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.

- 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:

<table>
<thead>
<tr>
<th>Mission</th>
<th>To explore the attributes of workgroup’s selected OE outcome that are applicable to UCR, and define a recommended approach for adoption.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approach</td>
<td>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.</td>
</tr>
<tr>
<td>Outcome</td>
<td>A written report on the development framework, analysis and recommendations on the attributes of the OE outcome and suggested path(s) for its adoption.</td>
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</tbody>
</table>
## Campus Representation in OE Workgroups

<table>
<thead>
<tr>
<th>OE Workgroup</th>
<th>Team Strength</th>
<th>Departments Represented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Streamline Business Process</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Culture of Collaboration &amp; Innovation</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Process Standardization</td>
<td>24</td>
<td>18</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>57</strong></td>
<td><strong>48</strong></td>
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</tbody>
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Overall OE Process

What should we do?

- We are developing recommendations about “what” of OE should we adopt.
- Timeline: 30 Oct, 2015

How should we do it?

- Develop the program plan to execute identified projects
- Timeline: 2016

Let’s do it

- Execute, Monitor and Control Projects of OE
- Timeline: 2016 and beyond
OE at UCR

Organizational Excellence “OE”

HR
- Compensation Optimization
- Performance Management

Space Design
- Activity Based Costing
- Reports Project

Budget Redesign

Student Information System

OE Workgroup
- Streamline BP
- Culture of Collaboration & Innovation
- Process Standardization

IT Rationalization

UC Path

Ongoing & Planned Projects

Compensation Optimization

Performance Management

Activity Based Costing

Reports Project

Streamline BP

Culture of Collaboration & Innovation

Process Standardization

Collaborative Leadership

Leaders of Excellence & Distinction (LEAD)

Lean Training Book Club

Lean Skill Building

CPMS & Phys Plant Work Orders

Faculty/Staff Onboarding

Travel Reimbursement

ePay Reimbursement

Professional & Leadership Development

Ongoing & Planned Projects
## Path to Preeminence

### Preeminence

<table>
<thead>
<tr>
<th>- AAU member profile</th>
<th>- student to faculty ratios</th>
<th>- “Finish in Four”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reshaping and Growing Enrollment</td>
<td>Faculty Growth</td>
<td>Research, Scholarship and Creative Activity Growth</td>
</tr>
<tr>
<td>• Increase number of students to 25,000 students by 2020 (16% increase)</td>
<td>• Hire 300 new faculty members by 2020 (50% increase)</td>
<td>• Plan to achieve 500% increase in Federal C&amp;G expenditures by 2020 ($40M to $200M)</td>
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<td>• Increase Graduate Students to represent 88% of student growth</td>
<td>• Partially offset faculty costs by recruiting an additional 1,500 non-resident students by 2020 (170% increase)</td>
<td>• Increase number of PI by 50%</td>
</tr>
<tr>
<td>• Increase PhD students by 74%</td>
<td></td>
<td>• Plan for 240% growth in expenditures per PI</td>
</tr>
</tbody>
</table>

### 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

- 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%
- 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)
- Plan to achieve 500% increase in Federal C&G expenditures by 2020 ($40M to $200M)
- Increase number of PI by 50%
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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OE at UCR

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