *Note that this work could also be done as pre-work for a team meeting in which the activities are discussed and refined.*

Next, as a best guess, allocate percentage of time to the activities on the list. You could estimate percentage across the team, with the entire list representing 100% of the workload, or do it on a person-by-person basis based on activities. Even if estimates are somewhat rough, this step provides a method to gauge the effort of activities relative to each other and will help in determining how to change enough workload to make a difference in capacity. At the end of this step, you should have a list of team activities and some sense of effort involved for each activity across the team.

Step 2: Rank work activities from highest to least value-add

In the second step, the goal is to rank work activities from highest to least value-add. A good way to approach this is to develop levels for high, medium, and low values with respect to work being directly tied to the institution's mission or strategic objectives. A secondary ranking should be included to note whether the activity is currently performed efficiently or inefficiently.

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After completing the rankings, sort the activities list by the high, medium, and low rankings to show the percentage of work that is of lower value and should be considered for discontinuation or alternate ways of providing the service. This is the most important focus area for reaching capacity goals. A secondary step is to look at work that is ranked at medium and high value but is flagged as inefficient. Consider options that can improve processes and service delivery and reduce the amount of time required to provide important services. In some cases, there may be costs associated with improving efficiencies that will need to be weighed against the value of resource capacity.

Step 3: Create an action plan that will create desired capacity

The final step is to review the activities that are candidates for discontinuation or efficiency improvements. Consider alternate ways that commodity activities can be completed by exploring artificial intelligence solutions or alternative sourcing arrangements. From the list of opportunities, determine which are the best candidates to research and act upon in order to meet the team capacity goal.

This is an opportune time to involve leadership and key stakeholders to ensure agreement about high and low value work, agreement to work on inefficiencies, and to garner support for necessary plans.

There couldn't be a more important time to undertake this work. Workloads in higher education must be examined. Higher education is facing an unprecedented level of uncertainty this year and cannot afford to be reactionary. It's time to get out ahead of the next wave. It's time to create capacity to not only face the next wave, but to leap to a better future.

This post was authored by Vice President Cathy Bates, who advises clients on technology strategic planning, information security, and initiatives that transform institutional academic, administrative, and research capabilities.

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