

Organizational Excellence

2018-2019 ANNUAL REPORT



CULTURE OF QUALITY

The Organizational Excellence (OE) Office advances a culture of collaboration, high performance, and continuous improvement at the University of Virginia (UVA). OE partners with schools and units to support core mission activities and realize the University's goals. This report highlights organizational excellence accomplishments from across the University.

- Adding Value
- Reinvesting in Priorities
- Saving Time & Money



EXCELLENCE EVERYWHERE

Lowered textbook costs • Disconnected unused phone lines • Promote center • Provided onsite • Streamlined technical assessment process for units • Assisted with funds management for international programs • Promoted the bicentennial with commemorative items • Streamlined building code inspection process • Centralized infrastructure for giving and engagement • Improved student door code process • Implemented new financial aid-related product • Enhanced data analysis and visualization to inform decisions • Added 12-month planning for conference groups • Expanded mail delivery routes through increased efficiency • Redefined roles to streamline recruitment process • Developed web-based safety training modules • Reconfigured fine arts storage • Modified use policy for Morven property • Created internal controls process for personnel actions • Redesigned course materials production • Developed a database to track center activity • Collaborated on sports media production class • Aligned resources for efficiency • Used cost-efficient postal rates • Supplemented custodial services with vendors • Switched to electronic files • Decreased catering costs • Reduced office space rental • Deployed Office365 for collaboration and communication • Provided system access to enable cooperation • Collaborated on external grants submission • Increased community outreach • Automated cash deposit reconciliation • Streamlined vendor registration with new portal • Reduced waste and costs with Surplus Store • Upgraded mailing equipment for print jobs • Enhanced administrative infrastructure • Mapped processes for recruitment lifecycle • Initiated comprehensive strategic planning process • Migrated study abroad database from servers to the cloud • Transitioned to mental records management • Provided textbook rentals • Reduced travel-related expenses • Used technology to reduce lab inefficiencies • Leveraged sponsorships to offset costs • Collaborated to expand recycling programs • Completed office moves under budget • Increased minimum pay rate • Cosponsored events with national speakers • Kept rates flat for customers through efficiency • Reduced food waste • Launched new websites to improve communication • Installed specialized lockers for student packages • Provided multi-modal technology training • Consolidated multiple systems into one • Improved ability to push computer updates • Automated tracking for international student and scholar visitors • Moved records from paper to online • Saved departmental costs for technology • Shared resources between departments • Completed feasibility studies for projects • Vacated rented storage space • Provided financial aid offers earlier to potential students • Developed consistent treatment guidelines for student concussions • Created new staff recognition award • Established food pantry to address student food insecurity • Hosted two-day accessibility institute for instructional developers • Implemented web-based course request program • Launched new human resources technology • Improved training methodology • Reassigned duties to unit best suited to efficiently accomplish • Updated resident move-out process • Expanded service options to support technology launch • Enhanced accessibility of several websites • Improved subaward process • Hired videographer for museum program • Reduced book festival events for adults • Simplified athletic scholarship renewal/non-renewal process • Improved digital textbooks access • Reorganized team • Donated office equipment to another unit • Provided in-house technical assistance to customers • Achieved paper neutrality • Collaborated to support reorganizing department • Started use of brand toolkit • Proposed an innovation center • Produced video series to bolster new student orientation • Continued restructuring of human resources and finance • Improved access to management reporting information • Updated construction specification guidelines • Initiated two-hour move-in timeslots • Hired instructional designer • Renovated administrative visits • Improved conference room technology • Saved time using HR student hiring process • Used greater functionality of admissions platform • Developed and deployed data analytics application • Moved certificate programs to the student information system • Used in-house service providers • Improved safety and reduced lost workdays • Renegotiated contracts • Outsourced technology support • Reduced paper and event waste • Partnered with another university to reduce costs • Embedded several school-specific counselors • Added ways for employees to contact human resources • Created employee community council • Expanded use of online Faculty Annual Reporting system • Contributed revenues to support first generation students • Upgraded wide-format printing capability • Updated student Substance Use Disorder services • Centralized IT helpdesk to serve multiple units • Supported international travel for students and faculty • Optimized student financial aid application process • Eliminated two offices and updated two more • Developed in-house budget request tracking system • Engaged students to complete a sports branding project • Reduced facility costs • Presented at conferences virtually • Renegotiated phone bill • Updated policies/governance of UVA-related organizations • Added position to streamline providing services • Created online cost transfer justification forms • Developed portal to see all UVA online programs • Implemented a new student payment portal • Made vendor registration improvements • Created conference residential assistant position • Consolidated gift policies into one-stop manual • Increased reach of Body Positive Program • Improved administration of online programs • Implemented enterprise space management software • Improved department financial health • Decreased energy consumption • Implemented parking garage pay stations • Participated in incentivized apprentice program • Coordinated fundraising appeals • Expanded network of approved caterers • Collaborated to project philanthropic cashflow • Partnered to support Athletics brand communications • Engaged Ph.D. students in public service mission • Eliminated cash deposits and transactions • Improved department marketing and recruiting processes • Refined research study startup process • Consolidated staff duties • Launched updated wellness program • Redesigned IT support for faculty and staff • Began developing succession plans • Streamlined process to incorporate undergraduate student researchers • Piloted in-house faculty self-review platform • Streamlined business operations • Consolidated positions • Shared meeting space instead of renting • Increased low-energy savings in research labs • Implemented paid parental leave • Continued communities of practice • Partnered to manage UVA's branding marks • Revised recruitment materials and video • Realigned reporting relationship to support employee development • Reduced printing costs for resource materials • Created construction subcontractor database • Added bus service hours • Automated data monitoring for sponsored programs • Created centralized documents about online learning practices • Adopted University-supported survey tool • Expanded programming at Morven property • Sought external funding sources • Eliminated unnecessary positions • Improved student accessibility through collaboration • Created team to support specific student populations more • Hired new community resource coordinator • Launched brand development initiative with UVA-Wise • Established new relationships across Grounds • Received donation as part of vendor contract • Created new online roommate agreement system • Implemented student peer financial counseling program • Procured additional prequalified contractors for sitework • Increased availability of advancement training • Reduced time to coordinate student interviews for training program • Expanded availability to provide personalized benefits counseling • Piloted faculty recognition program • Developed strategic framework for academic space • Redesigned graduate professor development program • Developed new curriculum planning tool •

261+
Improvements,
Partnerships,
and
Cost-Savings

CONSULTING

OE partnered with schools and units across Grounds to provide custom consulting to help them achieve their desired outcomes related to strategic planning, process improvement, leadership, and organizational change. The 20+ engagements varied in duration and complexity.

★★★★★ 4.9/5 Overall Quality of Services and Deliverables

★★★★★ 4.9/5 Would Recommend OE to Others

2018-2019 ENGAGEMENT HIGHLIGHTS:

- **Advancement Annual Giving Consortium** – taught leaders from 40+ institutions how to use several Liberating Structures in their work
- **Alumni Association** – worked with the team to define core values and act on them
- **Batten School** – led an interactive Alumni Advisory Board retreat to support a successful leadership transition and identify priorities
- **Center for Teaching Excellence** – developing a process for learning technology software selection and integration
- **College of Arts & Sciences** – guided efforts to identify and implement business process improvements
- **Department of Safety and Security** – facilitating strategic planning sessions to guide the creation of the new department and establish shared mission, vision, values, goals, and action plan
- **Human Resources Business Partners (Academic Division)** – designed activities to promote connection and community within a new team
- **Office of the Executive Vice President and Provost** – coordinating the implementation of faculty hiring process improvements
- **Office of Sponsored Programs** – collaborated to develop a request for information for a cloud-based system replacement as part of ongoing efforts to support research administration improvements
- **School of Engineering** – helped the diversity and engagement team define its vision and goals, and prioritize activities; led retreat sessions to prepare the advancement group for a successful campaign
- **Senior Vice President for Operations** – managed a project to improve Capital Project processes, from initiation to completion, and pilot improvements this year
- **Special Collections Library** – executed a team retreat to enable planning and change preparation
- **Vice President for IT** – planned and facilitated a Digital Transformation summit to consider potential high impact upcoming projects

SUPPORTING “OURS TO SHAPE”

A Vision of the University’s Future

Through the “Ours to Shape” program, President James E. Ryan invited UVA faculty, staff, students, alumni, and community members to share their ideas about the themes of community, innovation, and service to help create a shared vision for UVA. Participants contributed input through a website and outreach sessions.

The OE team supported the planning process by facilitating eight outreach meetings, including sessions for the executive vice president and chief operating officer areas, the executive vice president and provost areas, and the School of Engineering. Additionally, OE provided facilitation design for another 18+ sessions and contributed to the refinement of ideas. These sessions gathered input from hundreds of faculty, staff, and students.

In addition to facilitation support, Organizational Excellence assisted with the aggregation and analysis of 2,600 comments from the website and in-person events. This work enabled the strategic planning committee and executive leadership to identify key opportunities to inform the strategic plan.

Provost-area participants generate ideas at an Ours to Shape outreach session.

UNIVERSITY PROJECT PORTFOLIO AND INITIATIVES

The University Project Portfolio (UPP) is a unified approach to identify, prioritize, plan, and coordinate projects for optimal outcomes to achieve desired goals.

- Convened regular project manager meetings to share information and align project activities
- Facilitated OELC governance of UPP, including iterative review and feedback on projects and ongoing monitoring of portfolio progress, issues, and results

Project Closeouts: 4

- Faculty Annual Reporting
- Identity and Access Management Phase 1
- Strategic Sourcing
- Ufirst – Workday Implementation

Active Projects: 7

- Data Governance
- Finance Strategic Transformation
- Identity and Access Management Phase 2
- Major Capital Projects – Planning and Construction Process
- ResearchUVA
- Workday – People Analytics
- Workday Stabilization

Projects Under Review: 7

KEY UPP ACTIVITIES

Portfolio Summit

Organizational Excellence Leadership Council (OELC) members, school associate deans for administration, project leaders, and others convened to do the following:

- Review and affirm the UPP's vision.
- Consider UPP's value and benefits.
- Identify enablers and barriers to successful implementation.
- Generate ideas about how to optimize the portfolio to benefit the projects and University, serving the overarching mission.



New Reports

Ongoing collection and analysis of information enables coordination among the UPP projects and allows for the identification and resolution of challenges. OE created several new reports this year:

- End-User Impact – This report shows the timing and magnitude of individual project impacts on a specific group of people, as well as the cumulative impacts of multiple projects on any one group.
- Risk Register – The register tracks concerns that stretch across the portfolio.
- Status Report Definitions – The project status report of a project's schedule, scope, risks, budget, resources and change management was improved by refining the definitions for more consistent and clear reporting.

UPP Project Roundtable

To help University community members gather information about many projects underway, OE hosted a roundtable session. Representatives from seven projects shared the reasons for the projects, impacts on stakeholders, opportunities for feedback, and answered questions.



Large-Scale Project Insights for Success

To better understand insights across large-scale UVA projects, OE gathered information from existing internal and external project reviews and stakeholder feedback. The goal of aggregating the information was to identify these critical factors for successful UVA projects:

- Institutional Alignment
- Communications
- Stakeholder Engagement
- Effective End-User Implementation
- Post-Project Monitoring

OE shared these findings with current project teams and is piloting a recurring survey to assess these factors throughout a project's lifecycle. Survey results will provide timely feedback, confirming areas of project effectiveness and identifying opportunities for improvement. This feedback will enable project teams to make informed decisions to ensure successful project completion.

For active portfolio projects, teams made significant progress this year. This section includes each project's purpose and highlights several key accomplishments.

Data Governance (Led by Institutional Assessment & Studies)

Develop a governance model that ensures accurate, secure data is available to those who need access.

- Formed a council of 50+ data stewards and stakeholders
- Created an Academic Division Data Governance Framework
- Developing an enterprise data definition process and documentation system

Faculty Annual Reporting (Led by Curry School)

Expand use of an existing online system to streamline collection and reporting of faculty member annual activities.

- Implemented in 3 additional schools with 330 new users
- Increased total users to 750+
- Saving significant faculty time

Finance Strategic Transformation (Led by UVA Finance)

Evaluate finance processes, implement new technology, and improve service delivery.

- Identified 45 opportunities for finance system improvements
- Determined 175 high-level functional requirements and 50+ necessary systems integrations
- Developing a 2-year project plan for finance system replacement

Identity & Access Management (Led by Information Technology Services)

Ensure people get access to necessary resources in a timely fashion through the implementation of a modern framework.

- Creating new faculty/staff user accounts earlier in hiring cycle, streamlining onboarding
- Supporting multiple concurrent roles/user affiliations to enable access to the right services when needed
- Achieving near real-time account access and deactivation

Major Capital Projects – Planning and Construction Process (Led by Senior VP for Operations)

Make the process more clear, consistent, and efficient for all parties involved in capital projects.

- Defined program vision, mission, roles and responsibilities, and benefits of change
- Created a strategic framework and standardized evaluation and communication resources
- Improved 15 processes, including 125 steps, for management of \$3.5B major capital program

Research UVA (Led by Office of Sponsored Programs)

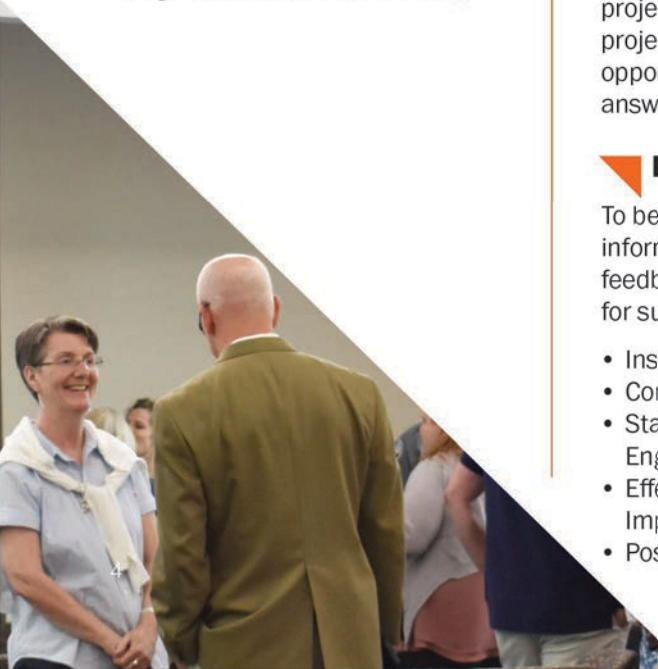
Create streamlined, efficient research administration processes using a customized enterprise-wide technology platform.

- Generated 2,895 non-funded agreements through new electronic process
- Supported \$1.8B in proposal activity and \$405M in awards
- Issued a request for information for a cloud-based research administration solution

Ufirst and HR Workday (Led by UVA Human Resources)

Deliver high quality HR services with new Workday technology.

- Implemented an enterprise-wide HR system with 23,691+ users
- Resolved most cases within 3 days during stabilization post-implementation
- Delivered 2,000+ standard reports and 1,300 custom reports since go-live



QUALITY COMMUNITIES

Through OE programs, University community members connect with colleagues to learn new skills and knowledge they can apply in their work. These programs include short monthly sessions, immersive workshops, and Communities of Practice (CoPs).

QUALITY CORE MONTHLY PROGRAMS

Nine sessions, including creative problem solving, storytelling, design thinking, asking better questions, moving agendas, and resolving conflict.

9 Sessions | 202 Participants

- ★★★★★ 4.8/5 Presenters Were Knowledgeable
- ★★★★★ 4.6/5 Content Applicable to Work
- ★★★★★ 4.6/5 Overall Session Value

"I appreciate the opportunity to **practice and learn** with others."

"Thank you! I left with **direct specific tools** that will be a value-add to my work."



Expanding the Impact of Conference Insights

In 2018, nine representatives from UVA participated in the Network for Change and Continuous Innovation (NCCI) Annual Conference, joining the 200+ participants from across the country. OE staff gave two presentations.

To leverage what they learned, UVA participants shared information from conference sessions they attended to colleagues in an OE session. Topics included creating a coaching culture, measuring change impact, implementing time-driven activity-based costing for higher education, facilitating creatively, communicating about change, and using interactive challenges to learn about process improvement.



COMMUNITIES OF PRACTICE

Project Management

- Launched a new University-wide CoP to enhance project management capabilities and learnings for successful projects
 - 110 members and growing
 - Topics of focus include project management tools, a resource repository, and sharing best practices across Grounds
 - Added project management resource page of basic tools and templates to the OE website

Change Management

- Continued CoP to enable change management practitioners to remain current on lead practices, discuss challenges/opportunities for current change management projects, and network with colleagues throughout UVA to improve change capacity
- Members from three Prosci change management certification cohorts and others
- Topics of focus include a book club of change-related books, review of the updated Prosci portal, and guest presentations from UC Davis and Northwestern on communicating during uncertainty and building change leadership capacity

IMMERSIVE WORKSHOPS

OE sponsored immersive programs this year on Liberating Structures and Prosci Change Management. These longer, in-depth programs enable participants to gain an advanced understanding to apply in their work.

Liberating Structures

To inspire new ways of working together for better results, OE sponsored two immersive Liberating Structures (LS) workshops. Liberating Structures are techniques that shift the way we facilitate meetings, teach, and make decisions. They promote collaboration, creative thinking, and inclusion of diverse perspectives to improve outcomes.

2 Sessions

- 135 Participants Representing 30+ Schools, Units, Foundations, Centers, and the Health System
- 94% Strongly Agreed/Agreed Applicable to Work
- 82% Highly Likely/Likely to Recommend to Colleagues

"I particularly enjoyed working with a **diverse group from across Grounds** who brought such a variety of experiences and ideas to the workshop."

In November, participants learned and practiced seven structures during a two-and-half-hour workshop. The reach of these impactful structures grew further when LS co-developer Keith McCandless led a two-day workshop in April. Attendees experienced 20 structures, learning through doing. Design team representatives, from the medical school, arts and sciences, student affairs, finance, career center, and OE partnered with McCandless to plan and lead the session. Following both sessions, people immediately shared stories about using Liberating Structures.

"Loved it, have already used [LS] in meetings and really enjoy this kind of **creative, inclusive way** of getting people to share and build ideas."

To encourage the spread of LS across Grounds, OE supports users with individual coaching, lunch and learn sessions, and additional workshops.



Liberating Structures session participants

Prosci Change Management

In this three-day certification program, participants developed change management skills, learning to apply a research-based methodology and tools to projects to improve UVA's capacity for change.

18 Participants From
7 Administrative Areas and
4 Schools/Academic Units

- ★★★★★ 4.9/5 Strongly Agreed/Agreed Would Recommend to Colleagues
- ★★★★★ 4.5/5 Strongly Agreed/Agreed Can Apply to Work
- ★★★★★ 4.9/5 Highly Confident They Understand That Effective Change Management Improves Results

"**Training came at an opportune time** given a large initiative that I've been tasked with, and the nature of the initiative is highly dependent on people and change."

"Coming to the realization that we often implement new projects or processes with little emphasis on getting people through the stages of change. The **AKDAR model** really framed this well for me."



Prosci Change Management cohort

HOW WE SERVE

THE UVA COMMUNITY

- Coached and mentored others in organizational leadership and specific skills and tools
- Contributed as Cornerstone Leadership Program mentor, presenter, and Innovation Culture project co-sponsor with Darden Professor Ed Hess
- Delivered two *Finance Matters* podcasts: "Change Fatigue" and "What's in it for us? Practicing Change in Academia"
- Participated on search committees across Grounds
- Presented at the UVA Forward Conference
- Supported the higher education graduate program as a guest lecturer, mock interviewer, and doctoral intern sponsor

Committees:

- Data Governance Council
- Finance Strategic Transformation Steering Committee, Advisory Committee, and Selection Committee
- School of Medicine Be Smart Steering Committee
- Staff Senate
- Staff Senate Advisory Committee
- Ufirst Voice of the Customer and Strategic Operations Committees
- University Bicentennial Commission
- University Committee on Information Technology



BEYOND UVA

- Collaborated with Univ. of Washington and Univ. of Wisconsin
- Advised by other organizations: Ohio State, Wayne State, Northwestern, Arizona, UNC, Emory, National Institutes of Health, EnCompass LLC working with WHO, and First West Credit Union
- Featured in Prosci success story titled "UVA Elevates Project Portfolio Management with Change Management"
- Participated in Charlottesville Center for Nonprofit Excellence Leadership Circle

Presentations:

- "Ask Better Questions to Advance Organizational Change" – Northwestern Webinar
- "Asking Better Questions" – Network for Change and Continuous Innovation (NCCI) Change Management Community of Practice Webinar
- "Creating, Cultivating, and Growing a Community of Practice" – 2018 NCCI Annual Conference Presentation
- "Making Sense of Transformation in Higher Education: Is It Necessary? Is It Possible?" – 2018 NCCI Annual Conference Presentation
- "Storytelling for Change" – Cal State System (23 Campuses) Workshop



NCCI Committees:

- Advisory Committee
- Annual Conference Planning Committee
- Board of Directors
- Change Management Community of Practice
- Finance Committee
- Professional Development Committee



Organizational Excellence

Cultivating a Culture of Quality

Organizational Excellence is only possible through University-wide collaboration — functional area partnerships, faculty/staff stakeholder engagement, and school and unit-led contributions. OE program governance and guidance are provided by Executive Sponsors (EVP-COO Jennifer "J.J." Wagner Davis, EVP-Provost Tom Katsouleas/ M. Elizabeth "Liz" Magill, Curry School Dean Bob Pianta, and Sr. VP Colette Sheehy), and the Organizational Excellence Leadership Council (OELC).

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