# Organizational Excellence Leadership Council Meeting Summary
# Thursday, July 15, 2014

**_Attendees_** Council: Chair, Bob Pianta; Virginia Evans, Thomas Gorski, Hossein Haj-Hariri, Chris Holstege, Rich Kovatch, Jim Matteo, Christina Morell, Rick Myers, and Tamera Sole; Ex Officio: Milton Adams, Nancy Rivers, Sarah Collies, and Mary Brackett
**_Absent:_**  Lee Baszczewski, Erika James

## I.      OE Portfolio

A brief update on the status of each initiative on the OE portfolio was provided by OE staff and OELC members.

> Managerial Reporting – The project has a project manager and team under the AVP for Finance. While the project was initially scoped as a technological solution, other related issues have emerged. Some of the benchmarking study data is informing this work.

> Research Administration – The OELC recently saw a demo of the proposed Research UVA system. It is more comprehensive than originally conceived. Process mapping of major research administration processes continues in order to identify additional areas for streamlining and improvement.

> Office Supplies – The communications for the project will continue to roll out in the coming weeks. OE staff will partner with Procurement to prepare a Fact Sheet.

> HR Service Delivery – The focus of the project is not on smaller units who will elect full-service option, so work is underway to understand their needs. There was further discussion about the focus of the project.

> Center for Leadership Excellence – The Center is fully staffed, mostly by reallocations. Their focus is on three deliverables for the first year: Succession Development, Role of the Manager, and Website.

> Internal Communications - The scope of work is being defined by the team, which is comprised of school and central communicators, service providers, and University communications. Alex Rebhorn from UHR will be leading the team. The refined scope and goals will be shared with the OELC.

> Server/Data Center Collection – This project is in discovery phase and more data collection is needed.  ITS is in the process of creating the project structure.

> Email Consolidation – At the recent Information Technology Advisory Committee, there was alignment around standardizing on Microsoft.  First phase would be to

consolidate central system and second phase would be to integrate Darden and McIntire. Sharing calendars is an important consideration.

Emerging Initiatives:
<u>Transactions</u> – Although initially conceived as a separate project, this work is being integrated into existing projects. The Benchmarking study raised awareness about the high-level of transactional activity.

<u>Student Services</u> – Customer Relationship Management solutions were previously discussed by the OELC, as well as SIS, and Graduate policies. No specific work is currently underway.

<u>Facilities Management</u> – The OELC discussed the Facilities benchmarking presentation. The OELC needs to follow-up with FM and define some next steps.

<u>Advancement</u> – This is a challenging area due to the structure with schools and central and a lack of unifying philosophy. OELC can provide assistance with process simplification.

<u>Leveraging the Benchmark</u> – Although the benchmarking study is completed, there is much more opportunity to leverage the data and findings.

## II.     Discussion of Year One

A great deal has been accomplished in the first year. A structure was established and several significant projects were initiated or influenced by OE. Many people have been engaged across UVA. We must continue to pull people into the conversation and need to be mindful or opportunities to engage more people in our vision.