UCR Organizational Excellence Speaker Series Summary
Workshop #1

Title: We Develop our People, to Develop our Culture, to Achieve Results: Lean at the University of Washington
Presenter: Mark McKenzie, Program Manager of Finance & Facilities Lean at the University of Washington
Date: Monday, February 23, 2015

Case for Change at the University of Washington:
- Budget cuts of 34% (net)
- Losing permanent positions - vacant and filled
- Heightened customer expectations
- Increasing workloads

Change Implementation at the University of Washington:
- Lean: Identified 8 key wastes (overproduction, waiting, transportation, extra processing, inventory, defects, motion, under-utilized talents)
- Reduced processes to core values
- Implemented team based daily kaizen culture: strategy deployment, visual management, daily kaizen, standard follow-up
- F2 Implementation: the team 1.) identifies problems and sets goals, 2.) maps current state of process, 3.) reflects on progress and reports out, 4.) Identifies issues/ideas for improvement to generate focused objectives
- Created balanced scorecards and operational dashboards
- Developed initiative-focused product improvement teams

Change Outcomes at the University of Washington:

- **Streamline Business Process**
  - $13M+ savings from recycling and solid waste, purchasing covered spending and construction drawings
  - Improved delivery time for materials management, copy services, parking appeals, vendor payments, equipment transfers, grant/contract accounting, and construction drawings

- Increased revenue $625K from creative communications

- **Culture of Continuous Improvement**
- **Process Standardization**
- **Specialization of Services**
  - Improved client/customer satisfaction

- **Culture of Collaboration and Innovation**
- **Professional & Leadership Development**
- **Organization Simplification**

This is a high-level summary. For more information, view the video at http://www.ucr.edu/about/admin/pb_events.html
UCR Organizational Excellence Speaker Series Summary
Workshop #2

Title: Operational Excellence at UC Berkeley
Presenter: Peggy Huston, Chief Operating Officer of Shared Services at UC Berkeley
Date: Wednesday, March 25, 2015

Case for Change at UC Berkeley:
- Over the course of 9 years, state support fell from 28% of total funding per year to 12%
- Administrative environment was difficult (e.g. complex processes, fragmented services, duplication of efforts, misaligned incentives, lack of automation and lack of standardization)
- Opportunity was present (committed leadership, momentum/energy on campus, committed UCOP leadership and change was financially imperative)

Change Implementation at UC Berkeley:
- Diagnostic Phase: evaluated current operations, conducted a comprehensive study of operational/administrative activities and developed options to improve
- Design Phase: created a governing process, an implementation discipline, a program office and new financing models
- OE Principles: act with dispatch, communications, respect for staff, equity and inclusion, student involvement, flexibility in thinking, integrity and openess in external relationships, and a look towards implementation
- Created the ‘leadership spine’ to disseminate/implement change
- Integrated approach to results delivery: from inception to results the following are considered throughout planning, execution, monitoring and closeout of the project: change management, communications, financial management, metrics, risk management and change control

Change Outcomes at UC Berkeley
- **Streamline Business Process**
  - Improved efficiency & quality
  - Online energy management
  - Common desktop tools
  - eProcurement system
  - Financial planning tool
  - Metrics model
  - Enterprise data warehouse
- **Culture of Continuous Improvement**
  - Instilled environment of continuous improvement
- **Process Standardization**
- **Specialization of Services**
  - Shared services center
  - Improved client/customer satisfaction
- **Culture of Collaboration and Innovation**
  - “Leadership spine”
- **Professional & Leadership Development**
- **Organization Simplification**
  - Reduced operations by $75M annually
  - Student business services one-stop-shop

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UCR Organizational Excellence Speaker Series Summary  
Workshop #3

Title: Operational Excellence: How the City of Houston Reached New Heights of Performance  
Presenter: Omar Reid, Director of Human Resources at the City of Houston  
Date: Tuesday, April 14, 2015

Case for Change at the City of Houston:
- Transactional focused organization
- Decentralized operations with inconsistent processes
- Risk averse culture
- Command and control leadership model
- Lack of technology
- $50-$70 million budget deficit

Change Implementation at the City of Houston:
- Implemented rules of a successful relationship: Trust, Communication and Perception is Reality
- Developed a strategic direction: vision, values, mission and goal
- Developed “Matrix Model”: Right person, right place, right job
- System enhancements
- Implementation and standardization of HR systems and processes

Change Outcomes at the City of Houston:
- **Streamline Business Process**
  - Improved efficiencies
  - Health benefits savings of $60 million in three years
- **Culture of Continuous Improvement**
  - Attracted and retained employees
  - Empowered culture w/ connect & collaborate leadership model
  - Transformational focus
- **Process Standardization**
  - Reduction of liability
  - Employee self-service
- **Specialization of Services**
  - Centralization of HR
  - Improved client/customer satisfaction
- **Culture of Collaboration and Innovation**
  - Redesigned health plan
  - Automated open enrollment
  - Deployed new performance measurement appraisal system
  - Technology innovation
- **Professional & Leadership Development**
  - Developed knowledge, skill, abilities (KSAs)
  - Increased Leadership Institute program participation
- **Organization Simplification**
  - Eliminated redundancies

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UCR Organizational Excellence Speaker Series Summary
Workshop # 4

Title: Continuous Improvement at UC San Francisco (UCSF)
Presenter: Mara Fellouris, Executive Director, UCSF Program Management Office
Date: Monday, May 11, 2015

Case for Change at UC San Francisco:
- Manual, paper-based processes with limited enterprise-wide technology
- Where systems existed, duplicate/triplicate data entry
- Snail mail workflows, multiple approvals, and excessive lead times to complete a task

Change Implementation at UC San Francisco:
- Organizational excellence at UCSF is about making sure that every dollar spent is in service to their mission (patients and health, discovery, and education) through excellence.
- Improved and consistent service, improved systems and accessible data, and staff job satisfaction.
- Established performance metrics and the OE Cost Savings Tracking Tool to assist with tracking and extracting valid and valuable information to identify OE strengths and weaknesses.
- Contained and lowered costs associated with business operations.

Change Outcomes at UC San Francisco:

- **Culture of Continuous Improvement**
  - Reduced administrative costs by $48M
  - Organizational realignment to streamline operations

- **Process Standardization**
  - Improved processes and policies to simplify, align procedures, and reduce risk

- **Specialization of Services**
  - Increased people and service effectiveness through enhanced training and consistent performance expectations
  - Enhanced Professional & Leadership Development

- Minimized administrative burdens for faculty to be able to focus on teaching and research
- Improved client/customer satisfaction

- **Culture of Collaboration and Innovation**
  - Investment in systems support, new software, and on-line tools to achieve efficiencies

- **Organization Simplification**
  - For departments, ensured excellent service consistently available regardless of size and resources

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