

# Survey of Organizational Development in Higher Education

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FINAL for NCCI Annual Conference Summer 2017

Updated August 2, 2017



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**QUALITY IMPROVEMENT**  
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**Purpose:**

The following document explores how leading institutions in the field of Higher Education Organizational Development (OD) are structured, provide services, and where they report in their host institutions. Lessons learned and themes are derived from interviews with ten leading Higher Education OD units across the US and Canada.

**Summary Information for Benchmarked Institutions and Interviewees:**

(in alphabetical order by institution)

<b>Institution, interviewee, office name</b>	<b>Full Time Employees</b>	<b>Serves Academic Units?</b>	<b>Types of Clients</b>	<b>Reporting</b>
• Carleton University, Cindy Taylor Office of Quality Initiatives (OQI)	9	Yes	Both Academic/ Administrative	Finance & Admin
• Cornell University, Kathy Burkgren Organizational & Workforce Development	12.5	Yes	25% Academic / 75% Administrative	Human Resources
• Emory University, Bill Dracos Business Practice improvement, University consulting Association	12	Yes	30% Academic / 70% Administrative	Business & Admin
• Northwestern University, Jake Julia Office of Change Management	8	Yes	50% Academic / 50% Administrative	Provost & Admin
• Rutgers University, Brent Ruben Center for Organizational Development and Leadership	6	Yes	75% Academic / 25% Administrative	VP Academic Affairs
• University of Michigan, Catherine Lilly The Business & Finance Leadership Academy	4	No	100% Administrative unless special projects	Business & Finance
• University of Notre Dame, Carol Mullaney Office of Continuous Improvement	3	Yes	50% Academic / 50% Administrative	Executive Vice President
• University of Virginia, Sarah Collie Organizational Excellence	6	Yes	65% administrative/ 35% academic	Executive Vice President/COO
• University of Washington, Ruth Johnston Organizational Excellence	9.5	Yes	50% Academic / 50% Administrative	Admin
• University of Wisconsin-Madison, Darin Harris Office of Quality Improvement (OQI)	9	Yes	60% Academic / 40% Administrative	Provost

## **Major Lessons Learned and Themes Across Interviewed OD Units:**

- **Reporting Lines:** The great majority of OD offices report to the administrative executives in their organization: the CFO, Vice Chancellor for Administration and Finance, Vice President for Business and Finance, etc.
- **Academic Projects:** Nearly all of the OD units across the benchmarked institutions delivered services to both the administrative and academic sides of the organization. This is regardless of their reporting lines---as stated previously usually to the administrative CFO, Vice Chancellor for Finance, etc. This rebuts a perceived trend towards exclusively focusing on administrative improvement projects. Moreover, the nature of these projects within the academic side are often substantive in nature; meaning that they involve the research, teaching, or outreach mission of the unit in addition to operational or administrative. Therefore, having a foothold in academic projects and clients seems significant for the success of these types of units, regardless of their reporting lines.
- **Services Offered:** A wide range of OD services is offered across the benchmarked units from process improvement and strategic planning to leadership development. There are, however, a suite of common services offered across nearly all of these units as well as some emerging service trends. These include:
  - **Process Improvement, Strategic Planning and Operational Excellence:** These “business planning” functions are alive and well. Every unit offers deep strength and bandwidth in these services, and nearly all have training in the newer models of Lean or Six Sigma. The trend is towards larger and more complex cross institutional efforts at higher scales--meaning increased project visibility and executive leadership involvement.
  - **Organizational Restructuring/Redesign:** Given the fast pace of change in Higher Education, there is a demand for modernizing the 75-100 year-old structures that many Departments, Schools and Colleges, and units have built.
  - **Leadership Development:** There is a trend towards OD offices offering not just single training programs but bundles or series of training efforts in order to develop a new pool of leaders who can address ever complex institutional challenges. While some OD offices have merged with Human Resources offices others have remained separate or have branded programs to build institutional leadership capacity. This is an area of possible tension depending on how the conversation is framed at an executive level.
  - **Project Management:** Once an add-on in OD shops, project management has become a staple of services offered to institutional clients. At this time, project management is engrained within how OD units operate. OD units are now functioning like “Project Management Offices (PMO)” often carrying dozens of projects at once. This creates a need for managing projects at the portfolio level as well as coordinating with other units on campus who increasingly operate using project management tools and approaches.
  - **Metrics and Performance Measurement:** Measuring and demonstrating performance is once again rising in importance. Nearly all units interviewed are offering and exploring services in how to measure the outputs and outcomes of a client’s endeavors. In many cases, metrics are being used to incentivize or reward unit-level performance. This puts increasing pressure on OD shops to become more fluent in delivering rigorous, data driven metrics systems that can stand up to audit as well as political pressures.
  - **Change Management:** With the rapid pace of change comes an interest in how change can be managed and projects implemented for the long term. Clients are asking not just

for a planning retreat but specific ways to ensure execution in the face of traditionalists and more established actors who resist necessary change: be it technological, methodological, or institutional.

- **Cutting Edge:** Some new services are entering into the units that can be placed on the “watch list”. They include professional coaching/mentoring, conflict resolution/complex problem solving, large scale public engagement, and diversity/inclusion consulting.
- **Project Evaluation and Client Satisfaction:** This varies significantly across the units interviewed raising the question of how such units are holding themselves accountable to the clients they serve. Some units have advisory boards, some informal evaluation on a project by project or even consultant by consultant basis. This seems to be a ripe area for more systematic improvement.

### **Raw Notes from Interviews**

Please note that these interviews reflect the interviewer's summary ideas and are used to inform the analysis and big picture themes in the first part of the document.

#### List of Questions Asked by Interviewer:

1. What is the name of your office/unit?
2. Number of people in office and basic roles
3. What kinds of services do you provided? (Types of projects, breakdown)
4. What kinds of clients do you serve? (percentage academic/administrative)
5. Do you work with academic units? If so, doing what?
6. How do you get work? Request? Sent in? Who decides?
7. Do you have an advisory committee to provide input or counsel to you – formal or informal?
8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?
9. How are you organized administratively and connections in organization (reporting)?
10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?
11. How does professional development occur?
12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?

## Carleton University, Cindy Taylor

1. **What is the name of your office/unit?**  
Office of Quality Initiatives (OQI)
2. **Number of people in office and basic roles**  
8 including director; SP, Lean, Learning and development communications
3. **What kinds of services do you provided? (Types of projects, breakdown)**  
See flyer/doc = in charge of planning
4. **What kinds of clients do you serve? (percentage academic/administrative)**  
Both → admin (started w/ benchmarking model, finance academic (ex. interatrandization, servicing labs, research institutes, shared services)
5. **Do you work with academic units? If so, doing what?**  
Yes, see #4
6. **How do you get work? Request? Sent in? Who decides?**  
Word of mouth; ripples from good work...
7. **Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
org excellence steering committee → overseen by VPres, F and
8. **Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Admin (only benchmarking, Lean, service excellence, Learning and prof development; 1/month meetings
9. **How are you organized administratively and connections in organization (reporting)?**  
V Pres, Finance and Admin
10. **How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Evaluation focus groups, KPIs for six-seven areas
11. **How does professional development occur?**  
Lots of PD → WCCI individual training and develop' partnership with other universities (Sheffeild)
12. **What are top organizations like yours nationally whom you benchmark---who do you consider the "best of best"?**  
Sheffield, Cornell, Rutgers, Notre Dame (Lean Specific)

## Cornell University, Kathy Burkgren

1. **What is the name of your office/unit?**  
Organizational & Workforce Development, Cornell University
2. **Number of people in office and basic roles**  
Organization...
  - Sr. Director OWD
  - Sr. Management Consultant, OWD
  - Sr. Management Consultant, elearning and Finance focus, OWD
  - 4.5 OD Consultants (Process improvement; leadership, management and administrative development training; strategic planning/change management/team building retreats; performance management; technical training)
  - Program Manager who manages and coordinates all programs, mentoring, and career development
  - Workforce Development Consultant – responsible for workforce development and succession planning, also helps with retreats, competency development
  - Cornell Interactive Theatre Ensemble – 1 director, 1 facilitator, ½ actor, ½ manager (remainder of time is an OD consultant)
3. **What kinds of services do you provided? (Types of projects, breakdown)**  
Leadership, Management, and Administrative development  
Retreats, Process Improvement, Special projects – Talent Management in Workday, Competencies, Policy management, technical training, survey development and administration, Training using theatre, 100% of financial and financial compliance training, Strategic planning and goal development/alignment, Performance Management, Conflict resolution, Coaching, Mentoring, Staff development, Experiential learning opportunities (rotations, shadowing, stretch assignments)
4. **What kinds of clients do you serve? (percentage academic/administrative)**  
25% academic, including strategy, planning, conflict resolution, leadership development and retreats...75% administrative
5. **Do you work with academic units? If so, doing what?**  
Retreats, leadership training, coaching, conflict resolution
6. **How do you get work? Request? Sent in? Who decides?**  
Requests come to Sr. Director and OD Consultants via email/phone and can come in through a website
7. **Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Formal alumni advisory committee from the College of Industrial and Labor Relations
8. **Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
No
9. **How are you organized administratively and connections in organization (reporting)?**  
Report to VP HR and CHRO

**10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**

We partner with College and Unit HR Directors and College and Business Officers and regularly vet new initiatives and programs with these people and constituents from their colleges. No formal evaluation of services except Leadership development courses (except new facilitators on projects and process improvement projects). Every three years I and two others talk with every Dean, VP, and their College/Business Director and HR director and anyone else they wish to invite to review their training and other needs

**11. How does professional development occur?**

Extensive including areas of leadership, job specific, effectiveness, academic development; Also eCornell, Lynda.com, Skillsoft

**12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**

Ivy Plus (all Ivy League Schools, Duke, Lehigh University, Michigan, Chicago, Davis, Berkeley, Northwestern); NCCI depending on the focus; Corporations – Google, Amazon, IBM, Booz Allan Hamilton and places where we have alums: we do a lot of work with these organizations as part of our review/evaluation of projects.

## Emory University, Bill Dracos

- 1. What is the name of your office/unit?**  
Business Practice improvement, University consulting Association
- 2. Number of people in office and basic roles**  
12 → modeled after consulting senior → staff; manager, Director; Chief officer; admin staff
- 3. What kinds of services do you provided? (Types of projects, breakdown)**  
Analytical tools, benchmarking and best practice, change management, efficiency design, financial forecasting and pro-forma construction, growth enablement, new venture development, operational improvement, problem solving, project management, qualitative and thematic analysis, quantitative analytics, service structure design, strategic business planning
- 4. What kinds of clients do you serve? (percentage academic/administrative)**  
Academic side 30% : strategic plan; Admin 70%
- 5. Do you work with academic units? If so, doing what?**  
Yes; Strategic planning → including all services related to academic side of house
- 6. How do you get work? Request? Sent in? Who decides?**  
Request mostly now (80%); before given by others (20%)
- 7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Survey all clients: 3 executives of university make up advisory board; Every project has executive committee
- 8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Yes, but not comprehensive/campus wide;
  - strategic planning office → Woodroff Health Care
  - Provost has strategic planning unit: Implement strategic planning – Big position and very academic (2 people)
- 9. How are you organized administratively and connections in organization (reporting)?**  
Report to Ex VP of Business and Admin
- 10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
After action review – don't do for all projects: Interview
- 11. How does professional development occur?**  
External "Scholars": consulting apprenticeship for 1 year with assigned coach, 3 classes (6, 9, 7 members); "Fellow": full time (2 fellows/year) for 2 years
  - Internal – encourage all 12 to get training; m3a School
- 12. What are top organizations like yours nationally whom you benchmark---who do you consider the "best of best"?**  
UW Madison; Georgia Tech; Berkeley
  - Big Firms: Huron, PWC, Accenture, Bain, Boston Consulting Group

## Northwestern University, Jake Julia

1. **What is the name of your office/unit?**  
Office of Change Management
2. **Number of people in office and basic roles**  
8 FTE → Assoc VP; Senior Dir 3 Directors; Change Management Admin; Project Coordinator (data gathering/analysis), admin support
3. **What kinds of services do you provided? (Types of projects, breakdown)**  
Facilitating organizational change – institution level, cross org boundaries process; structure; culture [specific see web]
4. **What kinds of clients do you serve? (percentage academic/administrative)**  
50%, 50%
5. **Do you work with academic units? If so, doing what?**  
Yes; in academic, teaching learning and research
6. **How do you get work? Request? Sent in? Who decides?**  
Top down Provost; Exec VP; Deans and VPs
7. **Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Composed of Deans, Faculty and staff → ¼ to Direct work and areas of emphasis
8. **Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Learning and org develop group – in HR: more focused within unit rather than cross over campus-wide
9. **How are you organized administratively and connections in organization (reporting)?**  
Dual report to Provost; Executive VP
10. **How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Advisory group = assessment mechanisms on individual projects (revised now)
11. **How does professional development occur?**  
Sign portion of budget to PD; WCCI; SCUP; “very important to recharge and reenergize ourselves”
12. **What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
UW-Madison

## Rutgers University, Brent Rubin

- 1. What is the name of your office/unit?**  
Center for Organizational Development and Leadership
- 2. Number of people in office and basic roles**  
6 FTE → 3 consultant, 2 Admin, 1 Faculty Fellow = part time faculty fellows=3, 3 staff assistants
- 3. What kinds of services do you provided? (Types of projects, breakdown)**  
List of services:
  - - Organizational Effectiveness – strategic planning; org assess; outcome measures; climate; org design and development, communication and change planning and assessment
  - - Leadership Advancement – portfolio of collaborative leadership programs, including the Rutgers Leadership Academy, PreDoctoral Leadership Development Institute, Academic Leadership Program, Distinction in Leadership in Academic Healthcare, Leadership at Lunch, and Big Ten Academic Alliance leadership collaborations
- 4. What kinds of clients do you serve? (percentage academic/administrative)**  
“Must have penetration in academic side to survive” 75% academic – 25% admin = Integrated, require cross cultural perspective; “hard to find a purely administrative challenge these days” = ‘if you loose credibility with academic side when you risk marginalizing yourself”
- 5. Do you work with academic units? If so, doing what?**  
Yes = see# 4
- 6. How do you get work? Request? Sent in? Who decides?**  
Senior levels, chancellors, vice presidents; director level and up
- 7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Don’t have formalized process; informal org. intelligence with ODL team @ regular mtgs. (continuous environmental monitoring) \*this function is key to success
- 8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Relationship building is key, Yes – HR (talent mgmt., training)
- 9. How are you organized administratively and connections in organization (reporting)?**  
Ambiguous, technically in HR – Org Eff; much of funding work is in academic affairs – sponsorship drives reporting
- 10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Solicit feedback from leader and standardize feedback from participants; website hits; one to one informal conversations with sponsors
- 11. How does professional development occur?**  
Cross training and cross work between consultants; attend professional meetings – auditing other professional development programs
- 12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
Carleton

## University of Michigan, Catherine Lilly

1. **What is the name of your office/unit?**  
Executive President, Chief Executive officer. 4 FTE, 6 students
2. **Number of people in office and basic roles**  
3 FTE full time, 1 ¼ time
  - Senior exec and project management
  - Admin
  - Cen coordinator
  - Senior advisor → strategist, cross functional org change, succession planning
3. **What kinds of services do you provided? (Types of projects, breakdown)**  
Strategic plan of org (metrics, planning, strategic plan dev), implementing LEAN, Employee satisfaction survey, Implementation of strategic plan, Strategic project/ policy advising [thought partner] → instigation → thought partner, “Org Muse”
4. **What kinds of clients do you serve? (percentage academic/administrative)**  
CFO; Assoc. Vice president; 20% left open for special projects; no responsibility campus wide (formally); Chancellor’s project (very large projects)
5. **Do you work with academic units? If so, doing what?**  
Mostly no unless special projects → Catherine yes as private consultant or special request
6. **How do you get work? Request? Sent in? Who decides?**  
Instigator 50% → tap into needs or aspiration; rain maker to help leaders articulate projects, 50% driven by strategic plan and duties in 3
7. **Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
No
8. **Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Student life function like mine; health system like me ; nothing on academic side
9. **How are you organized administratively and connections in organization (reporting)?**  
Report to CFO
10. **How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
CFO instigated annual 360 degrees performance mgmt. process; nothing formal
11. **How does professional development occur?**  
internships via students and debriefing; send people to cultural competency program; NCCI; believe in prof develop
12. **What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
UW-Madison – Maury C., Cornell – Kathy B., U of Washington – Ruth J, Georgia Tech – Org Design and Development

## University of Notre Dame, Carol Mullaney

- 1. What is the name of your office/unit?**  
Office of Continuous Improvement (OCI)  
Additional offices providing OD services: Office of Strategic Planning; Human Resources
- 2. Number of people in office and basic roles**  
3 FTE → Training, Coaching, Continuous Improvement, facilitating improvement sessions  
Director; 2 Consultants; ½ time admin  
(Strategic Planning – 3 FTEs; Human Resources Talent & Engagement – 3 FTEs)
- 3. What kinds of services do you provide? (Types of projects, breakdown)**  
Process Improvement: Lean Six Sigma – DMAIC; Green Belt certification on campus; build competence in Lean Six Sigma across campus. Change Management.
- 4. What kinds of clients do you serve? (percentage academic/administrative)**  
50% admin; 50% academic → admin functions that support academic side – College, libraries and research administration
- 5. Do you work with academic units? If so, doing what?**  
Yes but primarily in admin process improvementg.
- 6. How do you get work? Request? Sent in? Who decides?**  
Relationships – contacted by Depts, Divisions. Nomination process for Green Belt projects
- 7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Yes, Team Apex is advisory committee; Identity opportunities
- 8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Separate office of Strategic Planning and IR; some divisions have local expert in continuous improvement (black belt, green belt); Human Resources handles Leadership Development and Organizational Analysis and Design.
- 9. How are you organized administratively and connections in organization (reporting)?**  
Report to Executive VP – Campus Services Division
- 10. (Human Resources also reports to Executive VP; Strategic Planning reports to President)How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Team Apex; Training Surveys: admin unit review (every few years); Project work evaluation
- 11. How does professional development occur?**  
Black Belt training for all; Change Management certification; set goals for PD yearly; NCCI professional development opportunities; Creative Education Foundation (creativity insite facilitation); MoreSteam network
- 12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
UW-Madison, Penn State, Washington, Miami U of Ohio, Cornell

## **University of Virginia (Revised 8/2/17) (Sarah Collie)**

### **1. What is the name of your office/unit?**

Organizational Excellence

Organizational Excellence is an office, but also an institutional value. It is our institutional approach and philosophy to achieve a culture of quality and high-performance in support of our mission. It is carried out by all in the University community.

### **2. Number of people in office and basic roles**

Led by Associate Vice President, three consultants, a program communicator/coordinator, and an administrative specialist.

### **3. What kinds of services do you provided? (Types of projects, breakdown)**

The comprehensive program, which serves the entire University, has four components: 1) Institutional initiatives; 2) Project Alliance – coordination of major projects; 3) Consulting Services – provided upon request to schools and units; 4) Quality Communities – professional development and sharing of best practices.

The OE office plays different roles in the various major institutional projects – either leading or facilitating. OE leads the Project Alliance work to coordinate the portfolio of institutional initiatives – the interdependencies and synergies. OE is responsible for the design and delivery of quality and improvement professional development and leads all upon-request consulting engagements. OE is also engaged on an informal basis to guide, coach and mentor unit-led efforts.

Services include: benchmarking, change management, coaching and mentoring, group facilitation, metric development, organization design, portfolio management, process improvement, project management, stakeholder engagement, strategic planning and implementation.

### **4. What kinds of clients do you serve? (percentage academic/administrative)**

Both administrative and academic schools and units. While variable, our clients are distributed about 30-40% academic and 60-70% administrative areas.

### **5. Do you work with academic units? If so, doing what?**

Yes, Organizational Excellence offers our full slate of services to academic schools and units. For large institutional projects, we fulfill a key role in the facilitation and analysis of academic stakeholder needs, input, feedback, and engagement. For an individual school/academic unit, we offer an array of consulting services to assist them achieve their goals, including strategic planning and execution, activity prioritization, process and redesign.

### **6. How do you get work? Request? Sent in? Who decides?**

Institutional and organizational needs are collectively identified by leaders and the broader University community of faculty and staff (benchmarking, surveys, etc.). Institutional needs are vetted and prioritized by the OE Leadership Council and the OE Executive Sponsors. Units directly request consulting services and the OE office evaluates the alignment and impact of the request along with our capacity to deliver. Our consulting work comes to us in large part through referrals, as we do very little marketing and solicitation.

### **7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**

OE Leadership Council (15 people), comprised of T&R faculty, academic administrators (school dept. chairs, associate deans of management), general administrative leaders, and chaired by dean of an academic school.

**8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**

Academic strategic planning is the responsibility of the Provost Office. There is also an Institutional Assessment and Studies unit that is part of the Provost Office. We partner in this work in targeted ways upon request.

**9. How are you organized administratively and connections in organization (reporting)?**

Solid reporting line to the EVP/COO, but operational accountability to OE Executive Sponsors – EVP/COO, Provost, Senior Vice Pres. Ops. and OE Leadership Council. Also, OE gives a regular report to our Board of Visitors.

**10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**

Stakeholder feedback is embedded in each of the major projects. Further evaluation of the OE function is through a variety of methods - an annual stakeholder survey; a formal client survey at the close out of each of consulting engagements, and a participant survey of each of our professional development sessions. The Organizational Excellence Leadership Council also offers regular input and feedback to shape the overall program as well as individual projects.

**11. How does professional development occur?**

The OE team seeks out regular opportunities through NCCI, other related quality and improvement professional associations, and targeted educational opportunities (certifications, classes, etc.) Periodically, the OE office assesses our collective expertise and evaluates against organizational needs. In places, where there are gaps, we develop a plan to acquire the necessary skills and knowledge. OE also facilitates professional development for the entire university through survey sessions and workshops, communities of practice, and a scholarship and mentoring program. For our survey sessions, and workshops we tap into the applied expertise of UVA faculty and other external providers.

**12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**

UW-Madison, Michigan, Washington, Berkeley, UC-San Diego, Rutgers

## University of Washington, Ruth Johnston

- 1. What is the name of your office/unit?**  
Organizational Excellence
- 2. Number of people in office and basic roles**  
9.5 FTE : 4 on OD, (3.5 FTE), 1.5 metrics, 1 customer service, 1 OE specialist, 1 ass. UP director/consultant, 1 Admin staff.
- 3. What kinds of services do you provided? (Types of projects, breakdown)**  
Business plan development, change management, conflict resolution, metrics, analysis and reporting, organizational assessment, design and structures, process improvement (including Lean), project management, retreat facilitation, strategic planning.
- 4. What kinds of clients do you serve? (percentage academic/administrative)**  
50% - 50% Academic / Admin → faculty
- 5. Do you work with academic units? If so, doing what?**  
Strategic planning, process improvement, retreat facilitation, metrics
- 6. How do you get work? Request? Sent in? Who decides?**  
Requested; imposed by others; sometimes-transforming admin team; Ruth decides [could be more strategically align items of projects]
- 7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Transforming admin team; → sustainable business plan → corporations / programs → other
- 8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Sustainable academic business plan (SABP) → take lead from them they farm out SP projects to various units schools and colleges and units also have OD consultants
- 9. How are you organized administratively and connections in organization (reporting)?**  
Report to EVP Finance and Administration→ historically Provost and senior Vice President
- 10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
After project evaluations; OE forums = 100 people from across campus; OE showcase → 6 am coffee group; Org change group
- 11. How does professional development occur?**  
Each person on staff has org develop plan
- 12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
UW-Madison [Belmont, Rutgers (Ruben)], Cal State System, Berkeley, Cornell

## University of Wisconsin-Madison, Darin Harris

- 1. What is the name of your office/unit?**  
Office of Quality Improvement
- 2. Number of people in office and basic roles**  
11, including: Director, 7 consultants, 2 admin staff, and one student employee
- 3. What kinds of services do you provided? (Types of projects, breakdown)**  
Strategic Planning, Organization (re)Design, Change Management, Meeting Design and Facilitation, Launching Campus-Wide Initiatives, Project Management, Networking and Learning Opportunities, Best Practice Dissemination, Data for Decision Making, Streamlining Processes.
- 4. What kinds of clients do you serve? (percentage academic/administrative)**  
40% admin; 60% academic
- 5. Do you work with academic units? If so, doing what?**  
Yes in all service areas.
- 6. How do you get work? Request? Sent in? Who decides?**  
By request via Deans/Directors and on per client basis
- 7. Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
No.
- 8. Are there other offices or people in your institution with responsibilities for strategic planning or working in academic units on planning or improvement work?**  
Separate office of IR; Formal Office called Administrative Process Redesign that does campus-wide administrative projects using Lean/Six Sigma; some divisions have local expert in strategic planning and continuous improvement (black belt, green belt).
- 9. How are you organized administratively and connections in organization (reporting)?**  
Report to Provost and part of the Provost Office.
- 10. How do feedback, management, and stakeholder interaction happen? Do you have an advisory committee to provide input or counsel to you – formal or informal?**  
Separate client reviews of projects take place at the end of each project via consultant; yearly review of projects during Dean/Director retainer meetings.
- 11. How does professional development occur?**  
All employees receive professional development via a yearly plan reviewed and overseen by the Director as part of the performance review process.
- 12. What are top organizations like yours nationally whom you benchmark---who do you consider the “best of best”?**  
Rutgers, University of Washington, Cornell, Notre Dame, Northwestern, Emory