Operational Excellence is a University-wide program spearheaded by the Office of the Executive Vice Chancellor and Provost to create a high-functioning administrative operation that supports the University of North Carolina at Chapel Hill’s mission of teaching, learning and research. The Operational Excellence team engages with the Carolina community in a structured and collaborative process that aims to improve service levels while considering the culture of each school and unit.

**ONE YEAR of OPERATIONAL EXCELLENCE**

**SEPT 2018**
- OE launches with a listening tour that hosts over 50 meetings to gather feedback from the campus community
- Based on listening tour feedback, Early Impact Procurement and Hiring Design Teams begin developing tools for initiatives with immediate impact: small-dollar spending and the staff hiring process

**OCT 2018**
- Functional Redesign Teams identify their future state vision for exceptional operations in key areas of HR, finance and research. Early Impact solutions begin pilot testing

**NOV 2018**
- Implementation of Early Impact solutions begins with a rollout to all schools and units over three cohorts between January and September 2019

**JAN 2019**
- The HR Design Team will launch a new student employment website in October. OE is currently planning for two new Academic Year 2019 – 2020 projects to launch in October 2019 and finalizing the Operational Excellence Service Model to be launched later this fall.

**APRIL 2019**
- Based on work of the Functional Redesign Teams, Design Teams led by the OE Transformation Managers begin focusing on research award setup, student employment and travel & expense through a 16-week design process

**AUG 2019**
- The Research Design Team begins piloting a new engagement model and research playbook

**SEPT 2019**
- After clarifying travel policies and surveying campus users to determine a baseline for user experience, Travel & Expense Design Team rolls out new travel website and resources

**COMING NEXT**
- The HR Design Team will launch a new student employment website in October. OE is currently planning for two new Academic Year 2019 – 2020 projects to launch in October 2019 and finalizing the Operational Excellence Service Model to be launched later this fall.

**100+ employees participated on design teams**
**18 pilot areas tested design team solutions**
**36 schools & units implemented solutions in a cohort rollout**
**500+ Carolina faculty & staff engaged overall**

**OPERATIONAL EXCELLENCE SERVICE MODEL**

The Service Model frames the Operational Excellence approach to operational improvement at the University and includes the four services offered by OE to schools and units.

- **Design Team**
  - The primary OE service; used for complex operational opportunities requiring cross-campus support

- **Training**
  - Offered to schools/units seeking outside expertise on the approach and methods to solve an identified challenge

- **Facilitation**
  - Offered to schools/units with an identified and clear challenge and a team in place, but requiring support around structure

- **Advisory**
  - Offered to schools/units requiring high-level advisory support on any dimension of operational improvement

**KEY INITIATIVES**

- Small-dollar spending
- SHRA and EHRA-NF hiring
- Research award setup
- Travel and expense
- Student employment
ONE YEAR of PROGRESS

EARLY IMPACT INITIATIVES

OE LEADS: SUSAN KELLOGG, JOE CANADY and EMILY SUMMERS

PROCUREMENT

> PURPOSE: Standardize purchasing in small-dollar procurement (<$250) to better utilize employee time and University funds

> APPROACH: The Early Impact – Procurement Design Team worked to create easy-to-navigate tools to allow users to determine the most cost-effective purchasing method:
- Purchasing Decision Tree
- P-Card Process Checklist
- Dashboards
- War Rooms

> GOAL: 95% of transactions less than $250 will be completed using one of the University’s preferred purchasing methods

Transaction method used across University

<table>
<thead>
<tr>
<th>Unnecessary Vouchers</th>
<th>35%</th>
<th>10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appropriate Voucher</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>PO Voucher</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>P-Card</td>
<td>23%</td>
<td>43%</td>
</tr>
<tr>
<td>ePro</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Baseline</th>
<th>Current</th>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

+ Reflects transactions from July 24 – August 23, 2019. This figure includes the entire University.

> CURRENT STATE: 90% of purchases across the University are made using a preferred procurement method, a 25 percentage point increase since July 2019

<table>
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</table>

HIRING

> PURPOSE: Streamline hiring process for SHRA and EHRA positions to reduce hiring time and secure top-choice candidates

> APPROACH: The Early Impact – Hiring Design Team worked collaboratively to develop tools that make the hiring process more effective:
- Hiring Playbook
- Dashboards
- War Rooms

> GOAL: The average time to hire for SHRA and EHRA-NF positions will be reduced to 45 days from job posting to offer accepted

<table>
<thead>
<tr>
<th>Average hiring time from posting to offer accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>x = Baseline average hiring time</td>
</tr>
<tr>
<td>82 days</td>
</tr>
<tr>
<td>76 days</td>
</tr>
<tr>
<td>110 days</td>
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</tbody>
</table>

Overall average hiring time

<table>
<thead>
<tr>
<th>593 completed hiring events</th>
<th>472 completed hiring events</th>
<th>121 completed hiring events</th>
</tr>
</thead>
</table>

SCHOOLS, UNITS and DEPARTMENTS

Adams School of Dentistry
Gillings School of Global Public Health
Kenan-Flagler Business School
School of Education
School of Law
School of Medicine
School of Social Work Athletics
VC for Finance and Operations
VC for Innovation, Entrepreneurship and Economic Development
VC for Research
VC for Workforce Strategy, Equity and Engagement
College of Arts and Sciences
School of Government
School of Information and Library Science
General Alumni Association
Office of Ethics
Education and Policy Management
Office of the Chancellor
Office of University Counsel
University Libraries
University Ombuds
VC for Information Technology and Chief Information Officer
Eshelman School of Pharmacy
Husman School of Journalism and Media
School of Nursing
Summer School
The Graduate School
Academic Initiatives
Academic Personnel
Office of the Executive Vice Chancellor and Provost
Office of Undergraduate Admissions
UNC Global
VC for Development

ACADEMIC YEAR 2018-19 INITIATIVES

TRAVEL & EXPENSE

OE LEAD: CANDACE REYNOLDS

> GOAL: Improve user experience for campus travelers

> APPROACH: The Travel & Expense Design Team performed an extensive review to clarify and consolidate UNC travel policies and developed resources and a new website for travelers

> NEXT STEPS: Travel Services within Finance & Operations will continue to manage the website and resources

HUMAN RESOURCES

OE LEAD: MIEKE LYNCH

> GOAL: Provide guidance to the 12,000+ student employees at the University and their supervisors and originators

> APPROACH: The HR Design Team consolidated information on student employment into a “one-stop shop” website. They also rolled out standard principal for HR positions, which allows for faster job description creation.

> NEXT STEPS: The new website will launch in October 2019

RESEARCH

OE LEAD: JASON DERRICK

> GOAL: Streamline the award setup process for federal, industry and non-profit

> APPROACH: The Research Design Team developed an engagement model to add structure to conversations between central research offices and school/unit research administrators (RAs) and playbook to guide RAs through the pre-award and award setup process.

> NEXT STEPS: The engagement model and federal playbook are currently being piloted while the Design Team continues to work on playbooks for industry, non-profit and clinical awards

“THIS IS THE NEW NORM. THERE'S NO GOING BACK. THERE'S ONLY MOVING FORWARD.”
— NOREEN MONTGOMERY, UNC Office of Human Resources