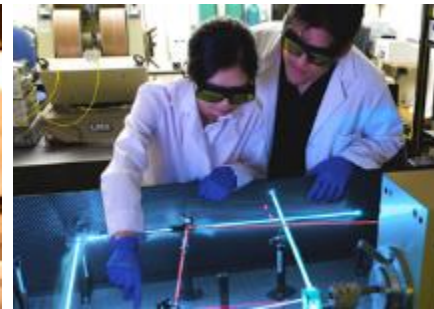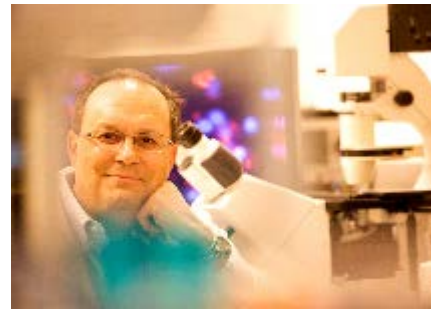# Organizational Excellence (OE) Update

Aug 20th, 2015

Agenda

- Vision of Excellence

- Creating Awareness

- Prioritized OE Outcomes

- OE Work Group - Mission, Approach and Outcome

- Campus Representation in OE Workgroups

- Overall OE Process

- OE at UCR

- Path to Preeminence

- Next Steps

- Conclusion/Questions

Vision: Excellence

"To be a preeminent research university that epitomizes excellence in all that we do."

"UCR 2020: Path to Preeminence"

Organizational Excellence: Creating Awareness

Lean Process At The University of Washington

Mark Mckenzie

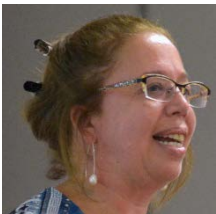Operation Excellence at UC Berkeley

Peggy Huston

Implementation & Standardization of HR Systems/Processes

Omar Reid

Program Management Office at UC San Francisco

Mara Fellouris

*The 5th seminar "**The Path Forward**" was the culmination point for the "speaker series" and enabled us to:*

- *Understand campus preference*
- *Develop campus ownership*
- *Drive personal engagement*

Prioritized OE Outcomes

During our 5th OE seminar, the campus voted on the OE Outcomes that should be prioritized campus wide.

Outcome	Value
Streamline Business Process	186
Culture of Collaboration & Innovation	177
Professional & Leadership Development	166
Process Standardization	165
Culture of Continuous Improvement	154
Organization Simplification	149
Empower Bottom Up Change	144
Specialization of Services	88
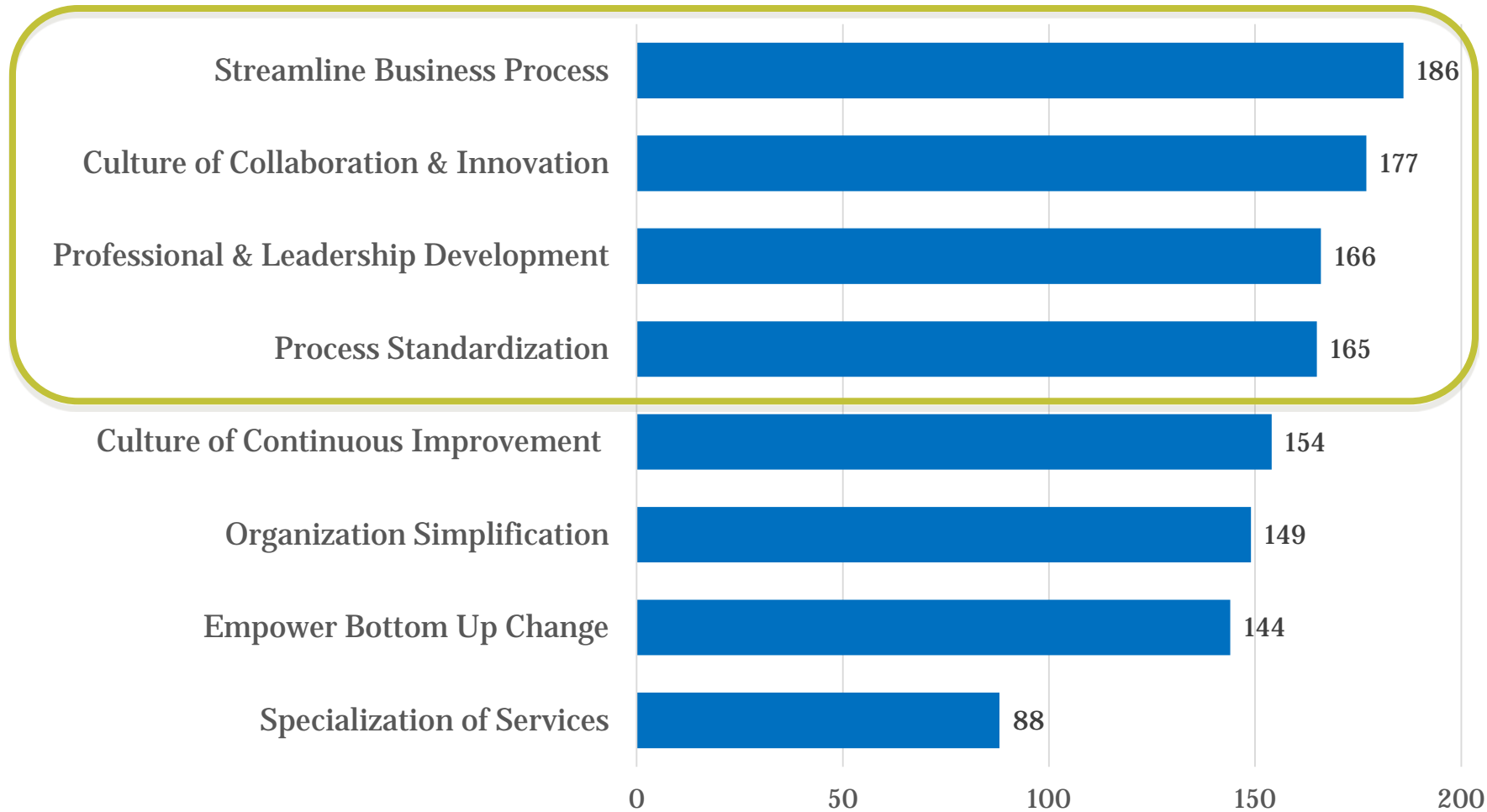
OE Work Group: Mission, Approach and Outcome

3 OE Workgroups were created to explore the attributes of each OE outcome and are chartered with the following:

Mission	To explore the attributes of workgroup's selected OE outcome that are applicable to UCR, and define a recommended approach for adoption.
Approach	Workgroups will embark on a self learning endeavor to reinforce their knowledge on a specific OE outcome through professional development training in order to execute on the mission.
Outcome	A written report on the development framework, analysis and recommendations on the attributes of the OE outcome and suggested path(s) for its adoption.

Campus Representation in OE Workgroups

OE Workgroup	Team Strength	Departments Represented
Streamline Business Process	22	20
Culture of Collaboration & Innovation	11	10
Process Standardization	24	18
Totals	**57**	**48**

Note: we are awaiting final list of participants from one of the teams. We will update this slide once we have that data.

Overall OE Process

We are here

What should we do?	How should we do it?	Let's do it

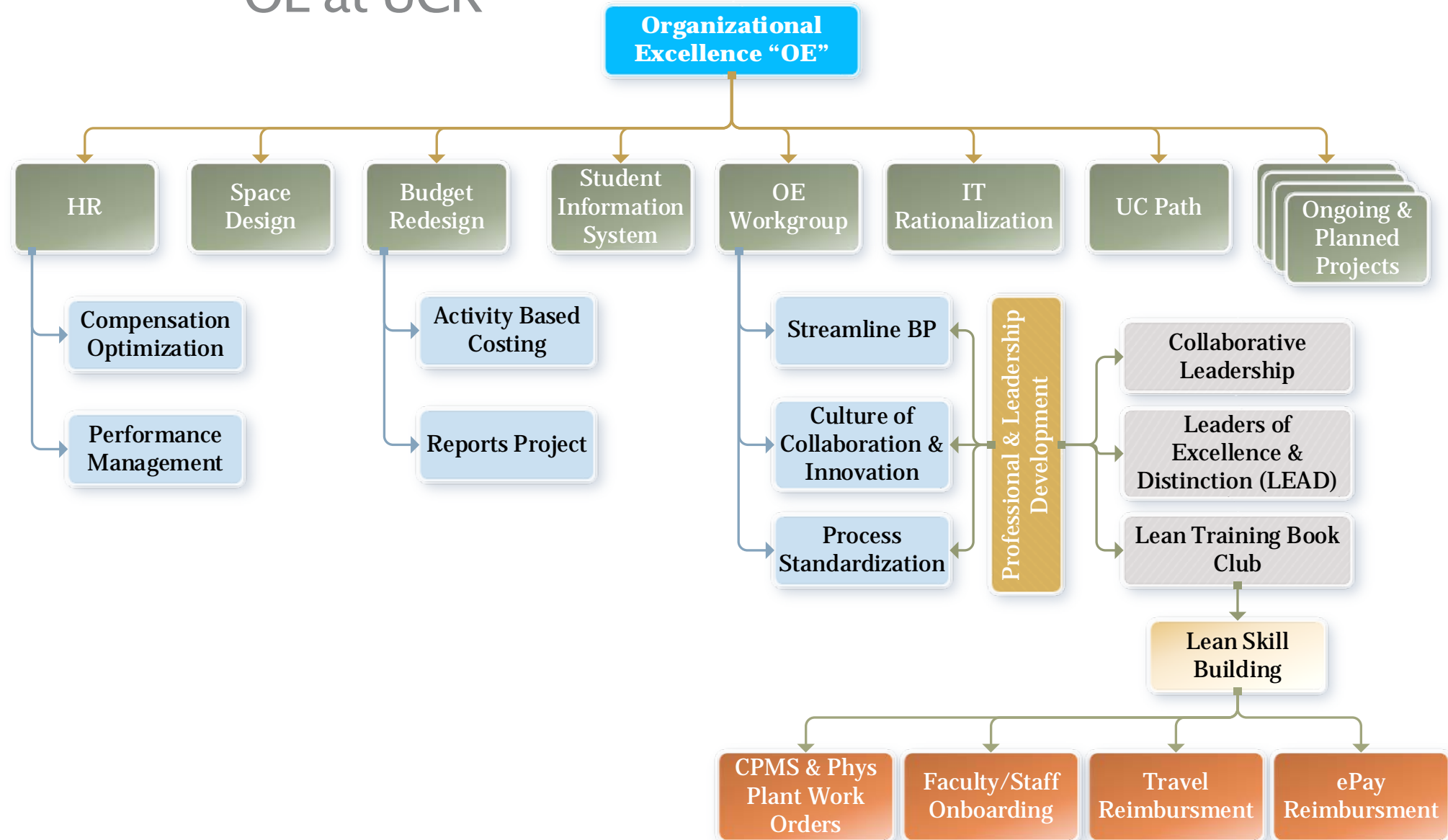2015 ————————— **30 Oct, 2015** ————————→ 2017

- We are developing recommendations about "what" of OE should we adopt.

- Timeline: 30 Oct, 2015

- Develop the program plan to execute identified projects

- Timeline: 2016

- Execute, Monitor and Control Projects

- Timeline: 2016 and beyond

OE at UCR

Organizational Excellence "OE"

- HR
  - Compensation Optimization
  - Performance Management
- Space Design
- Budget Redesign
  - Activity Based Costing
  - Reports Project
- Student Information System
- OE Workgroup
  - Streamline BP
  - Culture of Collaboration & Innovation
  - Process Standardization
- IT Rationalization
- UC Path
- Ongoing & Planned Projects

Professional & Leadership Development
- Collaborative Leadership
- Leaders of Excellence & Distinction (LEAD)
- Lean Training Book Club

Lean Skill Building
- CPMS & Phys Plant Work Orders
- Faculty/Staff Onboarding
- Travel Reimbursment
- ePay Reimbursment

Path to Preeminence

Preeminence

- AAU member profile	- student to faculty ratios	- "Finish in Four"

Reshaping and Growing Enrollment

- Increase number of students to **25,000 students** by 2020 (16% increase)
- Increase **Graduate Students** to represent 88% of student growth
- Increase PhD students by 74%

Faculty Growth

- Hire **300 new faculty** members by 2020 (50% increase)
- Partially offset faculty costs by recruiting an additional **1,500 non-resident** students by 2020 (170% increase)

Research, Scholarship and Creative Activity Growth

- Plan to achieve 500% increase in **Federal C&G expenditures** by 2020 ($40M to $200M)
- Increase number of PI by 50%
- Plan for 240% growth in expenditures per PI

Foundation of Organizational Excellence

- **UC Path**
- **IT Rationalization**
- **Budget Redesign**
- **Student Information System**

- **OE Workgroups**
  - Streamline Business Process
  - Culture of Collaboration & Innovation
  - Process Standardization

- **Professional & Leadership Development**
  - Collaborative Leadership
  - Leaders of Excellence & Distinction
  - Book Club and Skill Building

Next Steps

- Continue to support OE workgroup participants

- Help create awareness

  - Identify opportunities for OE leadership team to present

  - Spread the word / address confusions

  - Identify communication needs and inform the OE leadership team

- Volunteer

Questions

Path to Preeminence

Preeminence

- AAU member profile   - student to faculty ratios   - "Finish in Four"

Reshaping and Growing Enrollment

Faculty Growth

Research, Scholarship and Creative Activity Growth

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