

## Organizational Excellence Leadership Council Meeting Summary Wednesday, November 18, 2014

**Attendees** Council: Chair, Bob Pianta; Virginia Evans, Hossein Haj-Hariri, Chris Holstege, Arlene Keeling, Jim Matteo, Christina Morrell, Rick Myers, Nancy Rivers, Tamara Sole; Ex Officio: Sarah Collie, Lee Baszczewski, Mary Brackett; Guests: Susan Carkeek, Elizabeth Allen, Eric Denby, John McHugh

**Absent:** Milton Adams, Rich Kovatch, Peter Brunjes, Len Schoppa

### I. HR Service Redesign Project Planning

The HR initiative seeks to transform human resources to play a vital role in achieving the University's goals and aspirations, and is a partnership between Organizational Excellence and HR. Ernst and Young (EY) will be the University's external consulting partner and lead the HR current-state assessment and redesign effort. The design scope includes all aspects of HR across the University's academic division and Medical Center to define a future state strategy (people, process, technology) and develop a roadmap for change.

The project timeline is December 2014—March 2015. EY will be on grounds to complete the following work:

- Current state assessment (synthesizing data already gathered and collecting additional data)
- Understanding the University's needs and develop a future state
- Develop a business case and prioritized implementation plan.

### II. Travel and Expense Management Project Update

The Travel and Expense Redesign Initiative Goals include: streamline the travel booking and expense management processes; enhance ability to provide assistance due to travel disruptions (duty of care reporting); enhance compliance with federal export control regulations; and better air, hotel, and rental pricing.

The project team has just completed the discovery and current state assessment phase, including 40 focus group sessions attended by over 300 participants, process mapping, review of policies and procedures. The team researched higher education and corporate best practices and compiled travel data from other Virginia universities.

Key Findings:

- Multiple sets of rules are confusing; No data entry standards
- Actual expenses take almost 3x longer than per diem but cost is only 3% higher
- Process cost is \$85 per travel reimbursement
- 16% error rate on payment vouchers
- Low levels of automation; duplication in preparation and approval processes
- Peer Best Practices include: Travel office, Travel card, Integrated electronic workflow

OELC supports a single solution with flexibility for travel management (on-line/in-person/agent).

Next Steps:

- Prototype a design with focus groups
- System selection
- Implementation
- Training