

Human Resource Strategic Design Initiative



The talent of our workforce is one of our many distinguishing characteristics.
The quality of our human resource experience should mirror that same excellence.



Who?

The Academic Division and the Health System

Why?

- mass retirement of existing talent
- an increasingly competitive market for new talent
- the opportunity to improve the human resource experience
- systemic inefficiencies and redundancies

How you will benefit:

- a recruiting, hiring, and onboarding experience consistent with the reputation of the University
- improved satisfaction through seamless, consistent, high quality HR experiences
- proactive support and engagement from HR service partners and
- a reduction in overall HR-related costs gained through a more efficient operating model.

Phase 1

Design

September 2015 – June 2016

Phase 2

Implement

July 2016 – December 2017

Phase 3

Sustain

January 2018+



Project Contacts

Tamara Fleming ts3wx@virginia.edu
Heather Humphrey hh5ax@virginia.edu



The Center for Leadership Excellence was launched to foster a culture of excellence and achievement.

Cornerstone Plan, Pillar 5, Strategy 13:

The CLE encourages and enables leadership through learning & development programs tailored for all career levels.

Center Goals

- Advance a culture of leadership
- Increase participation in leadership development classes and programs
- Launch and enhance a Succession Development Program
- Provide more career development tools
- Assist the organization in optimizing its structure

Start Your Leadership Journey Today!

- Take a class
- Participate in group learning
- Use the career compass
- Come to an event or conference

Project Contacts

Tamara Fleming, ts3wx@virginia.edu, 4-5375
Leslie Andrus, l1a2u@virginia.edu, 3-3993
Carolyn Cullen, cc5ff@virginia.edu, 4-0247



UNIVERSITY of VIRGINIA

MANAGERIAL REPORTING PROJECT

DATA → *INFORMATION* → *INSIGHT*



I NEED...

Data **QUALITY & EFFICIENCY**

Robust **REPORTING** Tools

Common **DATA DEFINITIONS**
and Language

Strategic IT / Functional
PARTNERSHIPS

STREAMLINED
WORK PROCESSES

To be **HEARD**

STRATEGIES FOR
STAKEHOLDER
ENGAGEMENT

- Handwritten Thank You's
- Monthly Newsletter
- Across-Grounds Town Hall
- Stakeholder Roadshows
- Website

TO-DO LIST:

Data Quality
Decision Support System
Data Dictionary
Agile Product Development
Change Management
Stakeholder Engagement

<http://www.managerialreporting.virginia.edu>



WE OFFER...

Unit-Level **FINANCIAL**
REPORTING Web Interface

Reporting **TOOLSET**

Pan-University **DATA**
GOVERNANCE Structure

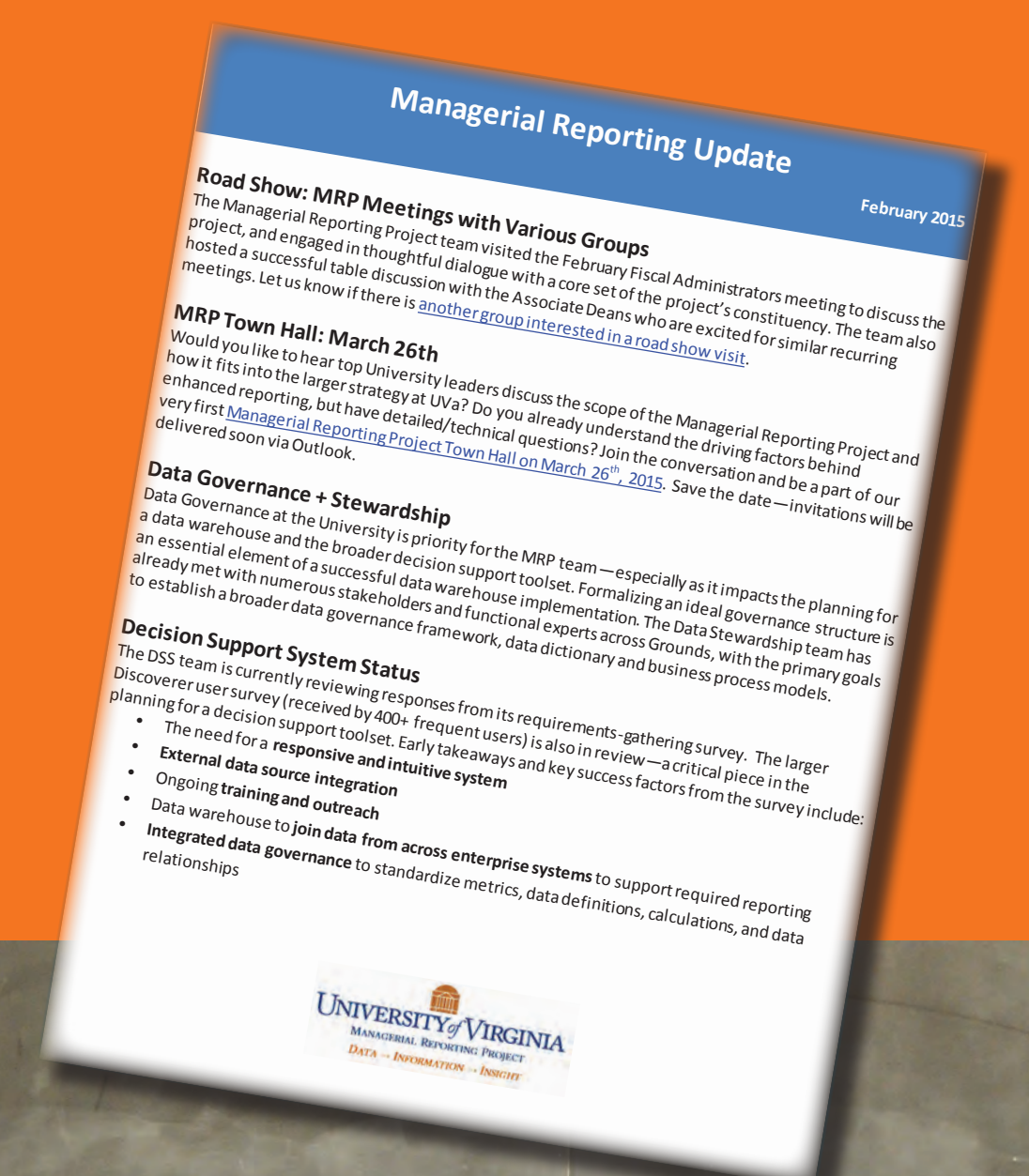
ORGANIZATIONAL
EXCELLENCE
Partnerships

TRAINING Sessions

CUSTOMER SERVICE

Stakeholder

Project Partner



MANAGERIAL REPORTING PROJECT

TOWN HALL





Opportunity for Improvement

Manual: The current process to approve and track grant proposals is a manual paper-based system.

Limited Data: Data collected is limited and often not detailed enough to provide useful reports.

Approvals often require personnel to drive across Grounds for multiple signatures.

Electronic Proposal

Electronic Proposal development.

“Turbo Tax” design provides questions to guide you through the process.

+ New Proposal

If you're ready to begin a proposal, fill out the form below and click the **Begin Proposal** button below.

Once you begin the proposal, you will be able to

- Fill out the Goldenrod form
- Complete your Certs
- Create your budget
- Upload supporting documents
- And finally, submit your proposal for approval

Principal Investigator Information

Contact Principal Investigator Is the Contact PI eligible to submit proposals?

Sean Agnew ☒ Yes ☐ No

Organization

31340 EN.Mat Sci/Engr Dept

Co-Principal Investigator(s)

Are there any Co-Principal Investigators for this Proposal?

☐ Yes ☒ No

Proposal Information

Proposal Type

☒ New ☐ Non-Competing Continuation

☐ Renewal ☐ Supplement

☐ Resubmission



ResearchUvA

The “key to the city” of research

The “key to the city” of research

A new system is on the horizon!
Support for research faculty and staff
to track their proposals and awards.

FAST FACTS:

“At a Glance” status of awards and proposals.

Warnings for:

End Date

$\$Deficit$

Burn Rate

Proposal Due

Reports Due

Fast Facts

Editing

Deficit

Burn Rate

Proposals Due

Reports

Award #

Award Name

End Date

GH14004

EN-MSE-Shipbuilding Steels

12/15/2014

Project #

Description

End Date

142654

EN-MSE Eddy Current Sensor Development for Sensitization Detection

1/15/2015

Start a new Proposal

Request an external subcontract be created or modified (SP-30)

Request a No-Cost Extension or some other action (SP-23)

See Funding Opportunities

Submit Technical/Progress Report

Active Awards

#

My Role

Name

Type

Status

Start Date

End Date

Sponsor

Contract Id

Direct

Indirect

GG11600

PI

EN-MSE-Dynamic Failure

G&C-Grant, Cost Reimb

ACTIVE

9/10/2012

3/9/2015

U.S. Dod - Army - Aro

W911NF-12-1-0455

\$175,469.00

\$71,631.00

SP23 | SP30

GH0513

PI

EN-MSE-Crystal Plasticity

G&C-Contract, Cost Reimb

ACTIVE

1/15/2012

3/31/2015

Babcock & Wilcox Technical Services Y-12, LLC

4300004098

\$238,722.00

\$101,278.00

SP23 | SP30

GA10959

PI

EN-MSE Designing Materials

G&C-Grant, Cost Reimb

ACTIVE

9/1/2012

8/31/2015

U.S. Nef - Directorate For Engineering

CMMI-1235259

\$202,605.00

\$86,757.00

SP23 | SP30

GG11738

PI

EN-MSE-UGRA-PMcQuade

G&C-Grant, Ext Pd Reimb

ACTIVE

6/1/2014

5/31/2015

Virginia Space Grant Consortium

VSGC FY2014-15-PaMcQuade

\$8,500.00

\$0.00

SP23 | SP30

Open Proposals

Proposal #

Title

Submit Date

Type

Status

77716

Effects of Environmental, Metallurgical & Physical Factors on Surface Chemistry, Pitting and SCC Beh

15/2011

New

Pending

78429

Hot Torsion Testing and Deformation Modeling of Rare Earth Element-Containing Magnesium Alloys

8/2/2011

New

Pending

79196

In-situ Measurement and Prediction of Intergranular Stress Corrosion Crack Initiation in Austenitic

10/27/2011

New

Pending

79325

World Materials Network: Collaborative Research: Multi-Scale Modeling and Characterization of Tiwini

11/11/2011

New

Pending

79927

Mitigation of Intergranular Stress Corrosion Crack Initiation in Austenitic Alloys

1/24/2012

New

Pending

In-Process Proposal Details

Test New proposal 11142014

Contact PI	Agnew, Sean R	
PI	Agnew, Sean R	Organization 31340 EN-Mat Sci/Engr Dept
Co-PIs	Durrer, Vonda	
Proposal Type	New	
Period of Performance	1/1/2015 - 12/31/2018	
Sponsor	Case Western Reserve University	
Sponsor Contact	Vonda	Sponsor Contact Phone 434
Due Date	12/5/2014 8:00 PM	
	12/5/2014 8:00 PM Eastern	

What do you want to do?

- Continue the **goldenrod**
- Continue the **PI certs**
- Start the **budget** for this proposal
- Upload **Proposal Document**
- Modify/Replace your **abstract**
- Edit Proposal Details
- Mark Proposal as ...

Proposal Status

Goldenrod Incomplete	Certification Incomplete	Budget Not Started	Proposal Document(s) Uploaded	Abstract Submitted	Submission Incomplete
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PROPOSAL STATUS: Tracks the progress of your proposal

System Includes:

- Imaging - electronic file management
- One Stop Shop - Research portal
- Faculty Dashboard - status “At a Glance”

Vonda Durrer, Office of Sponsored Programs, vd9k@Virginia.EDU
Lee Baszczewski, Organizational Excellence, slb3da@Virginia.EDU



“More time for research!”

Research Portal “One Stop Shop”

“One Stop Shop”

Single Portal link to internal and external systems such as:

Expense Reconciliations, Effort Reporting, IRBs, Conflict of Interest as well as Grants.gov, NIH, NSF, Dept. of Ed, and Altum Proposal Central.

Single Sign-on to internal secure systems.

Access to individual proposals and awards, and a current and pending support reporting feature.

Abstract keyword searches to facilitate collaboration

Faculty Dashboard

Track your Awards & Proposals

Home						
78429	Hot Torsion Testing and Deformation Modeling of Rare Earth Element-Containing Magnesium Alloys	8/22/2011	New	Pending		
79198	In-situ Measurement and Prediction of Intergranular Stress Corrosion Crack Initiation in Austenitic	10/27/2011	New	Pending		
79325	Multi Materials Network: Collaborative Research: Multi-Scale Modeling and Characterization of Twined	11/11/2012	New	Pending		
79607	Mitigation of Intergranular Stress Corrosion Crack Initiation in Austenitic Alloys	1/24/2012	New	Pending		
79968	Cutting Blade Wear Characteristics and Failure Materials Selection	1/27/2012	New	Pending		
80559	High-Performance Magnesium Alloys & Composites by Efficient Vapor Phase Processing	4/22/2014	New	Pending		
88106	Understanding Mechanisms Driving Grain Boundary Atomic Structure Effect on Texture and Microstructure Formation in Magnesium	9/30/2014	New	Pending		

Proposals in Process

#	My Role	Title	Sponsor	Type	Sponsor Due Date	Status
100019	PI	Test New proposal 11/14/2014	U.S. Agency for International Development	New	12/14/2014 5:00 PM	G C E S P A S
100022	PI	Test New proposal 11/14/2014	Cornell University	New	12/5/2014 8:00 PM	G C E S P A S

Inactive Awards

#	Name	Status	Start Date	End Date	Sponsor	Contract Id
G113828	EN-MSE eddy current	ACTIVE	1/14/2013	8/15/2014	Luna Innovations, Inc.	2736-NNV-251A/A
G141034	EN-MSE-DMREF Grantees	ACTIVE	8/15/2013	7/31/2014	U.S. Natl. Directorate for Engineering	CMMI-132521/1

Track your Personnel & Budget

Home / Research Idea 7004 / Proposal 100002 / Budget

Proposal #100002 Test New proposal 11142014 - DUE: 12/5/2014 5:00 PM

Sponsor

Cases Western Reserve University

Sponsor Contact Phone

434

Contact PI

Agnese, Sean R

Period of Performance

3/1/2015 - 12/31/2018

Organization

31340 EN Mat Sci/Eng Dept

Sponsor Due Date

12/5/2014 8:00 PM

What do you want to do?

< Previous Year

Year: 2015 ▾

> Next Year

+ Add New

- Delete Year

▢ See the budget summary

▣ Export the budget for this year

✓ Mark the budget as complete

▾ Research Type: Instruction

Off Grounds? ☐

F&A Rate Type: Base ▾

F&A Rate: %

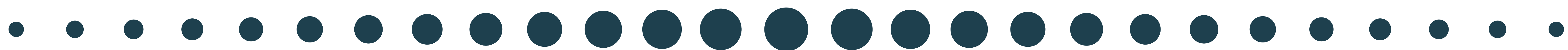
Personnel

Personnel		Settings					Salary				Calendar Year				
Personnel Identity	Exclude From F&A Base	Project Role	Appointment	Key	Credited	Cost Share	Student	Salary	Cap	Increase Rate	Increase Component	After Increase	Months	Pct	Salary M
Vander Durka (cdk)	<input type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		\$124148	0	0.00%	0.00%	\$ 0.00	\$ 0.00	0	0.00%
1	0		0	0	1	0	0	\$ 124148.00	\$ 0.00	0.00%		\$ 0.00	\$ 0.00	0.00	0.00%
1	0		0	0	1	0	0	\$ 124148.00	\$ 0.00	0.00%		\$ 0.00	\$ 0.00	0.00	0.00%

Other Direct Costs

Year 1: 2015						
Category	Subcategory	Exclude From F&A Base	Planned Expenditure	F&A Component	Budget Amount	Total Budget Amount

Strategic Sourcing Initiative



Procurement & Supplier Diversity Services

STRATEGIC SOURCING:

The practice of **analyzing spend** and **leveraging volume** in order to gain maximum **savings and service** for the University

RESULTS TO DATE:

OFFICE
SUPPLIES

8-10%
Annually

INBOUND
FREIGHT

35%
Annually

TRAVEL
BOOKING

2%
Annually

EXPENSE
MGMT.

Efficiency
Gains

GIFT
CARDS

1%
Annually

CATERING

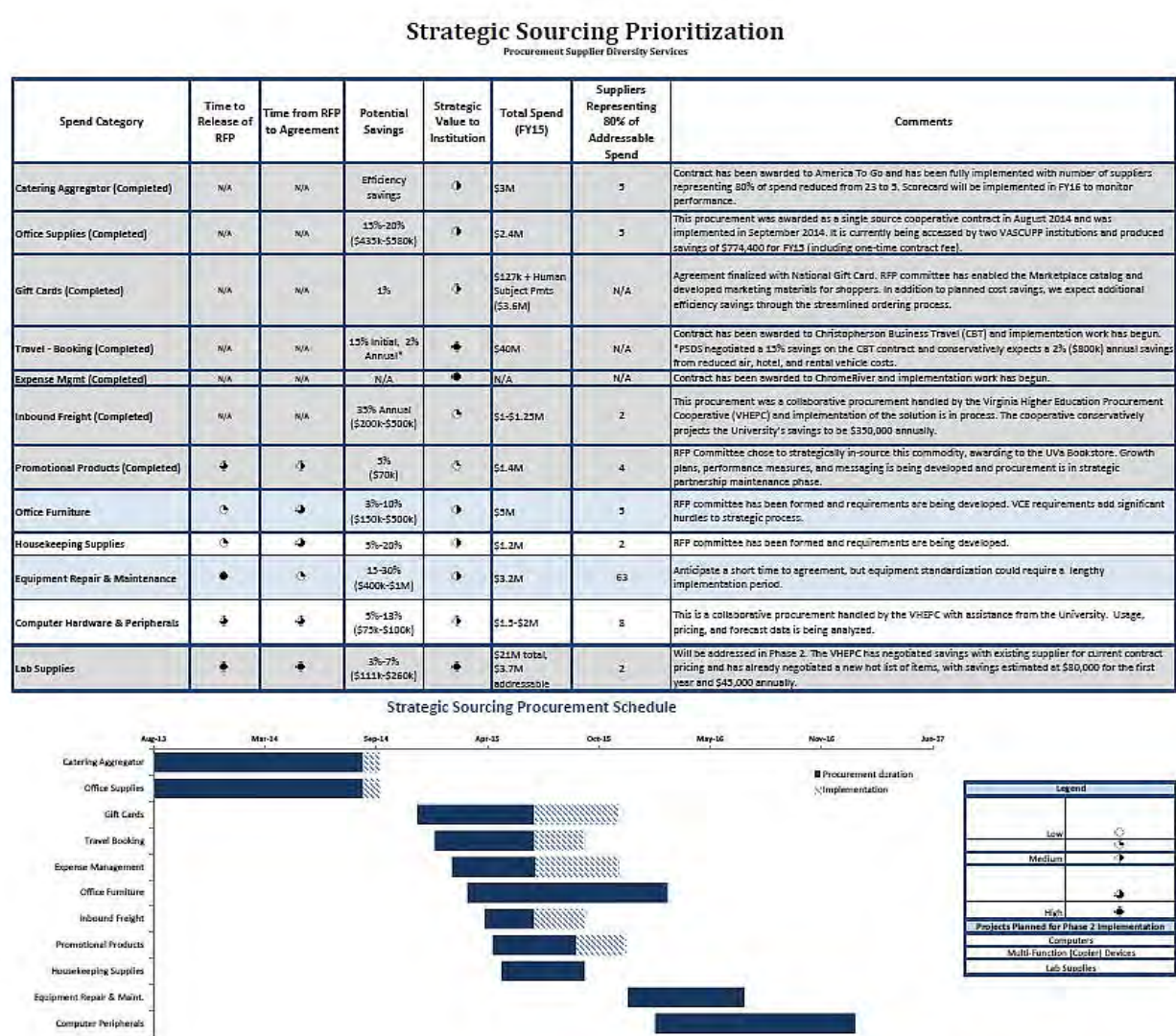
Efficiency
Gains

PROMO
PRODUCTS

5%
Annually

MGR'L
REPORTING

\$1.7
Million



FOR MORE INFORMATION:



Take a copy (or two!) of our handout



Visit <http://www.procurement.virginia.edu/>

Travel and Expense

Redesign and Implementation

Improving the Travel and Expense Experience

Implementing Policies, Procedures and Systems that Align and Simplify the Travel and Expense Process

CHRISTOPHERSON

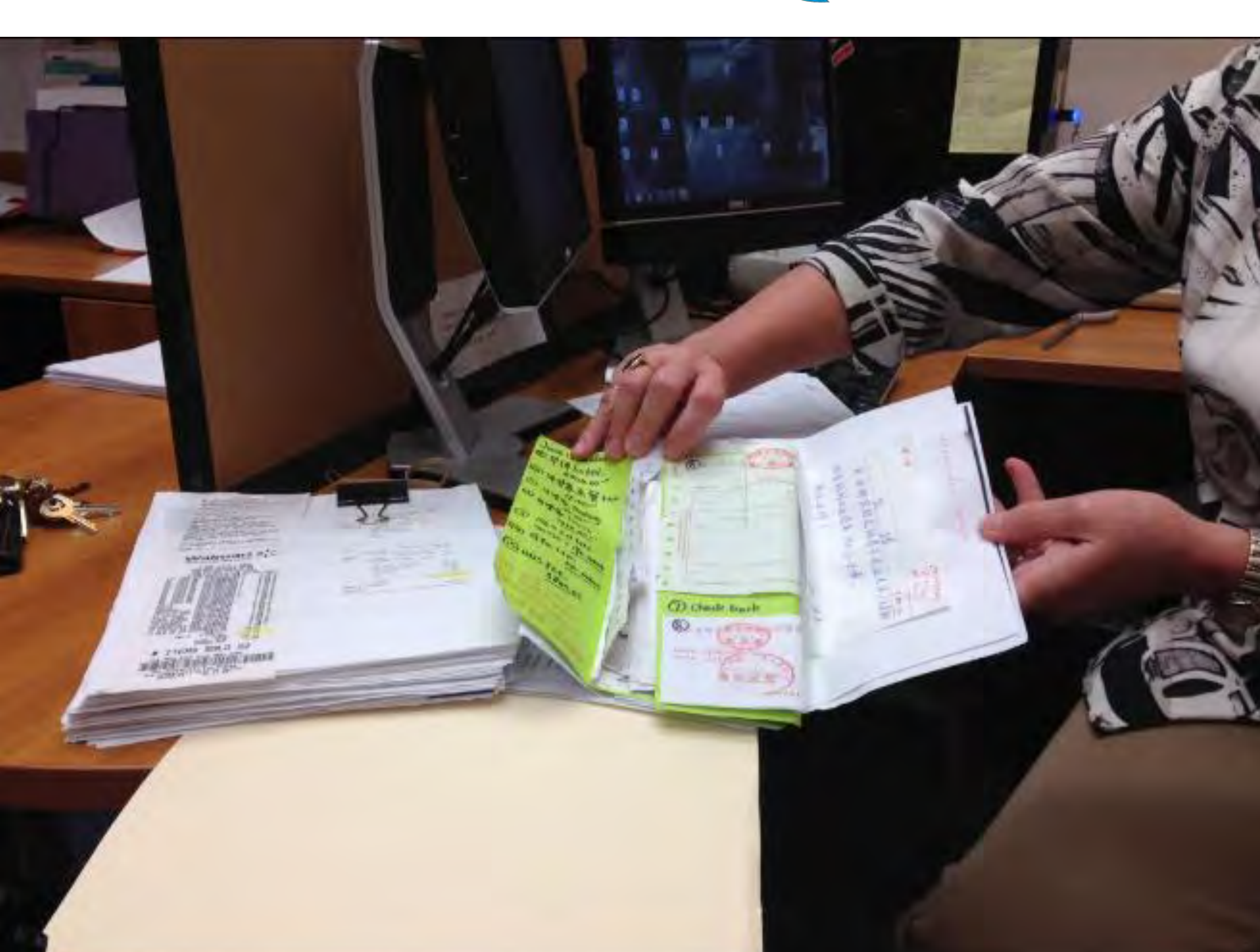
B U S I N E S S T R A V E L



Concur®



CHROMERIVER



Our project has two phases:

Travel - to redesign a disparate travel booking process and provide travelers with a tool that makes it easy to book their own travel

Expense - to simplify policies making it easy for employees to do the right thing and to implement an expense management tool that eases the burden of expense report creation and Pcard reconciliation

Project Goals

Streamline travel booking and expense management

Enhance Duty of Care

Enhance Compliance with Export Controls

Better air, hotel and rental car pricing

Automate Expense Entry, Approvals and Policy Checking

The Numbers

\$40M total travel expenditures
23,000 trip reimbursements
5,700 travelers
25,000 non-travel reimbursements
\$85 Processing Cost
16% Error Rate
100% Manual

Project Contacts

Dolores Hildebrand, djh2c@virginia.edu

Sue Clements, sbc5s@virginia.edu

UVA Gift Processing Services (GPS)

"Making It Easy to Give to UVA!"

COMING MARCH 2016:

An Enhanced Way to Process Gifts at UVA!

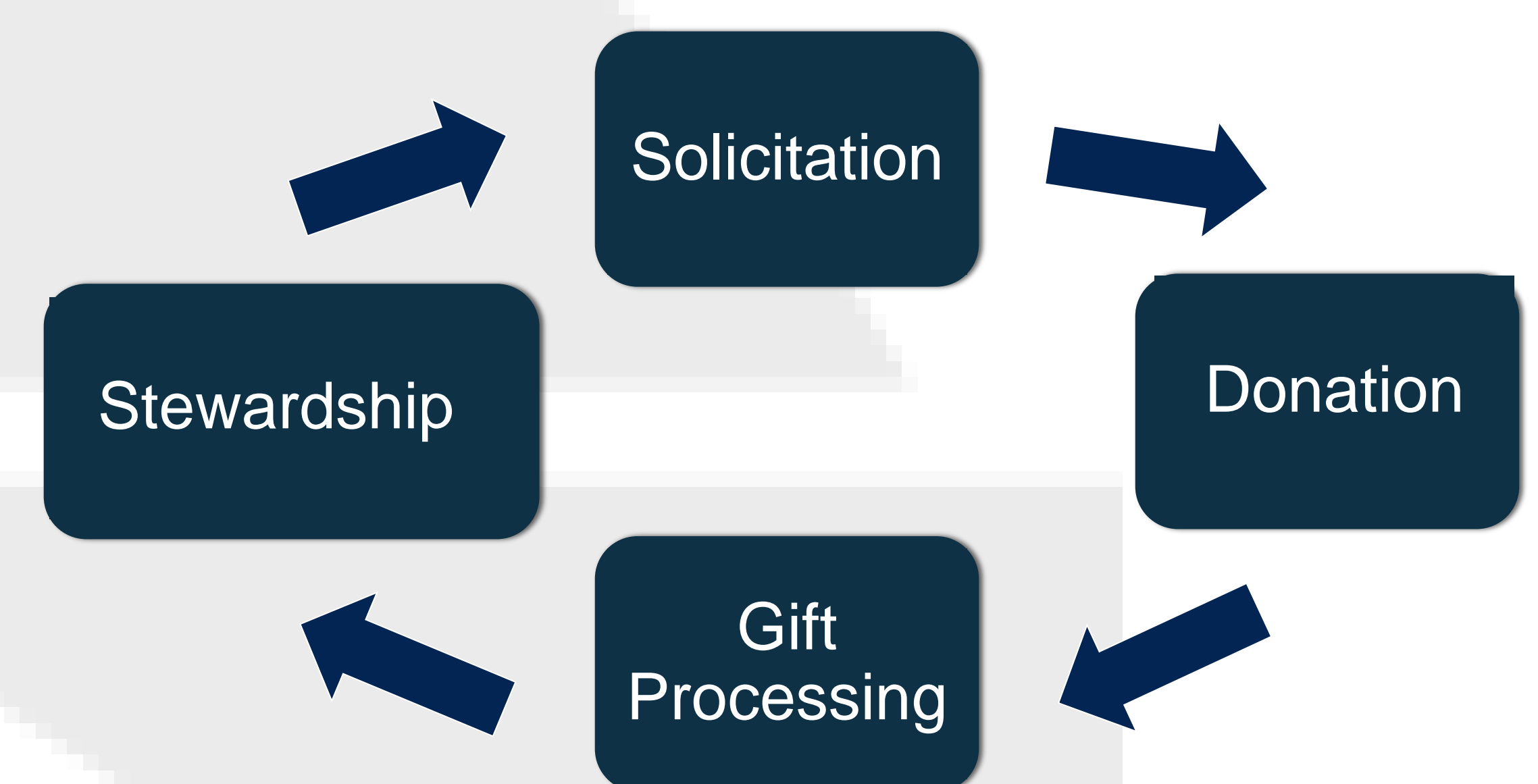
- Centralized Gift Processing Services Center
- Serving the University, its Foundations and the UVA Community
- Provided by the UVA Alumni Association and Housed at Alumni Hall

What is Gift Processing?

The accurate deposit and recording of donors' gifts and pledges.

Why is it Important to the University?

- Critical component of the donor cycle.
- Provides responsiveness to donor intent.
- Supports the Cornerstone Plan to enhance organizational excellence and philanthropy.



How Big Is It?

UVA Gifts by the Numbers

12%

Annual operational funding provided by philanthropy and endowment distribution

19

Entities authorized by the Board of Visitors to receive gifts on behalf of the University, including the Advancement office and 18 foundations

7

Number of shops processing gifts for UVA and its related foundations

208,365

Gift and pledge transactions processed in FY2014

Gift Processing Services

Built on 4 Pillars of Excellence

Accuracy • Productivity • Timeliness • Customer Service

Alumni Assoc. Managing Director for GPS, **Margaret Anderson** mem9t@virginia.edu
Project Manager, **Phil Porter** pdp2qt@virginia.edu

IT SECURITY

RESOURCES FOR RESEARCH

Evaluate the impact of U.S. government IT security standards and develop solutions to enable and support the research mission.

The U.S. government is applying IT security standards, e.g., **NIST SP 800-171** and **FISMA**, to certain types of data that result from or are necessary for the conduct of academic research. Elements of these standards are incompatible with UVA's IT infrastructure and are currently addressed on a case-by-case basis which is both time consuming and expensive for the individual project.

PROJECT GOALS

Understand UVA's present **status, obligations** and **risks**

Develop appropriate **metrics** and **internal controls**

Demonstrate service and flexibility in meeting the **needs of investigators**

Make recommendations to guide decision making, assist with prioritization of activities, develop costing models, and identify possible funding source.

SUMMARY

In support of enterprise-wide research growth at U.Va., as set forth in **The Cornerstone Plan**, a coordinated, systematic approach is necessary to evaluate the impact and requirements of recent **IT security standards** promulgated by the U.S. government and pervading the higher education research environment and to **develop solutions that fit the needs of individual investigators**.

PROJECT CONTACTS

Ron Hutchins, **rrh8z@virginia.edu**

Elizabeth Adams, **eha3w@virginia.edu**

Kelly Hochstetler, **kjh5e@virginia.edu**



EMAIL CONSOLIDATION

Maintaining two separate central email platforms—the CMS and the Exchange Service—requires University resources that can be saved by consolidating on a single system; and a single, enterprise-level system improves calendar sharing and meeting planning. The first phase of this project will consolidate central email systems, by migrating CMS users to Exchange, and integrate calendars between central (ITS) and Medical Center (HSTS) systems.

Increase Productivity

Increase in University productivity associated with meeting/event scheduling.

Eliminate Inefficiencies

Near-term elimination of the costs and inefficiencies associated with the administration of multiple central email systems.

Add Efficiencies Over Long-Term

Longer-term plan for potential additional efficiencies, communication and collaboration, and cost savings associated with institutional communication and collaboration:

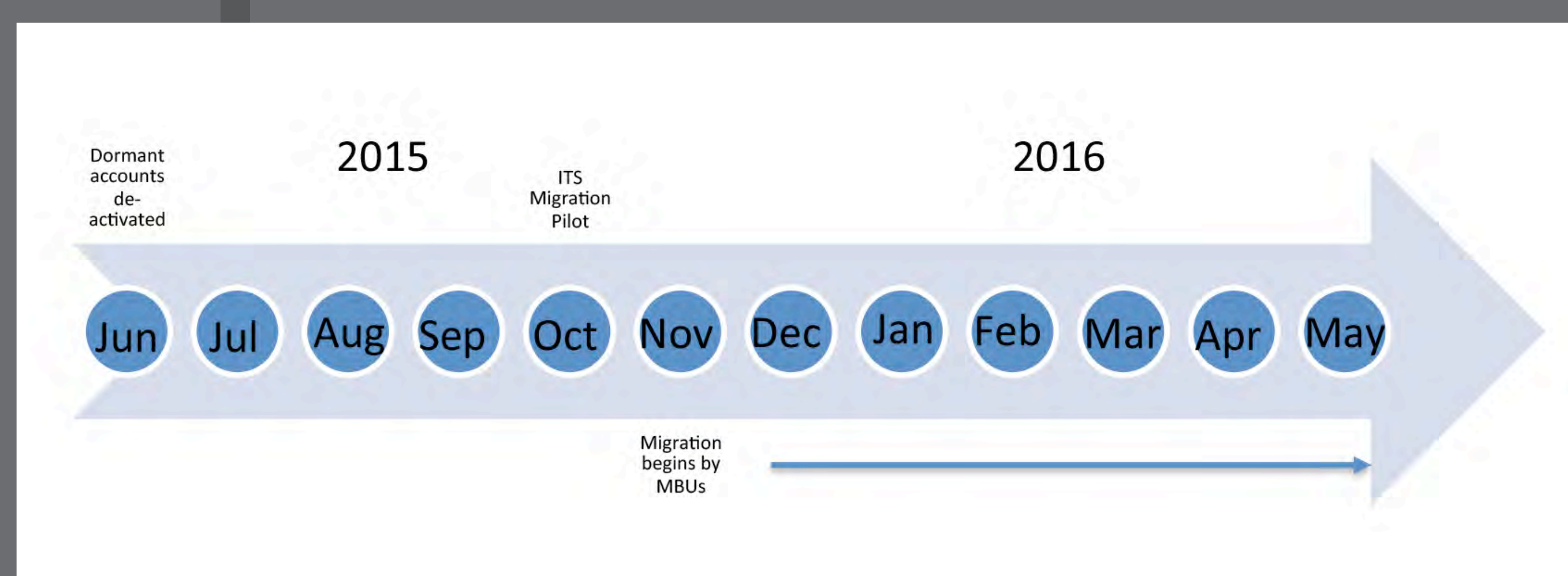
- Possible additional consolidation of other school email systems
- Possible move from on-premise Exchange to a cloud-based system
- Possible migration of student email

Goal 1

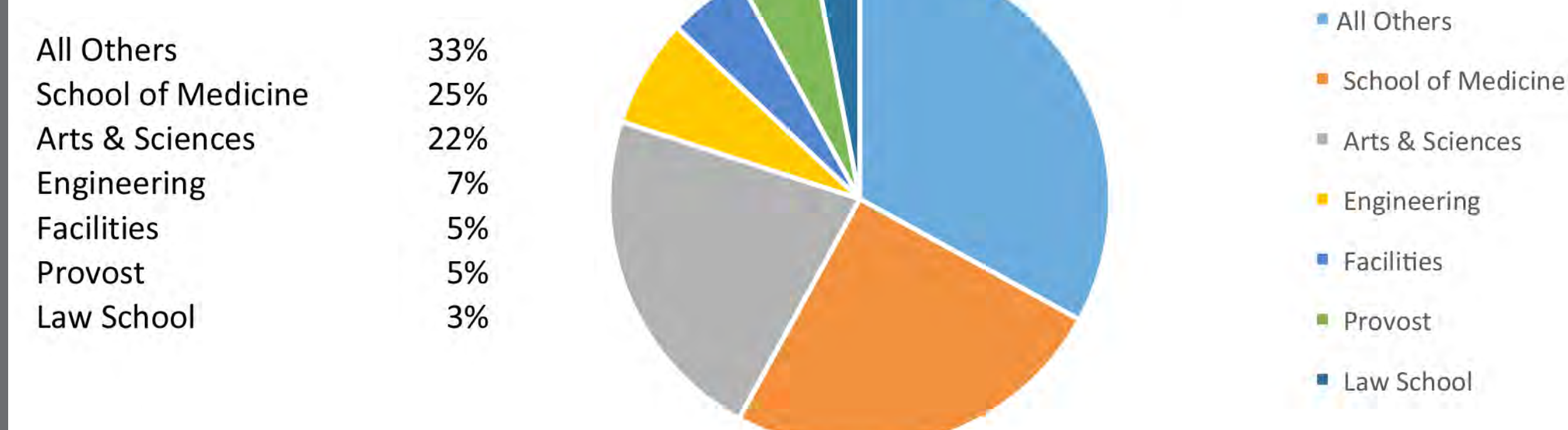
Goal 2

Goal 3

its.virginia.edu/email/cms/migration



CMS Accounts to be Migrated by Department



Project Contacts
 Dana German, dba4c@virginia.edu
 Christy Joseph, cj9r@virginia.edu
 Keith Donnelly, krd2b@virginia.edu

SERVER/DATA CENTER CENTRALIZATION



The University has many servers running a variety of applications and they are distributed in many locations across Grounds.



- This distributed model does not always leverage economies of scale where they could exist
- It is difficult to ensure the appropriate infrastructure and security requirements are being met
- Server and data center centralization will improve service levels, reduce costs and reduce data security risks

Education & Awareness

Education and awareness of Academic Division units regarding centralized services and the benefits they offer (cooling, monitoring, security, generator/backup, etc.).

Centralized Location

Migration of disparate data center/server locations across the University into a centralized, secure location, where appropriate.

Reduced Cost & Risk

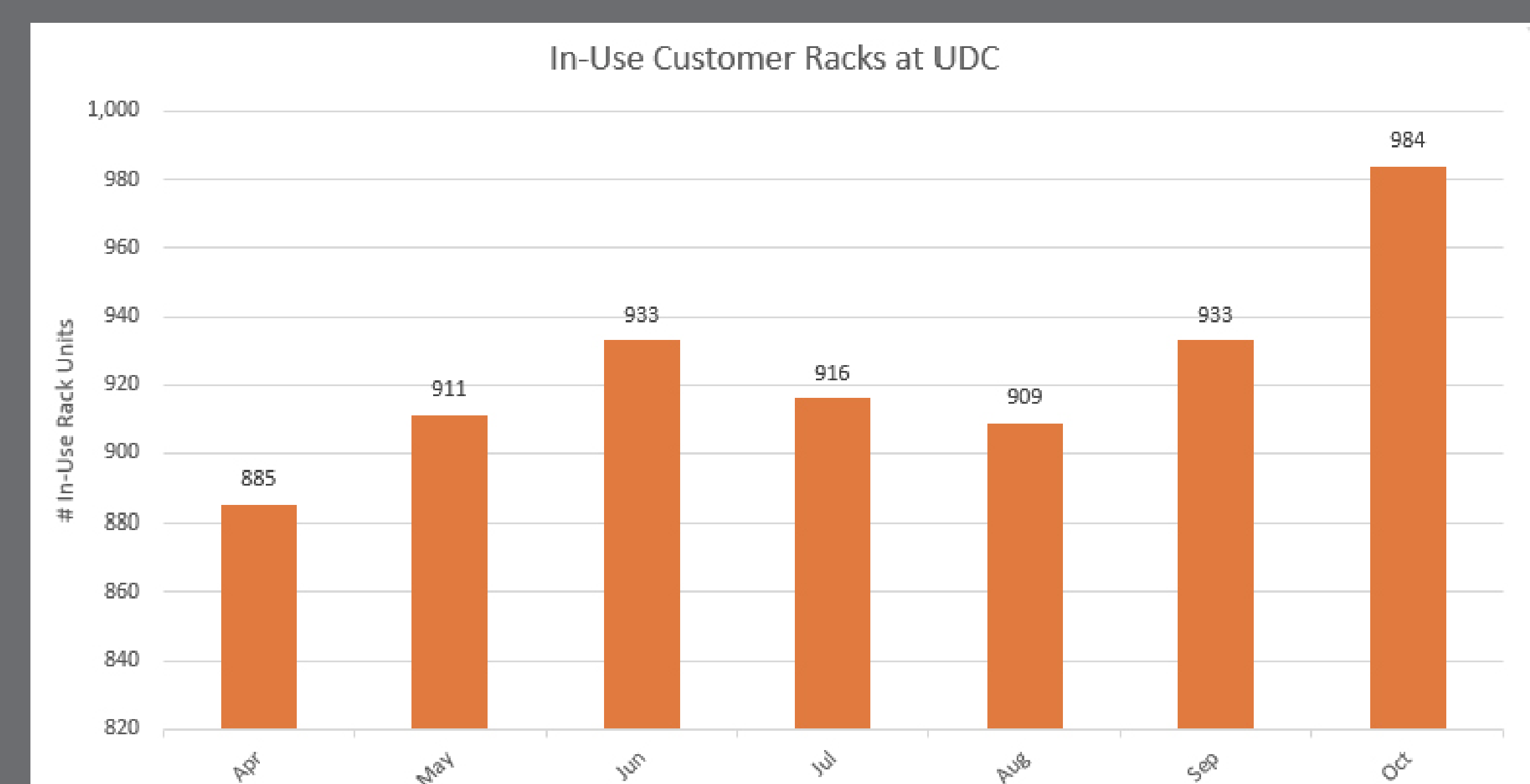
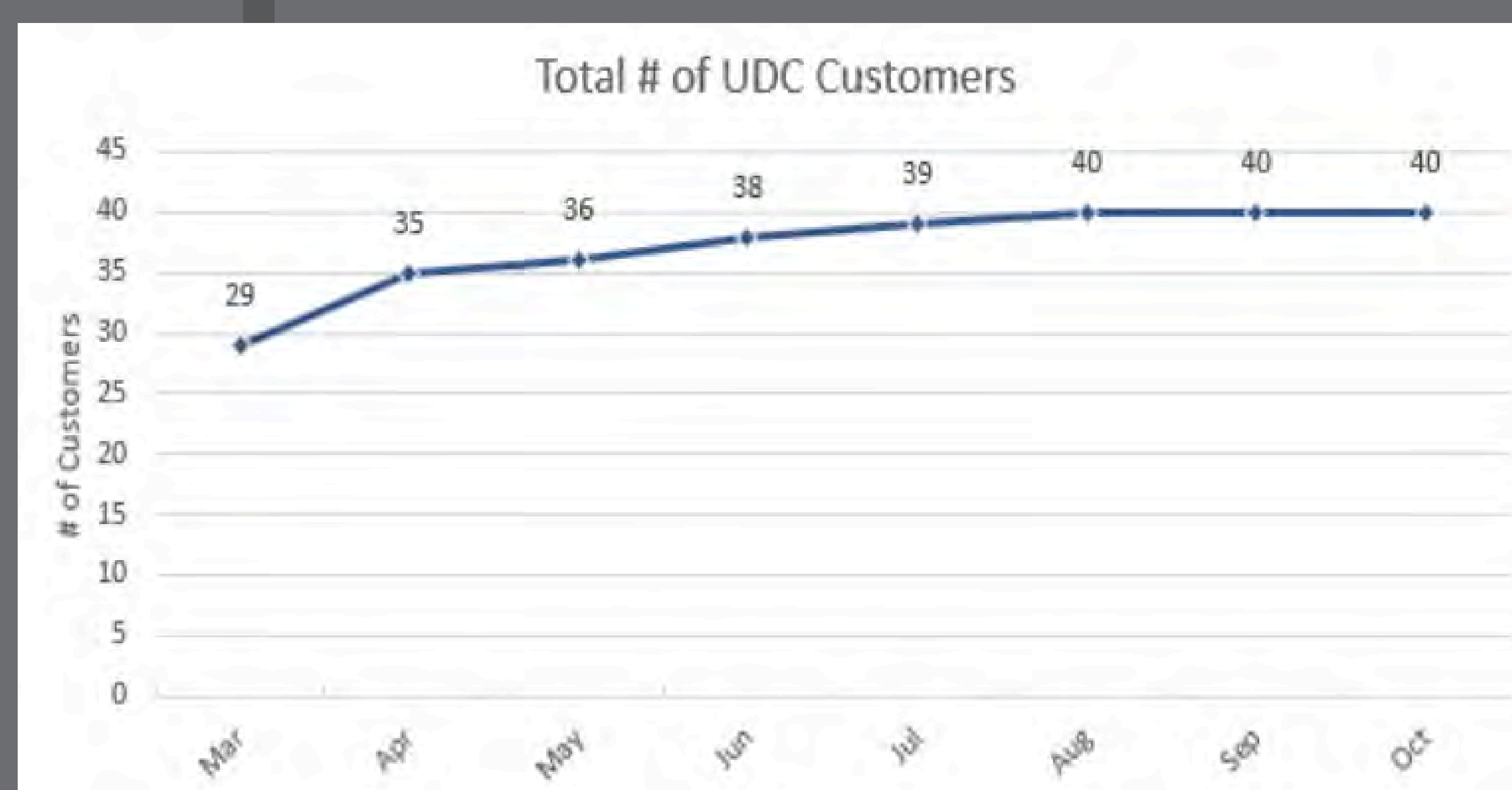
Reduction in cost and risk to the University by consolidating services centrally at scale.

Goal 1

Goal 2

Goal 3

its.virginia.edu/hosting



Project Contacts

Mike Higginbotham, mh5jb@virginia.edu
Dana German, dba4c@virginia.edu

THE CORNERSTONE PLAN

A STRATEGIC PLAN FOR THE ACADEMIC DIVISION

“Just as the 1817 laying of the University’s cornerstone signified a defining moment in higher education, the Cornerstone Plan is defining the University’s future as we prepare for its third century as one of the nation’s greatest universities.”

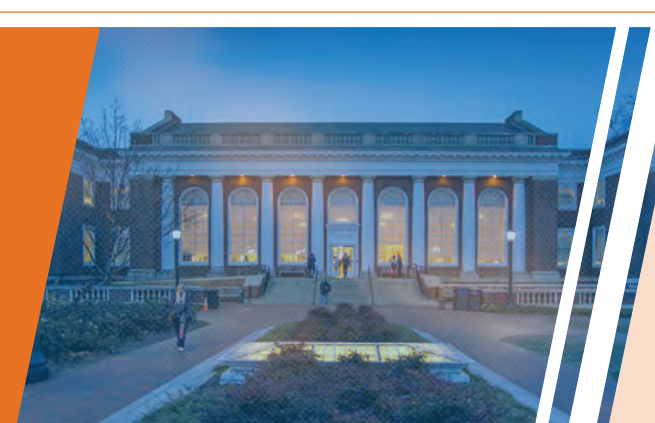
Teresa A. Sullivan
President

Pillar I



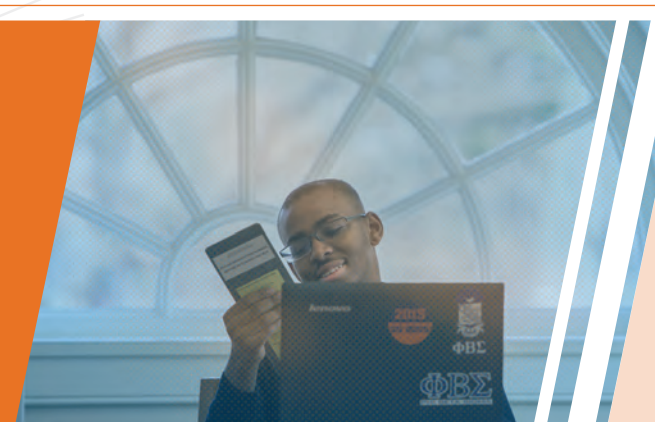
EXTEND AND STRENGTHEN THE UNIVERSITY’S
DISTINCTIVE RESIDENTIAL CULTURE

Pillar II



STRENGTHEN THE UNIVERSITY’S CAPACITY TO ADVANCE KNOWLEDGE
AND SERVE THE COMMONWEALTH, THE NATION, AND THE WORLD
THROUGH RESEARCH, SCHOLARSHIP, CREATIVE ARTS, AND INNOVATION

Pillar III



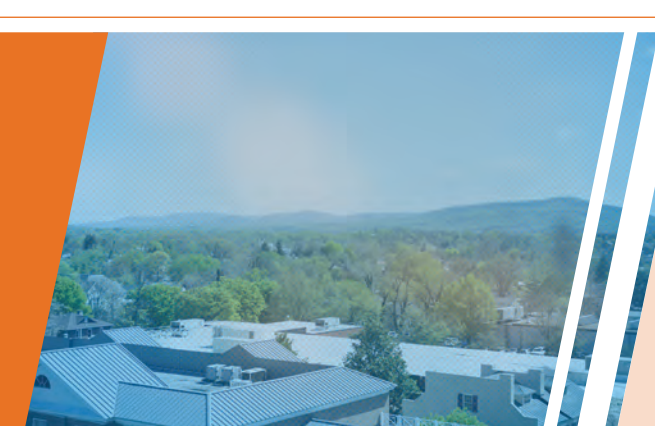
PROVIDE EDUCATIONAL EXPERIENCES THAT DELIVER
NEW LEVELS OF STUDENT ENGAGEMENT

Pillar IV



ASSEMBLE AND SUPPORT A DISTINGUISHING FACULTY

Pillar V



STEWARD RESOURCES TO PROMOTE
ACADEMIC EXCELLENCE AND AFFORDABLE ACCESS

LEARN MORE TODAY

For a complete update on our progress fulfilling the Cornerstone Plan’s bold objectives and tactics, visit us online at the link below.

planning.virginia.edu



UNIVERSITY
of VIRGINIA

PROGRAM HIGHLIGHTS

UNIVERSITY of VIRGINIA ORGANIZATIONAL EXCELLENCE

“an institutional value and formal program”

PORTFOLIO HIGHLIGHTS

EXECUTIVE SPONSORS

set **strategy** and direction
accountable for **vision**
champion initiatives

LEADERSHIP COUNCIL

execute direction, scope of **portfolio**
accountable for **results**
foster **culture** of continuous improvement

OE PROGRAM OFFICE

INITIATIVES / PROJECTS

targeted efforts
OE **partners** with academic and administrative areas

COMMUNITY NETWORK

individuals across UVA
connect, collaborate, contribute

GUIDING PRINCIPLES

Right for the Mission

Right Structure

Right People/Right Job

Right Process

Right Technology

Right for Faculty, Staff,

Students

CORNERSTONE STRATEGIC PLAN

Steward The University's Resources
To Promote Academic Excellence
And Affordable Access

Organizational Excellence

Enable the achievement of institutional strategic goals and priorities—excellence in education, research, and scholarship.

Leverage institutional core strengths and distinctions through resource alignment and optimization.

Research UVA

A holistic review of the research administration process from pre-proposal to closeout and implementation of faculty dashboards.

Travel & Expense Management

Streamlining processes and increasing ease of use from booking travel to reimbursements.

Internal Communications

Developing an institutional approach to communicate effectively with the University community about strategy and operations-related information.

Strategic Sourcing

Analyzing institutional spend to implement a new supply structure, and identify opportunities for strategic pricing and high-level customer service (e.g. office supplies).

Quality CORE Network

An open Network for individuals across UVA
Connect and collaborate to share ideas and best practices
Contribute to UVA-wide and unit-level improvements
Develop skills and knowledge



organizationalexcellence.virginia.edu





RECENT SESSIONS

- The Power of Persuasion
- The Lean Management Mindset
- Customer Service
- Professional Social Networks
- Engage Others for Innovation
- Design Thinking
- Liberating Structures to Unleash A Culture of Innovation
- The Feedback Challenge: How to give and receive powerful feedback
- Appreciative Inquiry
- Communication Plans
- High Performing Learning Orgs
- Overview and Update on OE projects
- Spotlight on UVA Best Practices
- OE Project Alliance SHOWCASE

SUGGEST A TOPIC!!

SESSION FEEDBACK

“I can see this working, or developing, in our department, and in areas of UVa.”

“Interesting presentation and very useful for all facets of life.”

“Awesome tools that can be put into practice...”

“Great relevant subject matter that can easily be applied in the workplace. Thanks!”

“Fantastic! Loved the session!”

ORGANIZATIONALEXCELLENCE/VIRGINIA.EDU/QUALITY-CORE-NETWORK



SPOTLIGHT ON EXCELLENCE

An Ongoing Peer Recognition Program

Nominate a colleague for this recognition!



Shine the spotlight.
Nominate a Person of Excellence.



Has someone you work with demonstrated a high-level of **quality**, recently implemented a noticeable **improvement**, or leveraged a creative **innovation**?

Have you observed a colleague deliver **excellent service** to faculty, staff, and/or students?

RECENT HONOREES

Jim Bowen
Diane Cole
Robin Fisher
Pat Hartsook
Young Kim

Laura Mellusi
Kathy Roy
Kim Turner
Jessie Wood
Andrew Yeung

**NOMINATE
TODAY**



[ORGANIZATIONALEXCELLENCE.VIRGINIA.EDU/SPOTLIGHT-EXCELLENCE](https://organizationalexcellence.virginia.edu/spotlight-excellence)

NCCI

Network for Change and Continuous Innovation



ANNUAL CONFERENCE 'UNE NOUVELLE VISION' Montréal, Canada

Keynotes
General Sessions
Continuous Improvement
Process Improvement
Strategic Planning
Project Management
Change Management

NCCI Leverages Excellence

Through innovative educational leadership, NCCI observes, studies, shares and advocates for institutional improvement.

NCCI Collaborates

NCCI provides opportunities to share best practices in academic and administrative processes and systems from dozens of universities, associations and corporations—which help you improve services, communications, partnerships, leadership, and learning!

NCCI Networks

Meet other professionals involved in continuous improvement at the Annual Conference and other NCCI events throughout the year.

Membership Benefits

Annual Conference
Networking
Webinars
Workshops
Newsletter
Awards and Recognition
Communities of Practice

University of Wisconsin

"I came away with some methods that I think are going to really help groups generate creative ideas and come to agreements more quickly."

Maury Cotter

Director of Strategic Planning and Quality Improvement

Cornell University

"We have turned to our NCCI colleagues on numerous occasions to learn what they are doing. Reaching out and learning from others enables us to gather information and implement new ideas much more quickly and effectively because we build off the successes of our colleagues."

Kathryn Burkgren

Director, Organizational Development for Faculty & Staff

www.ncci-cu.org

UVA is an institutional member of NCCI. All faculty and staff have access to the association's valuable member benefits.

Center for Leadership Excellence: The Basics

The Cornerstone of Leadership at the University of Virginia

About Us

The Center for Leadership Excellence (CLE) is dedicated to advancing a culture of leadership at the University. We believe in shared leadership – that all employees can and should lead from their positions by sharing their knowledge, expertise, and passion for UVA with their colleagues. We provide programs tailored for employees at every level of career development.

Organization Leadership Services

Feedback Assessment Tools for Leaders – Our consultants will work with you to identify the best assessment tool for your goals. The assessment will help you gather valuable feedback from your direct reports, your manager, and your peers. We will help you identify and leverage your strengths, discover areas for improvement, and design a customized development plan.

Individual Coaching – Based on your needs and goals, we will help match you with a qualified coach. Coaches become a trusted advisor, a sounding board for your strategies, needs and interests. They will help you challenge old beliefs and inspire you toward new ones.

Team Building Workshops – Customized team building workshops are designed for your **team's specific** needs and challenges. The following are example workshop themes: Crucial Conversations®, Effective Communication, Change Management, Multicultural Fluency, Team Building Retreat, and Strategic Planning.

Organization Development (OD) is a deliberately planned, manager-led effort to increase effectiveness and efficiency within a school or unit. We can help you review your structure, roles, and systems to make recommendations for increased efficiency and effectiveness. We can also assist with change management planning and implementation. In addition, we can help your unit develop a mission, vision, and strategic plan.

Develop Your Leadership Skills

Leading as an Individual – Leading as an Individual provides you with opportunities to develop skills that will enable you to influence and share knowledge and expertise with fellow University colleagues. Leading as an Individual focuses on developing yourself as a leader, a person, and a professional. Expand your knowledge and skills and enrich your professional and personal life through our broad selection of classes and other developmental opportunities. Examples include:

Exceptional Assistants' Network: a network of more than 400 administrative and service support employees - focus on professional development, networking, and community service.

Leadership Preparation: designed for employees who are developing their leadership skills for a future position.

Leading as a Manager – As a manager, you can have a significant impact on the organization's culture, direction, and success, as well as on your **employees' lives and careers**. The most successful managers

are those who make it a priority to develop their employees. The CLE has tools and resources to help both you and your employees continue career growth. Examples include:

Leadership Essentials: designed for current supervisors of individual contributors.

Leadership Practices: designed to develop the skills of more experienced leaders who have two or more organizational levels reporting to them, as well as of professional individual contributors who have a broad scope of responsibility.

Leadership Strategies: designed to develop the skills of those who serve as operating unit Directors, lead leaders, or have responsibility for work that spans the entire university community.

Career Development

We offer classes and workshops designed for individual development opportunities, such as Wired for Happiness, Where is Your Career Compass Leading you, and The Art of Interviewing.

The CLE also developed the Career Development Compass to communicate developmental activities across Grounds. These activities are available by job sub-family and are based on the UVa Job Structure. They are divided into five main categories: on-the-job experiences, events/classes, professional organizations, educational, and independent activities. Select activities and tailor development to your needs based on skills, interests, and career goals.

Succession Development

UVa has launched a formal pilot succession development program. The participants will receive customized training, development and individual mentoring from senior leaders on Grounds, spend time with executive leadership, and present a pan-University project. While participation in the program does not guarantee promotion or advancement, it will prepare employees for possible future leadership roles, as well as offer opportunities for personal development. **We are finding tomorrow's leaders among today's.**

Role of the Manager

The CLE's goal is to help all employees recognize, develop, and fulfill their leadership potential. Those who lead others in a formal capacity have a significant amount of influence on creating this culture of leadership. The CLE provides customized reviews of a department's **organizational structure** and assists in determining the effectiveness of current reporting relationships. These reviews ensure that individuals in the role of a manager have not only the skills and aptitude they need to be successful, but also a desire to lead others and a commitment to advancing the culture of leadership for all employees.

Want to Know More?

Visit our website at www.virginia.edu/leadershipexcellence for more information or email leadership@virginia.edu to be matched with a Learning and Development Specialist today.

Past Accomplishments

- Established the project governance structure, resourcing needs, and multi-year planning
- Delivered University Financial Model (UFM) reporting toolset and reporting
- Data process improvements
 - Internal service provider transaction automation
- Completed As-is process analysis
- Requirements gathering for reporting environment

Recent Accomplishments

- Established data governance framework
- Finalized key vendor agreements (Qlik, Informatica and Data Cookbook)
- Delivered enhanced budget balance available and revenue report

Currently Working On

- Initial data warehouse design and build out of Qlik toolset
- Analysis of enterprise wide data sources:
 - Enables build out of first data model
 - Provides understanding of key foundational links between currently standalone datasets
- First reporting pilot with associated data model for expenditures
- Adding fund source to monthly UFM reporting

Future Deliverables

- Additional reporting subject areas to include:
 - Integrated operating statement including additional insights into UFM reporting
 - Inclusion of "person details" with sources and expenditures of funds
 - Longitudinal reporting of programs, student success, etc.
 - Increased visibility of enterprise-wide data (examples include, but may not be limited to, facilities, space, procurement, travel)

By ~Fiscal End 2016

Periodic Incremental
Releases Spanning
~FY17 - ~FY19

How can we support UVa's Research Goals?

Grow Annual Research Awards From \$300M to \$500M

*Focus on Right Technology,
Right Process and the Right People*

TECHNOLOGY – Research UVa

Continue to align technology to the needs of Research Admin.

Phase 1: Faculty Portal, Imaging of Proposals/Awards May '15

Phase 2: Visible Award Status, Processing Que Jan. '16

Phase 3: Award Modifications (SP23, SP30) July '16

** Continued Phases as required*

PROCESS IMPROVEMENTS

Present - 2016

Focus on the Right Processes for efficiency and effectiveness

- Subrecipients & Outgoing Subawards process
- Award Management - Invoicing and Reporting
- Developing appropriate performance measures & reports

Right People with Right Skills

Present - 2016

- Build strong partnerships
- Increase specialists in Award Management
- Establish Communities of Practice for School RAs and Fiscal Administrators

Project Contacts

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Lee Baszczewski, slb3da@virginia.edu

Contact us for a
demonstration
of Research_UVa

Ensures the timely acquisition of goods and services at the best value for the University



Provides prompt payment of all non-payroll expenditures



Manages the University's P-Card program

UVA PROCUREMENT & SUPPLIER DIVERSITY SERVICES



Maintains and optimizes the University's e-commerce system



Ensures that the University does business with Small, Woman-, and Minority-Owned (SWaM) enterprises



Handles travel, expense, and petty cash reimbursements



KEY FACTS—FY15



POs & CONTRACTS

9,875 POs (Central)

www.procurement.virginia.edu/pagecontracts



ACCOUNTS PAYABLE

130,018 Invoices Processed

www.procurement.virginia.edu/pagebuypay



UVA MARKETPLACE

53.4% Purchases from Catalogs

www.procurement.virginia.edu/pagemarketplaceproject



PURCHASING CARD

107,424 Transactions

www.procurement.virginia.edu/pageusingpcard



SUPPLIER DIVERSITY

40.4% Total SWaM

www.procurement.virginia.edu/pagediversity



TRAVEL & EXPENSE

23,599 Reimbursements

www.procurement.virginia.edu/pagetravelbasics

UVA PROCUREMENT & SUPPLIER DIVERSITY SERVICES




Make our Contracts Page your first stop when making a purchase!

Audio-Visual	Food/Food Equipment	Furniture/Design
Information Technology	Lab Equip/Supplies/Services	Maintenance/Materials
Office Supplies	Printing/Copying/Mailing/Book	Services
Specialty	Travel/Relocation	

FOR MORE INFO, VISIT:
www.procurement.virginia.edu

HELPFUL LINKS

- **Goods & Services Procurement Guide:** www.procurement.virginia.edu/pageprocguidev2
- **Invoice Lookup for Departments:** www.procurement.virginia.edu/pageinvoicelookup
- **Staff Contact Information:** www.procurement.virginia.edu/pagestaff
- **UVa Spend Dashboard:** www.procurement.virginia.edu/pagespenddashboard
- **Travel and Expense Redesign Information:** www.procurement.virginia.edu/pagetemredesign
- **Strategic Sourcing:** www.procurement.virginia.edu/pagestrategicsourcing

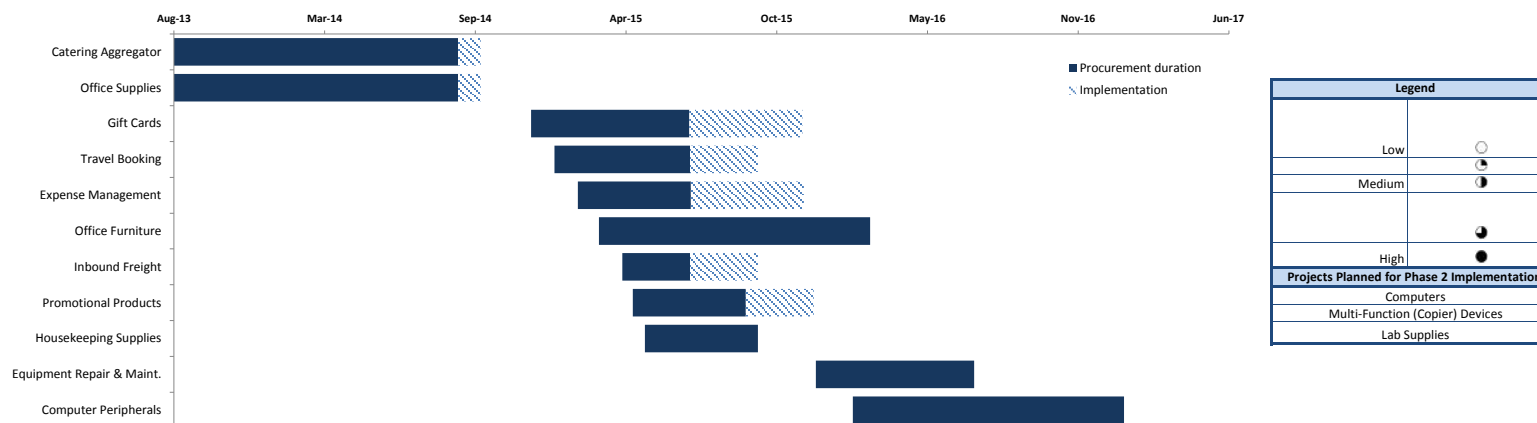
 (434) 924-4212

Strategic Sourcing Prioritization

Procurement and Supplier Diversity Services

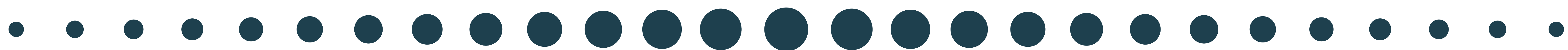
Spend Category	Time to Release of RFP	Time from RFP to Agreement	Potential Savings	Strategic Value to Institution	Total Spend (FY15)	Suppliers Representing 80% of Addressable Spend	Comments
Catering Aggregator (Completed)	N/A	N/A	Efficiency savings	●	\$3M	5	Contract has been awarded to America To Go and has been fully implemented with number of suppliers representing 80% of spend reduced from 23 to 5. Scorecard will be implemented in FY16 to monitor performance.
Office Supplies (Completed)	N/A	N/A	15%-20% (\$435k-\$580k)	●	\$2.4M	5	This procurement was awarded as a single source cooperative contract in August 2014 and was implemented in September 2014. It is currently being accessed by two VASCUPP institutions and produced savings of \$774,400 for FY15 (including one-time contract fee).
Gift Cards (Completed)	N/A	N/A	1%	●	\$127k + Human Subject Pmts (\$3.6M)	N/A	Agreement finalized with National Gift Card. RFP committee has enabled the Marketplace catalog and developed and delivered the communications plan. In addition to planned cost savings, we expect additional efficiency savings through the streamlined ordering process.
Travel - Booking (Completed)	N/A	N/A	15% Initial, 2% Annual*	●	\$40M	N/A	Contract has been awarded to Christopherson Business Travel (CBT) and implementation work has begun. *PSDS negotiated a 15% savings on the CBT contract and conservatively expects a 2% (\$800k) annual savings from reduced air, hotel, and rental vehicle costs.
Expense Mgmt (Completed)	N/A	N/A	N/A	●	N/A	N/A	Contract has been awarded to ChromeRiver and implementation work has begun.
Inbound Freight (Completed)	N/A	N/A	35% Annual (\$200k-\$500k)	●	\$1-\$1.25M	2	This procurement was a collaborative procurement handled by the Virginia Higher Education Procurement Cooperative (VHEPC). Implementation of the solution and communications began in October. The cooperative conservatively projects the University's savings to be \$350,000 annually.
Promotional Products (Completed)	●	●	5% (\$70k)	●	\$1.4M	4	RFP Committee chose to strategically in-source this commodity, awarding to the Uva Bookstore. Growth plans, performance measures, and messaging are being developed in support of this strategic partnership.
Office Furniture	●	●	3%-10% (\$150k-\$500k)	●	\$5M	5	RFP committee has been formed and requirements are being developed. VCE requirements add significant hurdles to strategic process.
Housekeeping Supplies	●	●	5%-20%	●	\$1.2M	2	RFP committee has been formed and requirements are being developed.
Equipment Repair & Maintenance	●	●	15-30% (\$400k-\$1M)	●	\$3.2M	63	Anticipate a short time to agreement, but equipment standardization could require a lengthy implementation period. This project will become part of the Phase 2 research category strategy which includes lab supplies.
Computer Hardware & Peripherals	●	●	5%-13% (\$75k-\$100k)	●	\$1.5-\$2M	8	This is a collaborative procurement handled by the VHEPC with assistance from the University. Usage, pricing, and forecast data is being analyzed.
Lab Supplies	●	●	3%-7% (\$111k-\$260k)	●	\$21M total, \$3.7M addressable	2	Will be addressed in Phase 2. The VHEPC has negotiated savings with existing supplier for current contract pricing and has already negotiated a new hot list of items, with savings estimated at \$80,000 for the first year and \$45,000 annually.

Strategic Sourcing Procurement Schedule



For more information about our methodology, and for details about each strategic procurement, please visit our website at:
<http://www.procurement.virginia.edu/pagestrategicsourcing>

Strategic Sourcing Initiative



Procurement & Supplier Diversity Services

STRATEGIC SOURCING:

The practice of **analyzing spend** and **leveraging volume** in order to gain maximum **savings and service** for the University

RESULTS TO DATE:

OFFICE
SUPPLIES

8-10%
Annually

INBOUND
FREIGHT

35%
Annually

TRAVEL
BOOKING

2%
Annually

EXPENSE
MGMT.

Efficiency
Gains

GIFT
CARDS

1%
Annually

CATERING

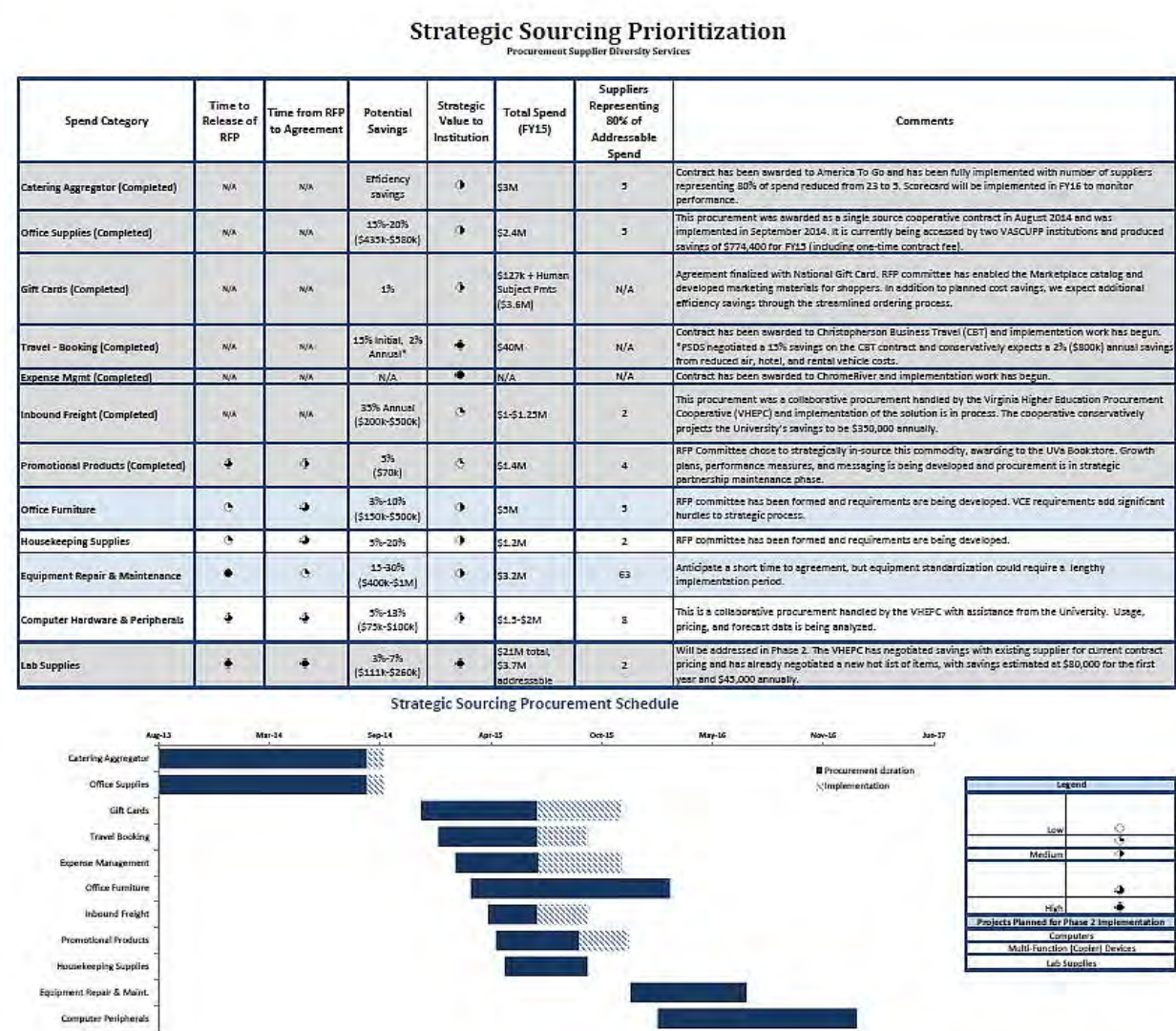
Efficiency
Gains

PROMO
PRODUCTS

5%
Annually

MGR'L
REPORTING

\$1.7
Million



FOR MORE INFORMATION:



Take a copy (or two!) of our handout



Visit <http://www.procurement.virginia.edu/>

EMAIL CONSOLIDATION PROJECT



Tentative CMS Migration Schedule

Migration Completion Week	Business Unit/School	Status
2015		
Week of December 7	Arts & Sciences, Center for Global Health, Colonnade Club, Curry, Finance, JPJ, Osher Lifelong Learning Institute, SW Va Higher Ed Ctr, Semester at Sea	
Week of December 14	Athletics, Library, President's Office, Research, Student Affairs	
2016		
Week of January 4	Development, HR, Law School, Nursing, Wise	
Week of January 11	Arts & Sciences, EVP-COO, Facilities Management	
Week of January 25	Provost's Office, SCPS	
Week of February 1	Arts & Sciences, Engineering	
Week of February 15	Arts & Sciences, Engineering	
Week of February 22	Arts & Sciences, Business Operations, Unclaimed (as of 11/15/15) Generics w/Unknown Dept	
Week of March 7	Arts & Sciences, Highway Research Council, Management and Budget, UVa Physician's Group	
Week of March 14	Arts & Sciences, Special migration of accounts > 4.5 GB (as of 11/15/15)	
Week of March 28	Architecture, Arts & Sciences, Batten, Computation Intensive, Darden, McIntire	
Week of April 4	School of Medicine	
Week of April 18	School of Medicine	
Week of April 25	School of Medicine	
Week of May 9	Health System, All Others	

NOTE: Arts & Sciences users should consult with their LSPs for more specific schedule information.

its.virginia.edu/email/cms/migration/

Project Contacts

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**INFORMATION
TECHNOLOGY
SERVICES**

SERVER/DATA CENTER CENTRALIZATION

ITS Hosting

its.virginia.edu/hosting

Service Offerings

ITS: your trusted partner for hosting

ITS offers a wide array of hosting-related services to the University community.

Whether you need free rack space at the data center, a component service—an SQL database to store lab data, a UVA Box account, a few hours of server consulting—or an end-to-end solution with dedicated servers and premium system support, ITS is your on-Grounds provider for robust, competitively-priced options. Our dedicated staff understand how IT fits with your academic mission.



Rack Space

*Got your own hardware? House it
in our Data Center*



Servers

*Need a virtual or physical server?
Contract with us*



Storage

*Get flexible, cost-effective storage
for your critical information*



Websites

*Find options for UVA Web
development & hosting*



Databases

*Organize your mission data in
secure SQL databases*



Backups

*Let ITS help protect your critical
data and system info*



Support

*Learn about support levels and
pricing for your servers*



Questions?

*Don't see what you're looking for?
Contact us!*



Consulting

*Get help from expert ITS solution
partners*

Project Contacts

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Dana German, dba4c@virginia.edu

INFORMATION
TECHNOLOGY
SERVICES

THE CORNERSTONE PLAN

A STRATEGIC PLAN FOR THE ACADEMIC DIVISION

“Just as the 1817 laying of the University’s cornerstone signified a defining moment in higher education, the Cornerstone Plan is defining the University’s future as we prepare for its third century as one of the nation’s greatest universities.”

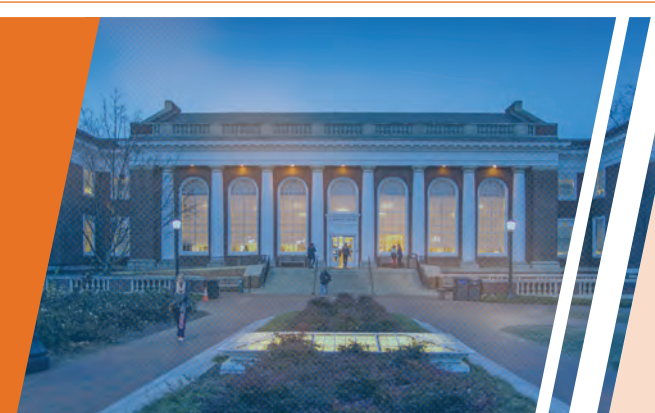
Teresa A. Sullivan
President

Pillar I



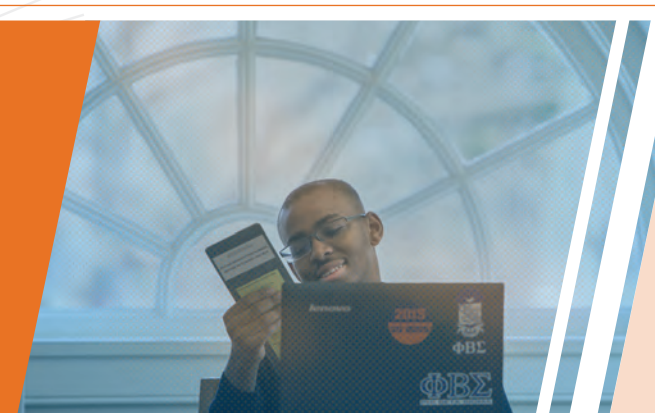
EXTEND AND STRENGTHEN THE UNIVERSITY’S
DISTINCTIVE RESIDENTIAL CULTURE

Pillar II



STRENGTHEN THE UNIVERSITY’S CAPACITY TO ADVANCE KNOWLEDGE
AND SERVE THE COMMONWEALTH, THE NATION, AND THE WORLD
THROUGH RESEARCH, SCHOLARSHIP, CREATIVE ARTS, AND INNOVATION

Pillar III



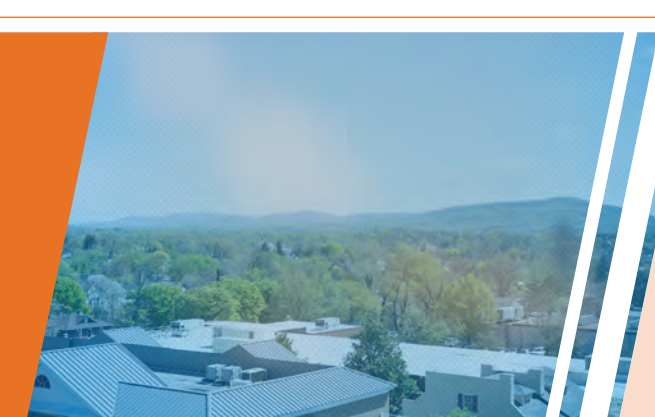
PROVIDE EDUCATIONAL EXPERIENCES THAT DELIVER
NEW LEVELS OF STUDENT ENGAGEMENT

Pillar IV



ASSEMBLE AND SUPPORT A DISTINGUISHING FACULTY

Pillar V



STEWARD RESOURCES TO PROMOTE
ACADEMIC EXCELLENCE AND AFFORDABLE ACCESS

LEARN MORE TODAY

For a complete update on our progress fulfilling the Cornerstone Plan’s bold objectives and tactics, visit us online at the link below.

planning.virginia.edu



UNIVERSITY
of VIRGINIA

Organizational Excellence

Portfolio “At-a-Glance”

	PROJECTS	OE PARTNERS
OE LEADERSHIP SPONSORED INITIATIVES	HR Strategic Design Initiative Create a long-term strategic vision and high-performing, efficient model for HR that aligns with and enables the University’s goals and priorities.	Human Resources, Office of the Provost, Health System, External Consultants
	Research Administration/Research UVA Conduct a review of the research administration process from pre-proposal to closeout and implement an electronic portal, PI dashboard and award tracking.	Office of Sponsored Programs/ VP for Research
	Travel and Expense Management Redesign Streamline processes and increase ease of use from booking travel to reimbursements.	Procurement
	Server/Data Center Centralization Consolidate server/data centers to optimize resources and reduce costs.	Information Technology Services
	Email Consolidation Consolidate to one email system at the University in order to facilitate and improve ease of communication.	Information Technology Services
OTHER INSTITUTIONAL INITIATIVES	Quality CORE Network Deliver quality and improvement programs to the University community.	Organizational Excellence
	Consultation and Facilitation Provide organizational design and development services across the University.	Organizational Excellence & Other On-Grounds Partners
	OE Project Alliance Align projects across the University and leverage opportunities to coordinate with other leaders of the Organizational Excellence family.	Organizational Excellence
	Bacharach Leadership Group (BLG) Training Facilitate a multi-session program focused on leading change and innovation. Pragmatic skills to develop an agenda, gain support, and move it forward to execution.	Organizational Excellence
	Administrative Unit Review Conduct a comprehensive review that includes a self-study and an on-site visit by an external committee to foster administrative excellence and promote continuous improvement in support of the University’s mission and priorities.	Organizational Excellence
	Managerial Reporting Improving access to financial and operational data for enhanced decision-making.	Finance
	Gift Processing Creating a Center of Excellence where all University gifts will be processed accurately, and in a timely and efficient manner.	Treasury Management
	Center for Leadership Excellence Developing leadership capacity at all levels.	Human Resources
COMPLETED	Prioritized Multi-Year Strategic Sourcing (SS) Plan / (SS) Office Supplies	Procurement
	Internal Communications Assessment	Central Offices, Schools, Units
	Benchmarking of Administrative Services (IT, HR, Procurement, Finance, Research, Student Services)	Central Offices, Schools, Units
	Statewide Conference on Innovation and Collaboration	Office of the VP for Mgmt. & Budget
	Participation in Great Colleges to Work For Program	Cross-functional work group across Grounds

ORGANIZATIONAL EXCELLENCE STRATEGY MAP

CORNERSTONE STRATEGIC PLAN, PILLAR 5, STRATEGY 14

MISSION

“Create a culture of excellence to enable core mission and strategic priorities”

VISION

“Excellence everywhere”

PRINCIPLES

Academic/Administrative
Collaboration and
Partnerships

Data-Driven &
Results- Oriented

Stewardship
of Resources

Strategic,
Long-Term Impact

Deliver effective and efficient processes and services

Align with
Mission &
Respond to
Needs of the
Community

Transform
Service
Delivery

Redesign &
Streamline
Processes

Provide
Consultative
Services to
Schools
& Units

Facilitate
Quality
Network for
Professional
Development

Initiate
Spotlight on
Excellence
Recognition
Program

Share Best
Practices
& Scale
Solutions

Promote
Ideation &
Experiment

Cultivate a culture of quality

Organizational Development Services

Portfolio and Project Management • Organizational Redesign/Structure • Strategic Planning
Process Improvement • Benchmarking • Metrics Development • Stakeholder Engagement & Feedback • Facilitation
Communications Planning • Change Management • Change Leadership Development • Coach & Mentor

Demonstrate Value

Increase Quality
& Performance

Reduce Complexity & Administrative Burden
(simplify, consolidate, automate, standardize)

Increase Stakeholder Satisfaction
& Perceived Value

Spotlight on Excellence

Has someone you work with demonstrated a high-level of quality, recently implemented a noticeable improvement, or leveraged a creative innovation at the University?

Have you observed a colleague deliver excellent service to faculty, staff and/or students?

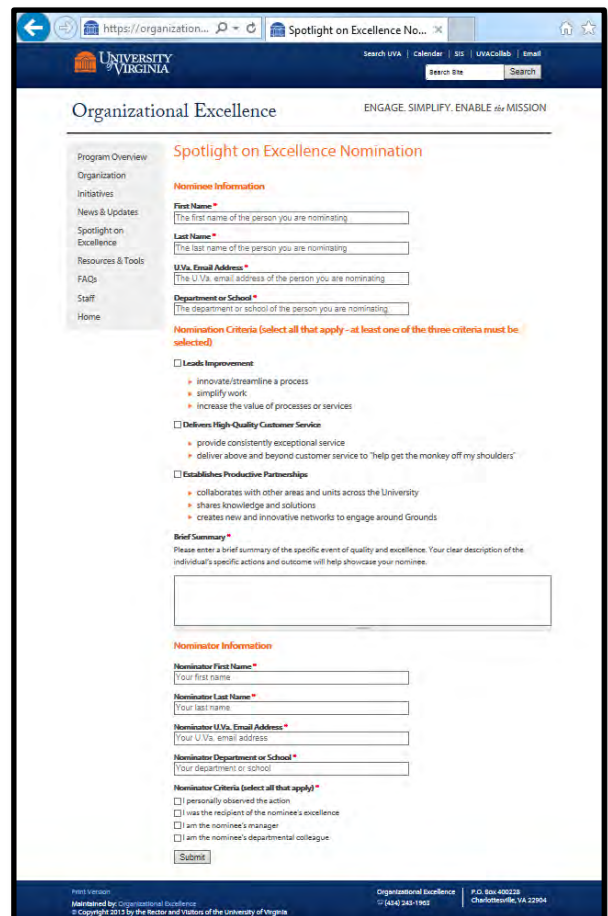
The Office of Organizational Excellence (OE) wants *you* to recognize individuals who contribute to an overall culture of quality at U.Va. This is an ongoing monthly recognition program for those exhibiting the principles of OE in their work, because everyone has an opportunity to advance excellence!

Criteria: *(one or more)*

- ✓ **Leads Improvement**
- ✓ **Delivers High-Quality Customer Service**
- ✓ **Establishes Productive Partnerships**

[Nominate a person of excellence!](#)

Individuals selected will receive a token of appreciation from University leadership. Plus, each quarter, one lucky winner (and their original nominator) will be randomly selected for a gift certificate.



**Nominate
Today!**