The Organizational Excellence (OE) Office advances a culture of collaboration, high performance, and continuous improvement at the University of Virginia (UVA). OE partners with schools and units to support core mission activities and realize the University’s goals. This report highlights organizational excellence accomplishments from across the University.
EXCELLENCE EVERYWHERE

UVA’s schools and units make the University’s continuous improvement and organizational excellence goals a reality.

C O N S U L T I N G

E partnered with schools and units across Grounds to provide custom consulting to help them achieve their desired outcomes related to strategic planning, process improvement, leadership, and organizational change. The 20+ engagements varied in duration and complexity.

261+ Improvements, Partnerships, and Cost-Savings

SUPPORTING “OURS TO SHAPE”

2018-2019 ENGAGEMENT HIGHLIGHTS:

- Advancement Annual Giving Consortium - taught leaders from 40+ institutions how to use several Liberating Structures in their work
- Alumni Association - worked with the team to define core values and act on them
- Batten School - led an interactive Alumni Advisory Board retreat to support a successful leadership transition and identify priorities
- Center for Teaching Excellence - developing a process for learning technology software selection and integration
- College of Arts & Sciences - guided efforts to identify and implement business process improvements
- Division of Safety & Security - facilitating strategic planning sessions to guide the creation of the new department and establish short, medium, and long-term goals, and action plan
- Human Resources Business Partners (Academic Division) - designed activities to promote connection and community within a new team
- Office of the Executive Vice President and Provost - coordinating the implementation of faculty hiring, process improvements
- Office of Sponsored Programs - collaborated to develop a request for information for a cloud-based system replacement as part of ongoing efforts to support research administration improvements
- School of Engineering - helped the diversity and engagement team define its vision and goals, and prioritize activities; led retreat sessions to prepare the advancement group for a successful campaign
- Senior Vice President for Operations - managed a project to improve Capital Project processes, from initiation to completion, and pilot improvements this year
- Special Collections Library - executed a team retreat to enable planning and change preparation
- Vice President for IT - planned and facilitated a Digital Transformation summit to consider potential high-impact upcoming projects

A Vision of the University’s Future

Through the “Ours to Shape” program, President James E. Ryan invited UVA faculty, staff, students, alumni, and community members to share their ideas about the themes of community, innovation, and service to help create a shared vision for UVA. Participants contributed input through a website and outreach sessions.

The OE team supported the planning process by facilitating eight outreach meetings, including sessions for the executive vice president and chief operating officer, the executive vice president and provost, and the School of Engineering. Additionally, OE provided facilitation design for another 18+ sessions and contributed to the refinement of ideas. These sessions gathered input from hundreds of faculty, staff, and students.

In addition to facilitation support, Organizational Excellence assisted with the aggregation and analysis of 2,600 comments from the website and in-person events. This work enabled the strategic planning committee and executive leadership to identify key opportunities to inform the strategic plan.
**KEY UPP ACTIVITIES**

**Portfolio Summit**
Organizational Excellence Leadership Council (OELC) members, school associate deans for administration, project leaders, and others convened to do the following:
- Review and affirm the UPP’s vision.
- Concede UPP’s value and benefits.
- Identify enablers and barriers to successful implementation.
- Generate ideas about how to optimize the portfolio to benefit the projects and University, serving the overarching mission.

**New Reports**
Ongoing collection and analysis of information enables coordination among the UPP projects and allows for the identification and resolution of challenges. OE created several new reports this year:
- End-User Impact – This report shows the timing and magnitude of individual project impacts on a specific group of people, as well as the cumulative impacts of multiple projects on any one group.
- Risk Register – The register tracks concerns that stretch across the portfolio.
- Status Report Definitions – The project status report of a project’s schedule, scope, risks, budget, resources and change management was improved by refining the definitions for more consistent and clear reporting.

**UPP Project Roundtable**
To help University community members gather information about many projects underway, OE hosted a roundtable session. Representatives from seven projects shared the reasons for the projects, impacts on stakeholders, opportunities for feedback, and answered questions.

**Large-Scale Project Insights for Success**
To better understand insights across large-scale UVA projects, OE gathered information from existing internal and external project reviews and stakeholder feedback. The goal of aggregating the information was to identify these critical factors for successful UVA projects:
- Institutional Alignment
- Communications
- Stakeholder Engagement
- Effective End-User Implementation
- Post-Project Monitoring

**UPP Project Roundtable**
OE shared these findings with current project teams and is piloting a recurring survey to assess these factors throughout a project’s lifecycle. Survey results will provide timely feedback, confirming areas of project effectiveness and identifying opportunities for improvement. This feedback will enable project teams to make informed decisions to ensure successful project completion.

**Data Governance**
(2nd by Institutional Assessment & Studies)
Develop a governance model that ensures accurate, secure data is available to those who need access.
- Formed a council of 50+ data stewards and stakeholders
- Created an Academic Division Data Governance Framework
- Developing an enterprise data definition process and documentation system

**Identity & Access Management**
(2nd by Information Technology Services)
Ensure people get access to necessary resources in a timely fashion through the implementation of a modern framework.
- Creating new faculty/staff user accounts earlier in hiring cycle, streamlining onboarding
- Supporting multiple concurrent roles/user affiliations to enable access to the right services when needed
- Achieving near real-time account access and deactivation

**Research UVA**
(2nd by Office of Sponsored Programs)
Create streamlined and efficient research administration processes using a customized enterprise-wide technology platform.
- Generated 2.985 non-funded agreements through new electronic process
- Supported $1.88M in proposal activity and $405M in awards
- Issued a request for information to a cloud-based research administration solution

**Major Capital Projects – Planning and Construction Process**
(2nd by UVA Human Resources)
Define high quality HR services with a new Workday technology.
- Implemented an enterprise-wide HR system with 23,691+ users
- Resolved most cases within 3 days during stabilization post-implementation
- Delivered 2,000+ standard reports and 1,300 custom reports since go-live

For active portfolio projects, teams made significant progress this year. This section includes each project’s purpose and highlights several key accomplishments.
QUALITY COMMUNITIES

Through OE programs, University community members connect with colleagues to learn new skills and knowledge they can apply in their work. These programs include short monthly sessions, immersive workshops, and Communities of Practice (CoPs).

QUALITY CORE MONTHLY PROGRAMS

Nine sessions, including creative problem solving, storytelling, design thinking, asking better questions, moving agendas, and resolving conflict.

9 Sessions | 202 Participants
4.6/5 Presenters Were Knowledgeable
4.6/5 Content Applicable to Work
4.6/5 Overall Session Value

"I appreciate the opportunity to practice and learn with others."

"Thank you! I left with direct specific tools that will be a value-add to my work."

Expanding the Impact of Conference Insights

In 2018, nine representatives from UA participated in the Network for Change and Continuous Innovation (NCCI) Annual Conference, joining the 200+ participants from across the country. OE staff gave two presentations.

To leverage what they learned, UA participants shared information from conference sessions they attended to colleagues in an OE session. Topics included creating a coaching culture, measuring change impact, implementing time-driven activity-based costing for higher education, facilitating creatively, communicating about change, and using interactive challenges to learn about process improvement.

COMMUNITIES OF PRACTICE

Project Management

- Launched a new University-wide CoP to enhance project management capabilities and learnings for successful projects
  - 111 members and growing
  - Topics of focus include project management tools, a resource repository, and sharing best practices across Grounds
  - Added project management resource page of basic tools and templates to the OE website

Change Management

- Continued CoP to enable change management practitioners to remain current on best practices, discuss challenges/opportunities for current change management projects, and network with colleagues throughout UA to improve change capacity
  - Members from three Prosci change management certification cohorts and others
  - Topics of focus include a book club of change-related books, review of the updated Prosci portal, and guest presentations from UC Davis and Northwestern on communicating during uncertainty and building change leadership capacity

IMMERSIVE WORKSHOPS

OE sponsored immersive programs this year on Liberating Structures and Prosci Change Management. These longer, in-depth programs enable participants to gain an advanced understanding to apply in their work.

Liberating Structures

To inspire new ways of working together for better results, OE sponsored two immersive Liberating Structures (LS) workshops. Liberating Structures are techniques that shift the way we facilitate meetings, feedback, and make decisions. They promote collaboration, creative thinking, and inclusion of diverse perspectives to improve outcomes.

2 Sessions
135 Participants Representing 30+ Schools, Units, Foundations, Centers, and the Health System
94% Strongly Agreed/Agreed Applicable to Work
82% Highly Likely/Likely to Recommend to Colleagues

"Particularly enjoyed working with a diverse group from across Grounds who brought such a variety of experiences and ideas to the workshop."

In November, participants learned and practiced seven Structures during a two-and-a-half-day workshop. The reach of these impactful structures grew further when LS co-developer Keith McCandless led a two-day workshop in April. Attendees experienced 20 structures, learning through doing. Design team representatives, from the medical school, arts and sciences, student affairs, finance, career center, and OE partnered with McCandless to plan and lead the session. Following both sessions, people immediately shared stories about using Liberating Structures.

"Loved it. Have already used 1 LS in meetings and really enjoy this kind of creative, inclusive way of getting people to share and build ideas."

To encourage the spread of LS across Grounds, OE supports users with individual coaching, lunch and learn sessions, and additional workshops.

Prosci Change Management

In this three-day certification program, participants developed change management skills, learning to apply a research-based methodology and tools to projects to improve UA's capacity for change.

18 Participants From
7 Administrative Areas and
4 Schools/Academic Units

4.8/5 Strongly Agreed/Agreed Would Recommend to Colleagues
4.8/5 Strongly Agreed/Agreed Can Apply to Work
4.8/5 Highly Confident They Understand That Effective Change Management Improves Results

"Training came at an opportune time given a large initiative that I've been tasked with, and the nature of the initiative is highly dependent on people and change."

"Coming to the realization that we often implement new projects or processes with little emphasis on getting people through the stages of change. The ADKAR model really framed this well for me."
HOW WE SERVE

THE UVA COMMUNITY

- Coached and mentored others in organizational leadership and specific skills and tools
- Contributed as Cornerstone Leadership Program mentor, presenter, and Innovation Culture project co-sponsor with Darden Professor Ed Hess
- Delivered two Finance Matters podcasts: “Change Fatigue” and “What’s in it for us? Practicing Change in Academia”
- Participated on search committees across Grounds
- Presented at the UVA Forward Conference
- Supported the higher education graduate program as a guest lecturer, mock interviewer, and doctoral intern sponsor

Committees:

- Data Governance Council
- Finance Strategic Transformation Steering Committee, Advisory Committee, and Selection Committee
- School of Medicine Be Smart Steering Committee
- Staff Senate
- Staff Senate Advisory Committee
- Ufirst Voice of the Customer and Strategic Operations Committees
- University Bicentennial Commission
- University Committee on Information Technology

BEYOND UVA

- Collaborated with Univ. of Washington and Univ. of Wisconsin
- Advised by other organizations: Ohio State, Wayne State, Northwestern, Arizona, UNC, Emory, National Institutes of Health, EnCompass LLC working with WHO, and First West Credit Union
- Featured in Prosci success story titled “UVA Elevates Project Portfolio Management with Change Management”
- Participated in Charlottesville Center for Nonprofit Excellence Leadership Circle

Presentations:

- “Ask Better Questions to Advance Organizational Change” – Northwestern Webinar
- “Asking Better Questions” – Network for Change and Continuous Innovation (NCCI) Change Management Community of Practice Webinar
- “Creating, Cultivating, and Growing a Community of Practice” – 2018 NCCI Annual Conference Presentation
- “Storytelling for Change” – Cal State System (23 Campuses) Workshop

NCCI Committees:

- Advisory Committee
- Annual Conference Planning Committee
- Board of Directors
- Change Management Community of Practice
- Finance Committee
- Professional Development Committee

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 are provided by Executive Sponsors (EVP-COO Jennifer “J.J.” Wagner Davis, EVP-Provost Tom Katsouleas/ M. Elizabeth “Liz” Magill, Curry School Dean Bob Planta, and Sr. VP Colette Sheehy), and the Organizational Excellence Leadership Council (OELC).

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