Organizational Excellence
Initiative Summary

Title: Rollout of Benchmarking Data to Schools and Major Units

Executive Sponsor(s):
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Problem Statement

The Benchmarking Study of Administrative Services was completed in spring 2014. The data have been applied to shape and inform a number of pan-institutional OE initiatives, such as Research UVA, strategic sourcing of office supplies, and travel and expense management redesign. The data was also shared with function sponsors for their application with function-specific initiatives. A benchmarking subgroup of the Organizational Excellence Leadership Council guided additional analysis and discussed further utility of the data at the school/unit level and institutional level.

The initial focus to apply findings from the Benchmark Study was pan-institutional; however, there were also insights and observations that applied to schools and units. The Rollout initiative seeks to interpret and apply those insights at a more detailed level.

Project Overview and Scope: Rollout of Benchmarking Data

In October and November, 2014, Organizational Excellence staff partnered with the OELC benchmarking subgroup and several schools to gather input to refine more granular analysis and presentation of information.

The OELC Benchmarking Subgroup reviewed a set of potential reports, including comparative, normalized analysis by school. After reviewing, the subcommittee advised OE staff to solicit feedback from several school associate deans about how to distill and present the school-specific data and results in such a way that it is useful at the school-level. The subcommittee also supported sharing raw data with the schools for further manipulation and analysis.

OE staff reviewed the standard reports with three associate deans (Curry, Engineering, and McIntire) to generally assess the value and utility and collect suggestions for further improvement, and conducted a more in-depth discussion of raw and detailed data with a single school (Curry) to identify any other data or analyses for local benefit.

Project Goals / Objectives and Timeline

1. **Develop School/Unit Reports (Jan-Feb)**
   Develop school and unit specific reports and analysis from the Benchmark study and incorporate managerial structure data from the Center for Leadership Excellence. This information would be packaged in a report set and include normalized, comparative information and analysis.

2. **Share and Discuss report sets in-person (Feb-March)**
   Present report sets in three sessions to three populations:
   a. undergraduate schools and library
   b. professional schools
   c. Major Service Units (Facilities, Business Operations, and Athletics).
   These sessions would also include the function owners and leads.

3. **Interpret and Apply (March-April)**
   In addition to report sets, send raw data to each school and unit along with a summary of emerging themes, observations from the function owners, and questions for consideration.

4. **Schools And Units Shared Discussion**
   Invite schools and units to have a shared discussion of findings, emerging themes, questions, and potential collaborative strategies

Sample Reports (illustrative purposes only)

The following is an illustration of the kind of report detail schools/units can expect from the Benchmarking Data Rollout initiative. Reports will be school/unit-specific, and will leverage graphs and charts to visualize data.