Organizational Excellence: The Path Forward
May 26, 2015
Overview of Session

1. Introduction
2. Welcome
3. OE Beyond 2020
4. OE Speaker Series
5. Our Successes
6. Our Voices
7. Activity Setup
8. Break
9. Outcomes Activity
10. Assessment Activity
11. Inspirations Activity
12. Closing
Welcome
Vision: Excellence

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

“UCR 2020: Path to Preeminence”
“UCR 2020: Path to Preeminence”

Strategic Goals

Academic Excellence
Developing a Preeminent Research University for the 21st Century

Access
Enhancing Opportunity for Graduate, Professional, and Undergraduate Students

Diversity
Serving as a National Exemplar for Diversity, Inclusiveness, and Community

Engagement
Shaping our World
Path to Preeminence

Excellence

- AAU Profile
- “Finish in Four”
- Student-Faculty Ratio

Reshaping and Growing Enrollment

- Surpass 25,000 students by 2020

Faculty Growth

- Hire 300 new faculty members by 2020

Research, Scholarship, and Creative Activity Growth

- Increase Federal Contracts & Grants by $200 million

Foundations of Campus Health

- Optimal staffing
- Enhance efficiencies
- Refining and defining the use of space
- Diversify financing & development activities
Organizational Excellence beyond 2020
A Rising Star

TIME

# 1 Best Value

- Six-year graduation rate
- Pell Grants
- Net cost to students
- Affordability

# 2 Best University

- Civic Engagement
- Research
- Social Mobility

Research

- 10th in Natural Science and Engineering by Leiden
- 26th Per capita in Science and Nature
- 35th in Overall Scientific Impact by Leiden
Path to Preeminence

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Organizational Excellence: Achieving Our Goals
Organizational Excellence Speaker Series
Organizational Excellence Speaker Series

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

“Leadership is the capacity to translate vision into reality.” - Warren Bennis
Process Streamlining at University of Washington

Case for Change

• Net Budget cuts of 34%
• Loss of permanent positions
• Heightened customer expectations
• Increasing workloads

Tools & Methodologies

• Lean methodology
• Culture of Kaizen
• Balanced Scorecard
• Lean Waste Management
• Initiative-focused product teams

Outcomes

• Streamline Business Process
  - $13M+ savings
  - Increased revenue of $625K
  - Improved delivery time
• Increased customer/client satisfaction

“We Develop our People, to Develop our Culture, to Achieve Results”
Operation Excellence at UC Berkeley

**Case for Change**
- State support fell from 28% to 12%
- Complex processes
- Fragmented services
- Committed leadership
- Momentum around campus

**Tools & Methodologies**
- OE principles and values
- Current business analysis
- Adoption of delivery methodology
- Integrated approach to results delivery

**Outcomes**
- Organization Simplification
  - Reduced annual operations by $75M
- Streamline Business Process
  - Financial planning
- Culture of continuous Improvement
- Increased customer/client satisfaction

“Toward a sustainable future”
Culture Change at City of Houston

Case for Change
- Budget deficit of $50 - $70M
- Decentralized operations with inconsistent processes
- Risk averse culture
- Command and control leadership model

Tools & Methodologies
- Rules of successful relationship
- Vision, values, mission and goals
- Right person, right place, right job
- HR systems and process reengineering

Outcomes
- Streamline Business Process
  - Health benefits savings of $60M
- Culture of Collaboration and Innovation
- Increased customer/client satisfaction

“It takes focus and commitment to achieve excellence.”
Driving Change at UC San Francisco

**Case for Change**
- Manual processes
- Multiple data entry
- Snail mail workflows
- Multiple approvals
- Excessive lead times

**Tools & Methodologies**
- Values
  - Improve Service
  - Contain and Lower Costs
  - Improve Controls
- Program Management Methodology

**Outcomes**
- Organizational realignment
- Improved policies
- New software and online tools
- Enhanced training
- Increased customer/client satisfaction

“Don’t Lead with the Money.”
Organizational Excellence: Our Path, Our Descriptions
Our Successes
Student Affairs
Core Values

- Engage in partnerships and collaborations.
- Promote and uphold diversity.
- Practice mutual respect.
- Foster innovation and openness to change.
- Serve as a positive role model.
- Listen, assist, and respond with courtesy.
- Practice an ethic of service and care.
- Support professional development.
- Conduct our work with transparency and accountability.

Building on strengths and promoting change, growth, and new ideas that will empower us to provide a superior experience to our students.
Our Successes

Cultivating a meaningful student experience by achieving excellence in supporting, educating, and serving our students.

Major Initiatives

Student Support Systems

Customer Service Programs

- Text N Tell

Achieved streamlined processes and organizational efficiencies through collaborative programs.
Our Voices
“We are transforming UCR to be a national model for academic excellence, student access, and best-in-class administration.”

A National Model for the 21st Century

DEFINING THE PROMISE
- Student Success
- Grow Faculty
- Develop Robust Enrollment Planning
- Progress Master Plan/LRDP
- Enhance Campus Climate

EXECUTING THE PROMISE
- Foster Collaborative Leadership
- Finalize Budget Redesign
- Enact New Space Policy
- Implement Business Intelligence
- Optimize Staff Performance
- Rationalize IT
- Enhance Human Resources

FULFILLING THE PROMISE
- Student Success
- Improve Graduation Rates
- Triple Federal Research Grants
- Maintain Lean Administration
- Enhance Community College Collaborative Relationships
- Diversify Faculty & Staff
Why Organizational Excellence?

Our Current Challenges
Why Organizational Excellence?

Results of no change
Why OE?

Our perceptive barriers to change
Why Organizational Excellence?

If we adopt change
Why Organizational Excellence?

Outcomes of change
Workshop Activities

(05 minutes)
Workshop Activities

1. Outcomes Activity
   
   **Purpose:** Our affinities and preferences towards OE Outcomes.
   
   1. Affinity Poll
   2. Personal Preference Poll

2. Assessment Activity
   
   **Purpose:** Assessing the campus needs.

3. Inspiration Activity
   
   **Purpose:** How do we inspire the campus?
Break

(10 minutes)
Outcomes Activity
Outcomes & Activities

- Culture of Collaboration and Innovation
- Culture of Continuous Improvement
- Empower Bottom-up Change
- Organization Simplification
- Process Standardization
- Professional & Leadership Development
- Specialization of Services
- Streamline Business Process
Workshop Activities

1. Outcomes Activity

**Purpose:** Our affinities and preferences towards Organizational Excellence Outcomes.

1. *Affinity Poll*

2. *Personal Preference Poll*
Your Affinities

Link: OESurvey.ucr.edu

Organizational Excellence: Seminar #5

- Affinity Survey
- Preference Survey
Your Preferences

Link:  OESurvey.ucr.edu

OE Survey

Organizational Excellence: Seminar #5

▶ Affinity Survey

▶ Preference Survey
Assessment Activity

(40 minutes)
Workshop Activities

**Purpose**: Assessing the campus need

What is needed to achieve these outcomes?

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Assessment Activity Report Out
Inspiration Activity
Workshop Activities

3 Inspiration Activity

**Purpose:** How do we inspire the campus?
Inspiration Activity
Report Out
Closing (10 minutes)
Closing

Follow up communication with the group and the campus

- Compiled reports from today’s activities via e-mail and UCR digest
- Organizational Excellence Website
- Feedback
  - organizationalexcellence@ucr.edu
  - Feedback form on the website

Roadmap

- Determine next steps with continued campus collaboration
- Develop and publish Organizational Excellence roadmap