

Organizational Excellence

CULTIVATING A CULTURE OF QUALITY



2017-18 ANNUAL REPORT

Organizational Excellence (OE), the University's comprehensive quality program, promotes and partners for a high-performance, service-oriented, and continuous improvement culture to support and advance core mission activities and priorities. This report highlights major activities and accomplishments.

275+

Initiatives Led By Schools and Units:

- New joint-school degree program
- Strategic sourcing of student travel
- Automated budget adjustment process
- Increased parent and student mobile tech use
- Improved transparency with revised cash flow
- Integrated undergraduate admissions system
- Consolidated work across departments
- Shifted from paper to online proposal submissions
- Volunteers to reallocate employee time
- Student center for student support offices
- Shelf registration for external debt issuance
- Administrative ticketing to monitor type and completion time
- Improved space use and project timelines
- Data analysis to align courses offerings with student demand

EXCELLENCE ACROSS GROUNDS

Gift and endowment files converted from paper to electronic • Student services reorganization to serve all grads and undergrads • Reduced energy consumption and enhanced efficiency • Shared positions between Student Health and Medical Center • Cloud-based software for collaboration and version control • Improved transportation services and fuel efficiency • Modernized classroom technologies for effectiveness • Mixed-media campaign for employee health benefit choices • Internal marketing support across departments • Long-range event planning to strategically source supplies • Reduced meeting time and reallocated to serve students • Internal consulting to reduce reliance on costly external firms • Simplified registration process •

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



Key Initiatives

Supporting the Mission

Ufirst: Human Resources

(led by UHR)

- Conducted technology and process preview sessions for **410 members** of the community
- Implemented new structure with **212 FTE** to serve the academic division and health system
- Updated project plan to reflect **revised January 2019 technology launch**
- Focused on **vigorous technology testing**, user acceptance, parallel payroll, and end-to-end usability

University Business Intelligence (UBI)

(led by Finance)

- Expanded use to **1,300 users**, a 30% annual increase
- Deployed **56 new modules**, including student operational data

- Created **20 custom reports** for schools and units
- Transitioned from project to operational state

Identity and Access Management

(led by ITS)

- Instituted 2-step authentication for better, **more secure** access to University online resources
- Set up self-service portal, improving **ease of use** for faculty and staff to maintain passwords and security

Microsoft Office365

(led by ITS)

- Transitioned all accounts to the cloud, providing a **single platform** for email, calendaring, and Skype as well as new online collaboration functionality
- Increased by **1,000+** times the individual standard storage and the ability to share files internally and externally

ResearchUVA

(led by Office of Sponsored Programs)

- Enhanced information quality and reduced rework with electronic proposal review form (ePRF) — **2,632 ePRFs generated**
- **352 users** (8,024 logins since launch) of dashboard and analytics tool with 24/7 access to proposal, award, and expenditure data
- Supported **\$1.68B** in proposal activity and **\$393M** in awards, a one-year increase of 11% in awards

Strategic Sourcing

(led by Procurement)

- **\$1.2M** annual cost savings from strategic contracts
- Streamlined purchasing of research equipment and supplies, saving research faculty and staff time valued at **\$800K+**
- Leveraged savings of **\$350K+** through the Virginia Higher Educational Procurement Cooperative

Consulting Services

Partnering for Excellence

Provided 15+ custom engagements to assist schools and units clarify and achieve their goals. Highlights:



- **Office of the Sr. VP for Operations:** Reviewed and improved Capital Project Planning process

- **School of Engineering:**
Leadership: Assessed strategic progress and designed support to advance cross-cut and disciplinary excellence

Advancement: Aligned vision and mission for enhanced performance

- **Human Resources:** Redesigned process for an integrated, faculty-/staff-centric onboarding
- **Staff Senate:** Coached and guided project management to support committee work

- **Office of the Treasurer:** Developed shared identity and service vision
- **College of Arts & Sciences:** Reviewed and improved financial process workflow and responsibilities
- **National Radio Astronomy Observatory:** Clarified strategic direction, aligned current activities, and developed goals
- **Center for Undergraduate Excellence:** Expanded and enhanced support for undergraduate research opportunities
- **Office of the Vice President for Research:** Assisted faculty to create a positive research excellence culture

"It helped us **understand our strengths and weaknesses**, and it gave us some **direction** about things we needed to focus on as an office."

"Facilitated a highly effective retreat focused on **teamwork and vision**, mission, and values creation."

"We have created an **openness to working together**, reinforced that we are all one team, and built some initial bridges to partner with faculty and others on Grounds."

"This process really helped lift the gaze to try to **see the bigger picture** of what our office can be doing."

University Project Portfolio

Align, Coordinate, Succeed

Partner with functional sponsors/leaders, project teams, the OE Leadership Council (OELC), and OE Executive Sponsors to facilitate the portfolio governance and process.

- Convene regular project manager meetings for sharing and coordination
- Implemented gating framework to guide projects from inception to closeout
- Implemented software to standardize collection of project and portfolio information
- Creating reports for the University community about projects' scope, schedule, key activities, and user-group impacts
- Facilitate enterprise planning and coordination of cross-project dependencies



Projects Under Review: 6

Project Closeouts: 3

Active Projects in the Portfolio: 11

- University Business Intelligence (UBI)
- TravelUVA & ExpenseUVA
- Microsoft Office365

- Ufirst
- ResearchUVA
- Finance Strategic Transformation
- Total Supplier Management
- Identity & Access Management
- Data Governance & Strategy

- Strategic Sourcing
- Chart of Accounts
- GA Reconciliation Process Improvement
- Payroll
- Faculty Annual Reporting

Quality Communities

Developing Individuals, Serving the University

Quality CORE Network

creates space for individuals to connect, collaborate, and learn together. Topics included creative leadership, project management, change management, best practices, the future of higher education, innovation, and an overview of University Project Portfolio.



Sessions: 8

Participants: 250

Participants' Rating of Value: 4.6 out of 5

Change Management Workshops

- Sponsored two, three-day Prosci certification workshops
- **36 participants** from **24 diverse areas** across schools, units, and central services learned the fundamentals to drive sustainable, successful change



Communities of Practice (CoPs)

- Two self-governing shared interest groups for individual and organizational development met throughout the year: **Change Management** and **Research Administration**.
- The UVA community also participated in national, **virtual CoPs** of Change Management, Lean, and Leadership

Spotlight on Excellence

celebrates individuals and teams who lead improvement and innovation in their daily work. Seven individuals were nominated by peers and honored for collaboration, creative problem-solving, and streamlining processes.

- **Ana Lynch** Executive Vice President/COO
- **Patrick Stanley** University Advancement
- **Ann Lawrence Grasty** University Advancement
- **Cheryl Gearhart** Information Technology Services
- **Christina Meyer** Information Technology Services
- **Debbie Jordan** University Advancement
- **Marcus Hamilton** Human Resources



"Great speaker and new ideas that I can apply to my work and life!"

"Good for learning and networking and feeling like a part of the University."

"Excellent! Just the right balance of information presented and exercises!"

– Quality CORE participants

"I found the training very informative, and I see many ways in which the skills, knowledge, and tools taught will be directly and immediately valuable to my work."

– Change Management participant

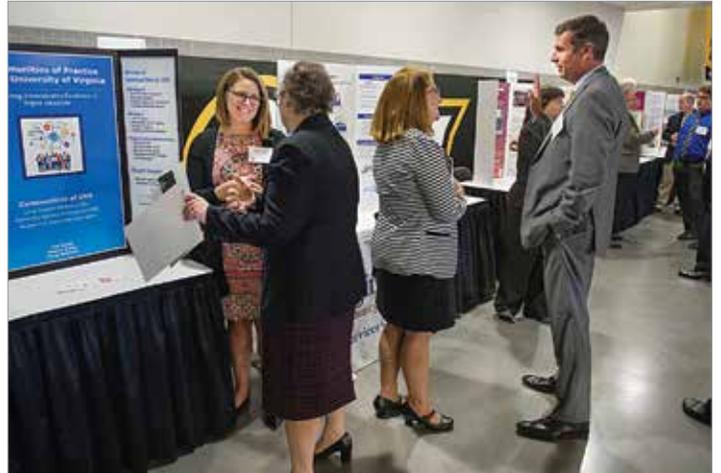
"The collective knowledge of community members improves everyone's understanding of best practices and helps facilitate organic growth through partnerships and opportunities for spontaneous innovation."

– Research Admin. CoP leadership

Enhancing Organizational Capacity for Change

Serving the UVA Community

- University Bicentennial Commission
- Staff Senate Advisory Committee
- Finance Project Advisory Committee
- Finance Strategic Transformation Selection Committee
- Internal Controls Project Steering Committee
- GA Reconciliation Project Steering Committee
- Ufirst Strategic Operations Committee
- University Committee on Information Technology
- UVA Forward Planning Committee
- School of Medicine Be Smart Steering Committee
- Cornerstone Program mentor, project sponsor, and presenter
- Search Committees
- Guest lecturer for higher education graduate program
- Outreach and presentations to key stakeholder groups



Engaging With Higher Education Peers

- Network for Change and Continuous Innovation (NCCI) service, including Board of Directors, Network for Strategic Initiatives Committee, and Advisory Committee
- Delivered change leadership retreat for George Mason University Advancement community
- Co-led statewide conference on innovations and efficiencies, Partnering For Progress, in Richmond, VA
 - » 350 attendees, 100 poster presentations, and 60 flash talks
 - » UVA showcased 13 posters and delivered 8 flash talks
- Participated in 2017 NCCI conference
 - » 9 UVA attendees
 - » 4 UVA presentations
- Advised other higher education quality programs, including Saint Louis, Virginia Commonwealth, Sonoma State, Wayne State, California System, and Notre Dame
- Quality CORE Network cited as an innovative practice by the Education Advisory Board, highlighted at the 2018 Chief Business Officers Summit



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 is provided by Executive Sponsors (EVP/COO Pat Hogan, EVP/Provost Tom Katsouleas, Dean Bob Pianta, and Sr. VP Colette Sheehy), and the Organizational Excellence Leadership Council (OELC).

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