Organizational Excellence

Organizational Excellence (OE) drives high-quality and value-added service delivery and promotes a culture of excellence. Measurable benefits include increased performance, reduced complexity, standardization, automation, enhances stakeholder satisfaction, and strategic reinvestment of time and savings to support core mission activities.

**KEY PROJECTS**

- Ufirst
- Managerial Reporting
- Research Administration
- Finance Strategic Transformation
- Portfolio Management
- Office365

**UNIVERSITY PORTFOLIO**

- Tracking 13 institutional projects
- 7 projects in the queue for intake assessment
- Implementing software for collecting project and portfolio information
- Monitoring development of institutional data strategy due to project dependencies

**UFIRST: HR SOLUTIONS FOR YOU**

- Rescheduled Workday technology launch to January 2019
- Conducted Technology and Process Preview Feedback sessions for the Health System and Academic Division
- Conducted end-to-end usability testing of Workday technology

**RESEARCH ADMINISTRATION**

- Continued to build out Sponsor Award setup processes and interface with key systems
- With new leadership in Sponsored Programs, reassessed improvement opportunities and created a 2018 roadmap
- Developed a Research Administrator Dashboard in conjunction with Managerial Reporting to provide enhanced reporting capabilities

**SAVINGS & REALLOCATION TARGET**

$21.58 m
FY 17-18

**NEAR-TERM PRIORITIES**

- **Ufirst**: Update project plan to reflect the January 2019 launch date. Assess cost implications of delay.
- **Managerial Reporting**: Sunset of legacy system on April 30th. Transition project to operational state.
- **Finance/Budget**: Select an external consulting partner for the planning and assessment phase of finance strategic transformation.
- **Portfolio Management**: Conduct onboarding of current projects into the enterprise software solution.
- **OE Consulting**: Process improvement review of Capital Project Planning; Engineering Advancement Retreat.

**VARIOUS PROJECTS**

- **Managerial Reporting**: Conducted 11 focus groups for finance users to provide feedback to the project team on financial reporting.
- **Office365**: Completed full deployment of all Office365 applications including Groups, Teams, SharePoint Online and Office ProPlus.

**OE CONSULTING ENGAGEMENTS**

Facilitated sessions:
- School of Engineering Leadership Team, Dept. Chairs., Cross-Cut Initiative Leaders – reaffirm strategy, assess progress, develop action plan
- Office of the Treasurer – shared vision of service and innovation
- Cornerstone Leadership Program – Ideas to Action

**CREATING A CULTURE OF QUALITY**

- 70+ participants in 2 Quality CORE sessions on:
  - Project Roundtable to learn about major institutional projects
  - Creative Leadership and Innovation
- Facilitate a monthly Change Management Community of Practice to share ideas and best practices.