**PROFESSIONAL SERVICES SATISFACTION SURVEY**

**FINANCE, PLANNING & COMMERCIAL SERVICES**

**MARCH 2013**

Finance, Planning & Commercial Services, which by name alone, shows the broad range of activities under its umbrella, are a team all working together to provide a service to our customers through efficient, proactive, knowledgeable, approachable staff at all levels. We discussed and have considered the content of the 2011/12 Professional Services Satisfaction Survey in tandem with the results from the employee engagement action plan, the IiP work and the work on University values.

The Service Heads initial response to the survey results was very positive whilst recognising that there is always room for improvement and we understand the need to work effectively together resulting in a more unified and cogent service.

Overall we are pleased with the feedback which showed that we are:

* Efficient, willing staff
* Helpful and attentive to students
* Responsive and informative
* Easy to find information on intranet

We have acknowledged that from the findings of the survey we have opportunities to improve our service and build on the above statements such as:

* The need to review and streamline our processes and forms
* The need to work with our colleagues in other Services and Faculties to improve systems and procedures.
* The need to refresh our approach to customer service.

The noted points are a base for us to take on board all comments and observations whilst not forgetting to recognise our own staff by encouraging contribution, recognising achievements and success thus giving a sense of ownership and pride in working for the University.

As a department, we are committed to continuous improvement benefiting all our customers as well as the staff within the department. We value the feedback and have shown in our action plan the first steps towards achieving a more responsive, interactive and supportive service.

**Lynne Smith**

**Operations Support Manager**

**on behalf of**

**Colin MacDonald, Acting Finance Director**

**Finance, Planning & Commercial Services**

**22 March 2013**

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| **PROFESSIONAL SERVICES ACTION PLAN** | |  |  |  |
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| **FOR PERIOD OF: CALENDAR YEAR 2013** | | **AREA: FINANCE, PLANNING & COMMERCIAL SERVICES** | | |
|  |  |  |  |  |
| **ACTION** | **PRIORITY** | **TO BE ACTIONED BY** | **DEADLINE DATE** | **REVIEW (impact of effectiveness of actions)** |
| **Communication** |  |  |  |  |
| Contact the two people who have raised specific issues regarding the service. | High | Head of Procurement/ Treasury & Transactions Manager | 22/03/2013 | A positive reaction to response and a greater understanding of processes. The second issue was not directly Finance, Planning & Commercial Services related, however a proposed solution was put forward to be discussed with the areas concerned. |
| Provide positive feedback to specific individuals and teams who have been mentioned in the Survey. | High | Heads of Department | 22/02/2013 | Supports IiP framework and employee engagement in areas of reward and recognition, involvement and empowerment and people management strategy. |
| Continuous improvement of website | High | Head of Systems & Assurance | Ongoing | Availability of clear, concise and accurate information reducing issues with failure to find information or guidance therefor reducing staff queries. |
| Continue to build relationships and understanding of service areas and faculties needs and requirements through tailored forums, user groups, roadshows and regular meetings | Medium | Heads of Department | Ongoing | Strengthening understanding and relationships between Finance, Planning & Commercial Services and its customers. |
| The dissemination of information from PEG and other groups and committees to relevant staff. | High | Acting Director of Finance | Ongoing | Increased awareness amongst Finance, Planning & Commercial Services staff. |
| **Systems & processes.** |  |  |  |  |
| Accelerated use of SharePoint | Medium | Treasury & Transactions Manager | Ongoing | Streamline processes of shared functions across the University avoiding unnecessary duplication and ensuring data is relevant, accurate and current. |
| **ACTION** | **PRIORITY** | **TO BE ACTIONED BY** | **DEADLINE DATE** | **REVIEW (impact of effectiveness of actions)** |
| Review of Treasury & Transactions procedures | Med | Treasury & Transactions Manager | Ongoing | Streamlining the Treasury & Transaction procedures ensuring staff have a full clear understanding of our procedures thus giving a more effective service to our customers. |
| Streamline US Loans procedures | Med | Treasury & Transactions Manager | 01/07/2013 | Improving administration service for Finance, Planning & Commercial Services, Student and Academic Services and students. |
| **Student services** | **Low** |  |  |  |
| Respond to comments regarding staffing levels. | High | Treasury & Transactions Manager | 01/07/2013 | Introduce multitasking within Treasury & Transactions enabling certain tasks to be completed by other teams during a quieter period whilst maintaining an excellent standard of service. |
| Review all written correspondence to students | High | Treasury & Transactions Manager | 01/07/2013 | Increase understanding of the impact on the student of content i.e. debt cycle letters. |
| Continue to improve relationship with ISAS | High | Treasury & Transactions Manager | Ongoing | Referral of students at early stages of financial difficulties to negotiate and customise a revised and acceptable payment plan. |
| **Training and development** |  |  |  |  |
| All Finance, Planning & Commercial Services staff to attend and contribute to a customer service training event. | Medium | Acting Finance Director & Heads of Department. | 31/07/2013 | Enhance the customer experience both internally and externally. |
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| Reinstatement of Customer Focus Group | High | All staff | 01/05/2013 | Allowing all staff to contribute to continuous improvements, effectiveness and reputation of the department |
| Initiation of a social group | Low | All staff | 15/03/2013 | Initially giving the professional services staff based at Sighthill to attend social events outwith the working environment |

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