

## Organizational Excellence Leadership Council Meeting Summary Monday, June 16, 2014

**Attendees:** Council: Chair, Bob Pianta; Virginia Evans, Hossein Haj-Hariri, Chris Holstege, Rich Kovatch, Christina Morell, Rick Myers, Tamara Sole and; Ex Officio: Milton Adams, Nancy rivers, Sarah Collie, Lee Baszczewski, Mary Brackett  
**Guests:** Gerry Kane, Melody Bianchetto, Vonda Durrer, Don Reynard, Bob Sweeny, Kathryn Jarvis  
**Absent:** Council: Erika James, Thomas Gorski, Tamara Sole, Jim Matteo

### I. Update on Efforts to Expedite Research UVA

Gerry Kane presented a prototype of Research UVA. Functionality will include: PI Dashboard, goldenrod Forms, budget tool, approvals engine, ESHARP integration, OSP Document Queue, and reporting capability. Research UVA will also link to other research-related University systems including Effort reporting, Recon, COI, Fixed Assets, Funding, etc.

The Research UVA team has developed a collection of application prototypes which will be presented to faculty representatives.

#### Research UVA Timeline

Summer 2014	Feedback from Faculty
Winter 2015	Test the system
March 2015	Go live with Research UVA
Summer 2015	Complete imaging of all active files

### II. Functional Initiatives for OE Portfolio/Program Updates

#### Information Technology

OELC agreed to add two ITS projects – Server/Data Center and Email Consolidation – to the OELC portfolio

#### Student Services

Lee Baszczewski shared a summary of discussions with the student services areas that have led to the identification of 3 possible new initiatives: 1) CRM-Customer Relationship Managements 2) Space Management 3) Graduate Policy. OELC supports continued exploration in Student Services – CRM and SIS improvements in the areas of Admissions, Financial Student Services, and University Registrar.

#### Strategic Sourcing of Office Supplies Communications

The OELC received a copy of the primary slide deck for communication developed with input from the Engagement and Communication Subgroup.

#### Quality CORE Network

The Quality CORE Network has been established with diverse engagement.

### **III. University Advancement (Development) Benchmarking**

Bob Sweeny presented benchmarking data that was analyzed from GG&A, a well-respected benchmarking institution of Development in Higher Education.

The UVA Advancement System is the most complex in the country, with 26 foundations, 15 of which raise funds. Advancement has recently hired an Associate VP to help them in their organization. There is also a gift processing improvement initiative underway.

Recommendations include leveraging elements of the most effective centralized services, working with the Council of Foundations to explore synergies between and among foundations and central services, reviewing and refining gift officer performance metrics, and expanding adoption of shared metrics and consistent reporting.