

Finance Department Customer Feedback 2015

Customer Focus Groups:

We conducted a number of **customer focused feedback session** as part of our 2015 Quality System Review. These focus group sessions were held on Feb 12th 2015 and were moderated by an independent facilitator from Invisio Consultants Ltd and detailed notes of the discussions were taken by a dedicated transcriber also from Invisio.

The groups were organised mainly by the nature of business interaction with the Finance Department and were grouped as follows:

- **Payroll and Pensioners**
- **Researchers**
- **Decision Support Budget Managers**
- **Procurement**

Across all four customer focus groups there was very positive feedback regarding the Finance Department personnel. Participants stressed the point that Finance Department staff were very dedicated and always willing to “go the extra mile” in respect of meeting exacting demands around customer requirements. Participants noted that Finance Department staff resources were often stretched. As a result participants reported that any staff absences or staff turnover had an immediate detrimental impact on service.

Where participants reported difficulties these were due largely to one or several of the following:

- complexity of processes,
- the manual nature of processes (e.g. requirement for multiple physical sign-offs),
- lack of visibility of processes (e.g. knowing when an invoice has been paid),
- lack of flexibility (e.g. around using non-approved or one-off suppliers) and a lack of financial knowledge or training on the customer’s part (e.g. assignment of VAT codes).
- Across all groups participants reported issues around the user interface on the Agresso system.

These issues and participants’ suggestions for addressing them are covered in detail in the accompanying customer feedback reports which have been sent to all of the participants of these sessions.

The Finance department are in the process of planning a significant upgrade to its main financial application which should help improve the user interaction issues. Improvements around training on various financial and procurement systems and processes are also planned. All key business process documentation is now published on our website.

Online Surveys:

We also conducted some **online surveys** for the following customer groupings:

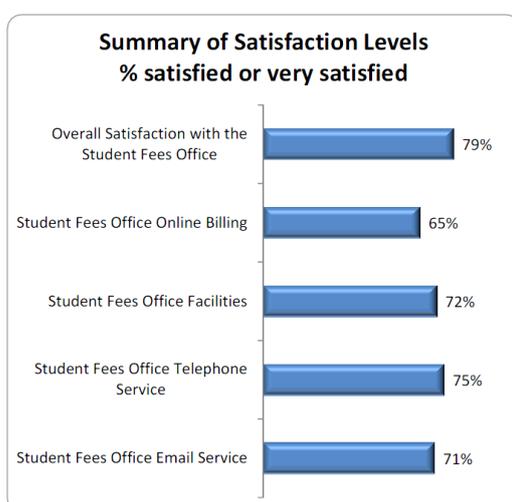
- **Student / Parents**
- **Funding bodies and Audit Agencies**
- **Suppliers of Goods and Services**

These were facilitated by an independent facilitator from Invisio Consultants Ltd.

The survey of students on their interaction with the fees office was generally positive, with several interesting points raised. Students suggested that the fees office should be opened to the public for longer each day.

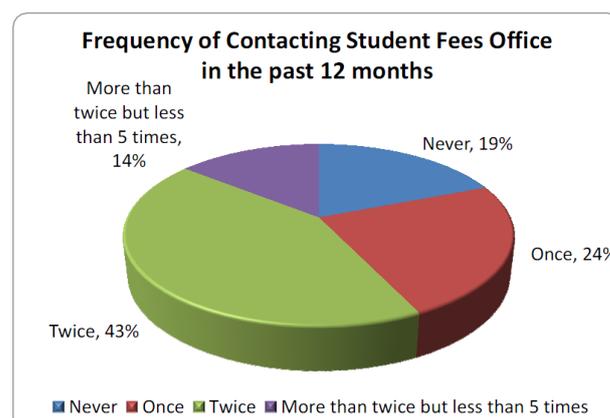
Students indicated that their preferred method of contact was via student email. The Fees Office and ITD have been developing a system-generated email reminder for students with overdue fee balances. The survey also confirmed that for the majority of students who pay fees their parents are the bill payers.

Visual Summary of Satisfaction



Contacting the Student Fees Office

43% of respondents had contacted the Student Fees Office twice in the past 12 months.



The main findings from the survey with the **Suppliers of Goods and Services**, **Government Bodies** and **Funding Agencies** are as follows:

Overall Satisfaction

- 64% of suppliers and all agencies were overall satisfied or very satisfied with the Finance Office.

Modes of Contact

- 75% of respondents who used the Finance Department website were satisfied with the website.
- 94% of users were satisfied or very satisfied with the Finance Department telephone service.
- 76% of respondents were satisfied or very satisfied with the Finance Department email service.
- 58% of supplier respondents were satisfied or very satisfied with the timeliness of payments for supplies of goods or services.

Audits of the Finance Department

- Three agency respondents conducted audits of the Finance Department. On all but one measure for support before, during and after the audit process these respondents were all satisfied or very satisfied with the support received. One respondent indicated “Neutral” satisfaction in terms of “Close out after visit”.

Research Finance Reports

- All agency respondents were satisfied or very satisfied with the timeliness and accuracy of research finance reports, and with the speed of response and thoroughness of replies to queries.

Accounts Payable

- 71% of suppliers had had an invoice returned due to not quoting a valid Purchase Order number.
- 58% of suppliers felt that the requirement for providing a valid Purchase Order number had improved processing.
- All suppliers felt that a reminder email when their tax clearance was about to expire would be useful.
- 50% of suppliers indicated that they would be satisfied with an email only system of dealing with queries to the Accounts Payable section, and 50% indicated that they would not be satisfied with such a system.
- Suggestions for improving the Accounts Payable process included speeding up the process and being more proactive in dealing with problematic payments.

Tender Process

- 86% of respondents who had been through a tender process were satisfied or very satisfied with the courteousness and professionalism of staff involved with the tender process.
- All respondents were satisfied or very satisfied with the clarity of communication during the bid process.
- All respondents were satisfied or very satisfied with the ease of getting in touch by phone or email.
- 86% of respondents were satisfied or very satisfied with the degree to which the Finance Department response to queries met their needs.
- 86% of respondents were satisfied or very satisfied with the openness and fairness of the tender process.
- 86% of respondents were satisfied or very satisfied with the clarity and consistency of tender documents.

Procurement

- 29% had a good knowledge and 57% had some knowledge of the UL procurement policy and procedures.
- 77% of respondents had never visited the Procurement website.
- Four out of fourteen respondents indicated that they were aware of recent policy developments for centralising public procurement in Ireland, including the setting up of the Office of Government Procurement.

Positive Aspects of Dealing with the Finance Department

- Respondents reported that Finance Department staff were friendly, helpful and polite.

Suggestions for Improving Service

- Suggestions for improving the service delivered by the Finance Department included improving ease of contact and speed of response.

Overall Satisfaction in Dealing with the Finance Department:

Suppliers of Goods and Services

64% of suppliers were overall satisfied or very satisfied with the Finance Office. This represented an average satisfaction rating of 3.79 out of 5.

Overall satisfaction with the Finance Office - Suppliers						
	% of					Dissatisfied -> Satisfied
Avg out of 5	1	2	3	4	5	
3.79	0	7	29	43	21	

Key

Very dissatisfied (1)	
Dissatisfied (2)	
Neutral (3)	
Satisfied (4)	
Very satisfied (5)	

Government Agencies & Funding Bodies

All agency and government body respondents were either satisfied or very satisfied with their interactions with the Finance Office.

Overall satisfaction with the Finance Office - Agencies						
	% of					Dissatisfied -> Satisfied
Avg out of 5	1	2	3	4	5	
4.40	0	0	0	60	40	