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.

EXCELLENCE ACROSS GROUNDS

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

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

CUTIVATING A CULTURE OF QUALITY

2017/hyphen.cap18 ANNUAL REPORT

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

Savings:

<table>
<thead>
<tr>
<th>Year</th>
<th>Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-15</td>
<td>$11.5M</td>
</tr>
<tr>
<td>2015-16</td>
<td>$16.7M</td>
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<tr>
<td>2016-17</td>
<td>$20.1M</td>
</tr>
<tr>
<td>2017-18</td>
<td>$21.5M</td>
</tr>
</tbody>
</table>

Cumulative savings: $82.1M
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

**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

**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

**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

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

Project Closeouts: 3
- Ufirst
- ResearchUVA
- Finance Strategic Transformation
- Total Supplier Management
- Identity & Access Management
- Data Governance & Strategy

Active Projects in the Portfolio: 11
- Strategic Sourcing
- Chart of Accounts
- GA Reconciliation Process Improvement
- Payroll
- Faculty Annual Reporting

Quality Communities

Quality CORE Network
- Creates space for individuals to connect, collaborate, and learn together.
- Topics included creative leadership, project 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/CIO 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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