How to Start a Grassroots Movement: UCR’s Organizational Excellence Initiative

Maria Anguiano, UC Regent & CFO, Minerva Project
Ron Coley, Vice Chancellor, Business Administrative Services
Kimberly Villanueva, Interim Director, Strategic Project Management
Jason Rodriguez, Strategic Initiatives Analyst, Financial Planning & Analysis
Topics of Discussion

Learning Outcomes

University of California and UC Riverside

3 Stages of UCR’s Grassroots Movement

Discussion & Report-Out Activity
Learning Outcomes

Launch

- Solicit Leadership buy-in, support and ownership
- Introduce the concept of OE to the campus
- Define the trajectory of OE

Build

- Allow campus to self define areas of need
- Empower & support self – appointed workgroups
- Strengthen feedback mechanisms

Continue

- Build capacity through professional development
- Utilize collaboration tools to sustain momentum
- Provide & show on-going support
THE UNIVERSITY OF CALIFORNIA SYSTEM AND UC RIVERSIDE

MARIA ANGUIANO
UC REGENT & CFO, MINERVA PROJECT
University of California

• 10 Campuses with 5 medical centers & 3 national laboratories

• Established in 1868 and Governed by constitutionally autonomous Board of Regents with 26 members

• Has conferred approximately 1.9 million degrees

• Pre-eminent faculty comprised of 61 Nobel Prize winners with 28 as current faculty
UC Riverside: Distinction & Diversity

- Research productivity & student performance exceed national expectations
- Model for diversity and inclusive excellence
- Designated Hispanic Serving Institution
- Top University in closing gaps in graduation rates among diverse and economically disadvantaged students
Path to Preeminence

Excellence

- Research Preeminence
- "Finish in Four"
- Student-Faculty Ratio

Reshaping & Growing Enrollment
- Surpass 25,000 students by 2020

Faculty Growth
- Hire 300 new faculty members by 2020

Research, Scholarship, & Creative Activity Growth
- Increase Federal Contracts & Grants by $200 million

OE Foundations for Campus Health
- Optimal staffing
- Enhance efficiencies
- Refining and defining the use of space
- Diversify financing & development activities
WHAT IS ORGANIZATIONAL EXCELLENCE?

OE AT UCR SEEKS TO CREATE A CULTURE THAT INSPIRES ALL MEMBERS OF OUR CAMPUS COMMUNITY TO IMPROVE THE USE OF AVAILABLE RESOURCES SO THAT WE OPERATE AT MAXIMUM PRODUCTIVITY.

RON COLEY
VICE CHANCELLOR, BUSINESS ADMINISTRATIVE SERVICES
<table>
<thead>
<tr>
<th>Differences in Approach to OE</th>
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<tbody>
<tr>
<td><strong>Traditional - Top Down</strong></td>
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<tr>
<td>Senior Management:</td>
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<tr>
<td>Identifies solutions and</td>
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<tr>
<td>directs subordinates</td>
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<table>
<thead>
<tr>
<th><strong>Grassroots - Bottom Up</strong></th>
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<tr>
<td>Empowered Staff:</td>
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<tr>
<td>Creates innovative solutions and</td>
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<td>presents to management</td>
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</table>
Operational vs. Organizational Excellence

**Operational**
- Top-down
- Single process focused
- Measures mechanics & results
- Requires Subject Matter Experts
- Requires key stakeholder collaboration

**Organizational**
- Bottom up
- Invests in people of org.
- Builds skillsets & capacity
- Requires participation at all levels
- Requires broader collaboration & feedback
Collaborative & Committed Leadership

- Strongest OE champions
- Attend & support OE events
- Recognize OE workgroups

Chancellor Wilcox
Provost Larive
Vice Chancellor Coley
UC Regent Anguiano
THE THREE STAGES OF BUILDING A GRASSROOTS OE MOVEMENT

- Launch
- Build
- Continue
STAGE 1: LAUNCH THE INITIATIVE
OWNERSHIP, EMPOWERMENT & ACCOUNTABILITY

KIMBERLY VILLANUEVA
INTERIM DIRECTOR, STRATEGIC PROJECT MANAGEMENT
# Introducing OE to Campus

## Sharing Experiences, Value & Best Practices

<table>
<thead>
<tr>
<th>Title</th>
<th>Presenter</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lean Process At The University of Washington</td>
<td>Mark McKenzie</td>
<td>Feb 23, 2015</td>
</tr>
<tr>
<td>Operation Excellence at UC Berkeley</td>
<td>Peggy Huston</td>
<td>March 25, 2015</td>
</tr>
<tr>
<td>Implementation &amp; Standardization of HR Systems / Processes</td>
<td>Omar Reid</td>
<td>April 14, 2015</td>
</tr>
<tr>
<td>Program Management Office at UC San Francisco</td>
<td>Mara Fellouris</td>
<td>May 11, 2015</td>
</tr>
</tbody>
</table>
OE Workshops: Inspiration, Collaboration & Participation

- Speaker sessions support active participation & dialogue
- Participants consider how to apply OE in their own environments

Table Discussions | Exercises | Report - Outs

![Table Discussions](image1.png) | ![Exercises](image2.png) | ![Report - Outs](image3.png)
Creating Ownership & Campus Voice: Workshop Report - Outs

- Empower the campus
- Develop a collective voice
- Identify campus pain points
- Prove the case for change

Visual Feedback Wordles – In Your Words

Current Challenges – May 2015

If We Adopt Change – May 2015
Build the Trajectory: Campus Feedback

The votes are in on what OE areas should be prioritized campus wide


- Streamline Business Process: 158 votes
- Culture of Collaboration & Innovation: 129 votes
- Professional & Leadership Development: 101 votes
- Process Standardization: 98 votes
- Culture of Continuous Improvement: 84 votes
- Organization Simplification: 65 votes
- Empower Bottom Up Change: 64 votes
- Specialization of Services: 18 votes
Grassroots Ownership, Empowerment & Accountability

- A grassroots OE approach provides opportunities to:
  - Empower campus participation & ownership
  - Allow campus feedback to drive the trajectory of change
  - Visualize feedback to hold leadership & campus accountable to progress

Kimberly Villanueva
STAGE 2: BUILD MOMENTUM
PROFESSIONAL DEVELOPMENT, WORKGROUPS, AMBASSADORS, & SPOTLIGHTS

JASON RODRIGUEZ
STRATEGIC INITIATIVES ANALYST, FINANCIAL PLANNING & ANALYSIS

RON COLEY
VICE CHANCELLOR, BUSINESS ADMINISTRATIVE SERVICES
Campus Defined: The Pillars & Foundation of OE

The campus declared professional development as foundational to OE’s success

Streamline Business Practices
Create a Culture of Collaboration & Innovation
Standardize Business Processes

Professional & Leadership Development
Self – Selected Workgroup Research: the “How” of each Pillar

- OE Sponsored support:
  - Guidance
  - Resources
  - Supervisor letters

- Campus-wide recognition
- Debut of recommendations
OE Ambassadors Build Campus Momentum

UCR has 70 volunteer Ambassadors enrolled in the OE program

Promote

OE message & events across campus

Support

Website spotlights, workgroups, marketing, & OE events

Facilitate

Discussion sessions during OE and Chancellor’s campus events
UCR Faculty & the Provost Support OE Initiatives

UCR Faculty have key positions and support OE initiative across campus

- UC Path Project
  - Six Faculty advisors sit on the project steering committee

- Healthy Campus Initiative
  - SOM Dean Co-Sponsors the initiative & faculty co-chairs promote the initiative

- Professional Development
  - Highest rate of faculty in UC-CORO Professional Development Program
UCR - OE CAMPUS SPOTLIGHTS

RON COLEY
VICE CHANCELLOR, BUSINESS ADMINISTRATIVE SERVICES

KIMBERLY VILLANUEVA
INTERIM DIRECTOR, STRATEGIC PROJECT MANAGEMENT
Stakeholder Owned OE Initiatives

- OE Conference and Event Planning Workgroup
- Facilities Integration
- LEAN Book Club
- Humanities migration to shared services
- Dining Excellence
- Healthy Campus Initiative
- Lab Decommissioning Process
- IT Lean Fundamentals
Spotlight: Facilities Integration, the “What” & “How”  Ron Coley

- Integrated 400 Facilities service employees
- Identified 42 promotional opportunities for staff
- Collapsed overhead & infrastructure
- Increased efficiency and productivity

Hosted regular “All Hands” meetings
Created transparent project update process
Process mapped to remove duplicate efforts
Spotlight: LEAN Book Clubs, the “What” & “How”

- 200 LEAN books have been distributed to 5 Book Club cohorts

- VC BAS attends each session of every LEAN Book Club

Book Clubs foster a collaborative environment breaking down traditional work silos from individuals across campus
Spotlight: Event Conferencing Workgroup, the “What” & “How”

- Self-selected Advisory Committee and six sub-committees developed a plan to streamline event planning process

- Approached VCPB with an OE project proposal.

VCPB staffed the project w/ an OE Project Manager

Identified challenges & developed a plan

Hosted focus groups for process input

Reviewed and updated policies & procedures

Developed training program for staff & customers
STAGE 3: CONTINUE THE MOVEMENT
OE CERTIFICATE, COLLABORATION TOOLS, SUCCESS, COMMUNITY & CULTURE

JASON RODRIGUEZ
STRATEGIC INITIATIVES ANALYST, FINANCIAL PLANNING & ANALYSIS
Campus Defined: Professional Development  

The OE Certificate program was born out of a report-out session with campus votes.

Professional Development Training Rankings

<table>
<thead>
<tr>
<th>Training Focus</th>
<th>Rank</th>
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<tbody>
<tr>
<td>Leadership Development</td>
<td>120</td>
</tr>
<tr>
<td>Team Building / Collaboration</td>
<td>100</td>
</tr>
<tr>
<td>Mgmt Supervisor Training</td>
<td>90</td>
</tr>
<tr>
<td>Change Management</td>
<td>80</td>
</tr>
<tr>
<td>LEAN</td>
<td>70</td>
</tr>
<tr>
<td>Project Management</td>
<td>60</td>
</tr>
<tr>
<td>Communication Skills</td>
<td>50</td>
</tr>
<tr>
<td>Process Mapping</td>
<td>40</td>
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Training Focus – May 2016
Purpose of the OE Certificate

- Equip campus with skillsets necessary to facilitate change and promote excellence
- Allows participants at all levels to define their own career development at UCR
- Empowers Staff to be part of the solution and the OE movement

Jason Rodriguez
OE Certificate: Tiers & Benefits

Introduction to OE

skillsets

Apply knowledge &
specialization on project

Bronze Level Benefits:
- Enhancement of professional toolkit
- Entry into OE community

Silver Level Benefits:
- Specialization in key area of OE
- Application of skillsets on projects

Gold Level Benefits:
- Mentorship / Coaching program
- OE Network Group & strategic project forum
- Recognition / Graduation Chancellor’s event

Contribution to campus
and OE initiative
OE Website & Feedback App

oe.ucr.edu

OE Collaborative Leadership Yammer Page

- Social media collaborative forum
- Used to engage w/ colleagues to apply Collaborative Leadership course concepts
OE Showcase: Implications of Success

- Inaugural fair-style event attended by 350 staff, faculty, students, Chancellor & Provost
- Energized campus support & excitement for OE
- 9 - OE workgroups showcased implementations of OE in their Depts.
- OE Ambassadors from across campus actively supported the event
Next Steps: Foster OE Culture & Build Community

- Culture is influenced by shared experiences, lessons learned, celebrating successes and a sense of community.

- Continue OE Certificate development
- Empower Ambassadors to teach and lead OE discussion forums
- Encourage new ideas, feedback from campus & provide support
DISCUSSION & REPORT OUT
UCR’S OE EXPERIENCE

KIMBERLY VILLANUEVA
INTERIM DIRECTOR, STRATEGIC PROJECT MANAGEMENT

MARIA ANGUIANO
UC REGENT & CFO, MINERVA PROJECT

RON COLEY
VICE CHANCELLOR, BUSINESS ADMINISTRATIVE SERVICES
NACUBO APP OE SURVEY
UCR’S SURVEY & INSTANT FEEDBACK EXPERIENCE

KIMBERLY VILLANUEVA
INTERIM DIRECTOR, STRATEGIC PROJECT MANAGEMENT
1. How is change on your campus handled today?

   a) Traditional Operational Excellence (Top-down)

   b) Grassroots Organizational Excellence (Bottom-up)
2: What aspect of UCR’s grassroots approach is most compelling for you personally?

a) Professional development / OE Certificate
b) OE Ambassador program
c) Campus polling
d) Campus wide OE events and discussions
e) Annual OE Showcase event
3. What aspect of UCR’s grassroots approach would work well in your environment?

a) Professional development / OE Certificate

b) OE Ambassador program

c) Campus polling

d) Campus wide OE events and discussions

e) Annual OE Showcase event
4: Pick the top two areas of focus you think your campus should focus on in order to promote change and innovation.

a) Standardizing business processes

b) Professional development

c) Creating a culture of collaboration & innovation

d) Streamlining business processes

e) Other
DISCUSSION & REPORT OUT
UCR’S OE WORKSHOP EXPERIENCE

MARIA ANGUIANO
UC REGENT & CFO, MINERVA PROJECT

RON COLEY
VICE CHANCELLOR, BUSINESS ADMINISTRATIVE SERVICES
1. What inspired you about UCR’s grassroots approach to Organizational Excellence?
   a) Which specific UCR grassroots strategy would you like to implement on your campus?
   b) Why?

2. In our survey, you selected two areas of focus for your campus. Consider how you would strategically move forward in these areas with a grassroots approach.
   a) Where would you begin?
UCR’s Organizational Excellence Initiative
Contact Information & Planning Committee

- Visit our website:
  - http://oe.ucr.edu

- Write to us at:
  - Organizationalexcellence@ucr.edu