

**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](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 openness 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**

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| <ul style="list-style-type: none"><li>• <b>Streamline Business Process</b><ul style="list-style-type: none"><li>○ Improved efficiency &amp; quality</li><li>○ Online energy management</li><li>○ Common desktop tools</li><li>○ eProcurement system</li><li>○ Financial planning tool</li><li>○ Metrics model</li><li>○ Enterprise data warehouse</li></ul></li><li>• <b>Culture of Continuous Improvement</b><ul style="list-style-type: none"><li>○ Instilled environment of continuous improvement</li></ul></li><li>• <b>Process Standardization</b></li></ul> | <ul style="list-style-type: none"><li>• <b>Specialization of Services</b><ul style="list-style-type: none"><li>○ Shared services center</li><li>○ Improved client/customer satisfaction</li></ul></li><li>• <b>Culture of Collaboration and Innovation</b><ul style="list-style-type: none"><li>○ "Leadership spine"</li></ul></li><li>• <b>Professional &amp; Leadership Development</b></li><li>• <b>Organization Simplification</b><ul style="list-style-type: none"><li>○ Reduced operations by \$75M annually</li><li>○ Student business services one-stop-shop</li></ul></li></ul> |
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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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