

# Operational Excellence

## 2018 – 2019 ACADEMIC YEAR ANNUAL REPORT

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
OCT 2018	●	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
NOV 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
JAN 2019	●	Implementation of Early Impact solutions begins with a rollout to all schools and units over three cohorts between January and September 2019
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 <b>Operational Excellence Service Model</b> to be launched later this fall.

### 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

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

### 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

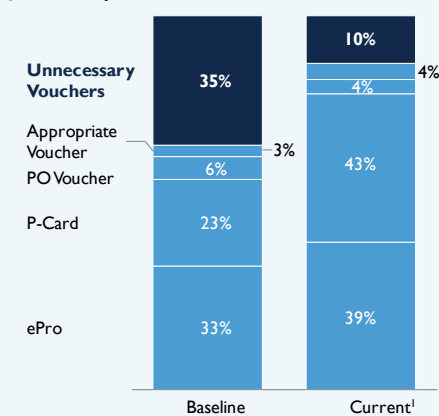
➤ **APPROACH:** The Early Impact – Procurement Design Team worked to create easy-to-navigate tools to allow users to determine the most cost-effective purchasing method:

- **Purchasing Decision Tree** and training sessions help users determine the most appropriate purchasing method
- **P-Card Process Checklist** helps users eliminate unnecessary steps from P-Card transaction process
- **Dashboards** allow senior leaders to track purchasing decisions and see progress in their units
- **War Rooms** are regular meetings set up to track progress and identify obstacles

➤ **GOAL:** 95% of transactions less than \$250 will be completed using one of the University's preferred purchasing methods

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

Transaction method used across University for <\$250 purchases



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

### HIRING

➤ **PURPOSE:** Streamline hiring process for SHRA and EHRA-Non Faculty positions to reduce hiring time and secure top-choice candidates

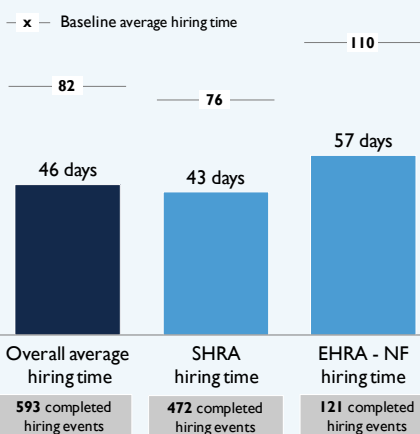
➤ **APPROACH:** The Early Impact – Hiring Design Team worked collaboratively to develop tools that make the hiring process more effective:

- **Hiring Playbook** guides managers and HR representatives step-by-step through the 45-day hiring process and provides best practices
- **Dashboards** provide an overview of active hiring events to hiring managers and senior leaders
- **War Rooms** allow key employees in the hiring process to identify potential obstacles before they lead to delays

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

➤ **CURRENT STATE:** The average hiring time across the University for SHRA and EHRA-NF positions has been reduced from 82 to 46 days from job posting to offer accepted, and 96% of positions were filled with first-choice candidates

Average hiring time from posting to offer accepted



**"THIS IS THE NEW NORM. THERE'S NO GOING BACK. THERE'S ONLY MOVING FORWARD."**

— NOREEN MONTGOMERY, UNC Office of Human Resources

## SCHOOLS, UNITS and DEPARTMENTS

Adams School of Dentistry	Office of Ethics Education and Policy Management	VC for Public Affairs
Gillings School of Global Public Health	Office of the Chancellor	VC for Student Affairs
Kenan-Flagler Business School	Office of University Counsel	VC for University Communications
School of Education	University Libraries	Department of City and Regional Planning
School of Law	University Ombuds	Department of Mathematics
School of Medicine	VC for Information Technology and Chief Information Officer	Department of Physics and Astronomy
School of Social Work	Eshelman School of Pharmacy	Department of Applied Physical Sciences
Athletics	Hussman School of Journalism and Media	Center for European Studies
VC for Finance and Operations	School of Nursing	Department of Biostatistics
VC for Innovation, Entrepreneurship and Economic Development	Summer School	Department of Nutrition
VC for Research Strategy, Equity and Engagement	The Graduate School	NC Institute for Public Health
College of Arts and Sciences	Academic Personnel	Department of Maternal and Child Health
School of Government	Office of the Executive Vice Chancellor and Provost	Institute for Global Health and Infectious Diseases
School of Information and Library Science	Office of Undergraduate Admissions	Department of Surgery
General Alumni Association	UNC Global	Neuroscience Center
	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



**New Travel Website & Resources:**  
[travel.unc.edu](http://travel.unc.edu)



**Clarified UNC Travel Policies**

### 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



**Student Employment Website**



**Standard Principal Functions for HR Positions**

### 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 playbooks 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



**Research Playbooks**



**Engagement Model**

