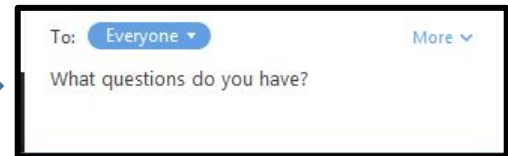
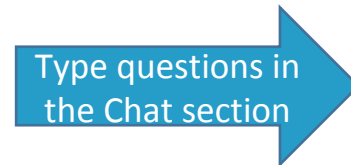
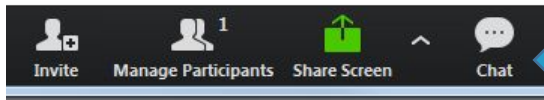




# Thank you for joining us today!

- **To ensure the effectiveness of this web meeting:**
  - Only the host and presenters will be unmuted.
  - All other participants will be muted during the presentation.
  - View settings can be adjusted by clicking on the navigation bar above the video or by dragging and placing the video on the lower right corner of the screen.
- **We encourage and welcome your questions!**
  - Please use the Zoom Chat function to submit questions.
  - At set breaks, questions will be addressed by the presenters.



# Becoming a Transformation Catalyst

Thoughts about Taking your CI/Lean/PI/Internal Consulting  
Team to the Next Level



NCCI Power60  
December 8, 2020

# SESSION LOGISTICS

- During the session, please feel free to ask questions or add comments in the chat
- Please remain muted unless asking a questions to ensure audio remains clear for others to hear clearly
- Contact information for all presenters will be provided at the end of the Power60



# Agenda

1. Introductions
2. Overview of different types of CI/Lean/PI/Internal Consulting teams
3. Program Examples - Panelists
4. Questions and Next Steps



# Who is Transforming Solutions?

Transforming  
Solutions Inc  
people - process - technology



[www.transforming.com](http://www.transforming.com)



# Who is Transforming Solutions?



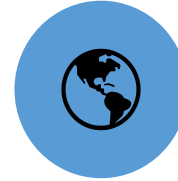
STARTED IN 1995 TO  
HELP  
GROWTH-ORIENTED  
COMPANIES



PEOPLE, PROCESS, AND  
TECHNOLOGY



12 YEARS IN HIGHER  
EDUCATION



CHICAGO-BASED WITH  
GLOBAL CLIENTS



25+ EXPERIENCED  
CONSULTANTS



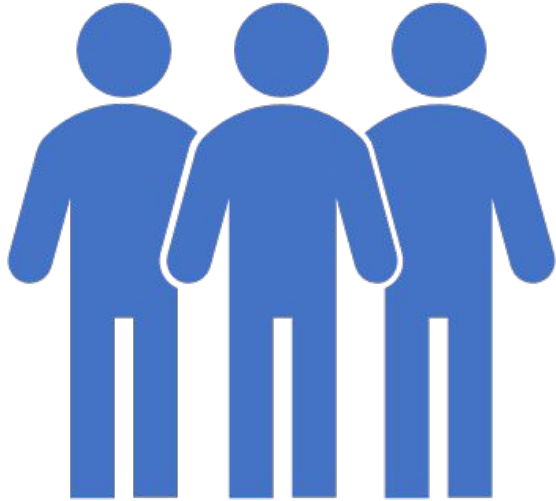
TECHNOLOGY  
AGNOSTIC



SUSTAINABLE, RESULTS  
FOCUSED, PRAGMATIC  
SOLUTIONS



# Higher Education Consulting Services



- Administration & Finance
- Advancement
- Athletics
- Enrollment & Student Experience
- Information Technology
- PMO, Lean, Continuous Improvement Teams
- Research Administration



# Clients



Ivy League University  
(restricts the use of their logo)



Northern Illinois  
University

ILLINOIS STATE  
UNIVERSITY

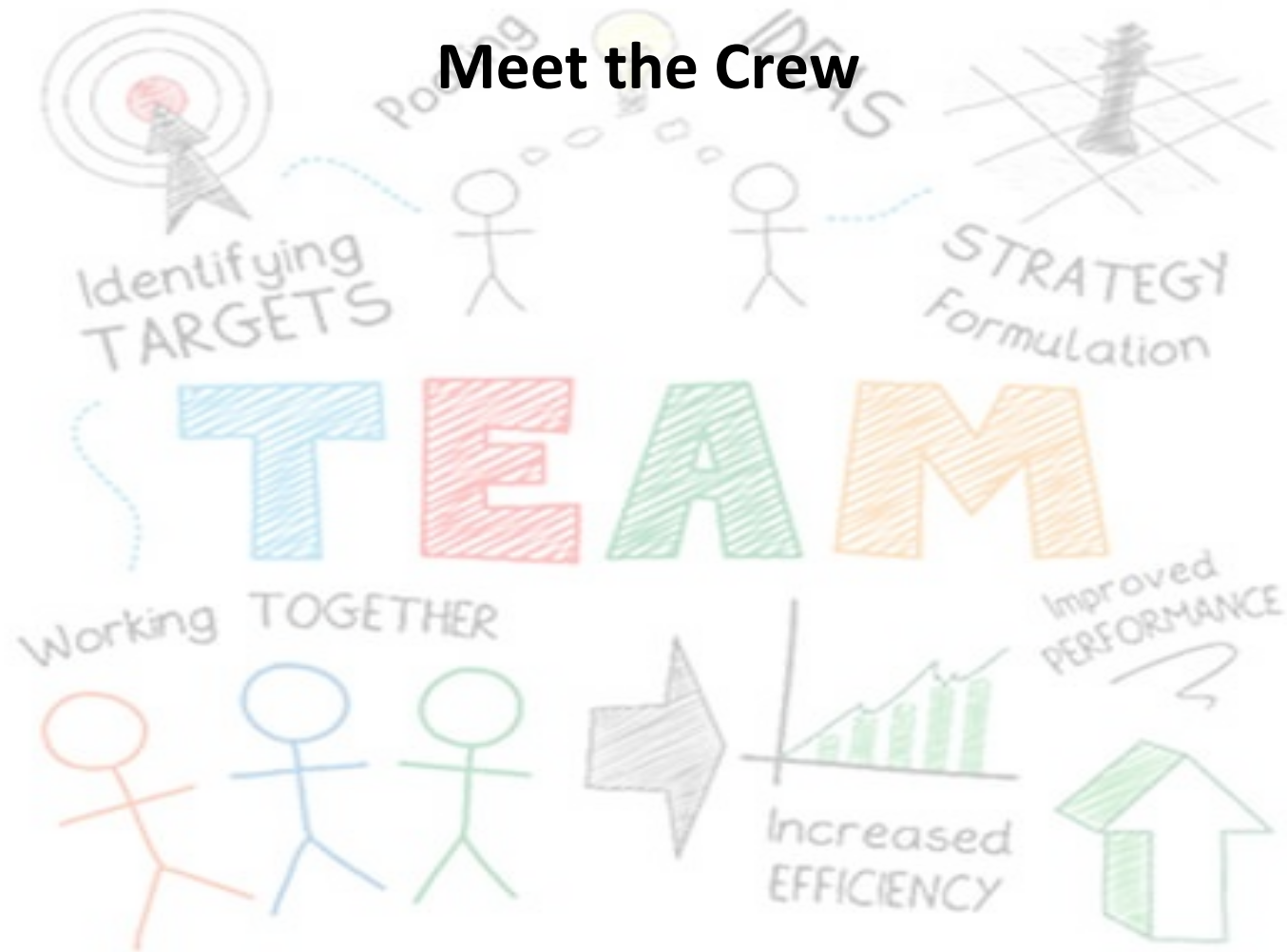




# Clients



# Meet the Crew





# Dan Feely

President and Founder,  
TSI



- 30+ years of business transformation, technology strategy, process improvement and OCM experience
- Unique blend of experience in Higher Education and Corporate
- Started career at Andersen Consulting (now Accenture)
- Launched TSI in 1995
- BS in Operations Management and Information Systems, Northern Illinois University

# Dr. Karla Loebick

## Consultant



Experienced consultant with 20+ years experience focused on:

- Voice of the Customer and Customer Experience
  - Organizational and cultural change management
  - Process improvement
  - Project Management
  - Teaching and learning - training
  - International education
  - Software evaluation and selection
  - Requirements identification and prioritization
- PhD in Higher Education Administration from Michigan State University; Masters of Education from The Ohio State University; BA in Business Administration, International Studies, and Spanish with minor in Economics from Baldwin Wallace University



# Dr. Sarah L. Collie

Associate Vice President  
Organizational Excellence  
University of Virginia



- Lifelong educator with 25+ yrs experience in higher education
  - Diverse experiences by role - academic programs and administrative services
  - Different types of institutions - regional, research U, public, private
- Progressive career at UVA since 2004
- Designed and launched UVA Organizational Excellence in 2013, part of strategic plan, builds upon Process Simplification program established in 1994
- Ph.D. in Higher Education/Organizational Change
- Member of NCCI since 2004 – invaluable resource for professional growth – thought partners, mentors, collaborators



# Amy Haberman

Assistant Director  
Office of Continuous  
Improvement  
University of Florida



- Transitioned into Continuous Improvement in 2019 after 15 years as an Environmental, Health and Safety Professional.
- Currently pioneering the efforts to foster a culture of continuous improvement by leading university-wide business process improvement initiatives.
- Lead the Collaboration for Continuous Improvement (CCI), a cross-functional team of six staff (**volunteers in other roles, not direct reports**) to advance the culture of continuous improvement at UF.
- Use collaborative innovative approaches to increase efficiencies, enhance teamwork and provide better customer service.

# Dr. Sonia Alvarez-Robinson

Executive Director  
Strategic Consulting  
Georgia Tech



Leads internal team of organizational effectiveness consultants at Georgia Tech since 2014

Leads resilience employee resource group and teaches short course for students on Building Resilience: Overcoming Acute Shocks and Chronic Stressors

Prepared for today through past experiences including:

- Director in PwC's global consulting practice
- Director of strategy for Georgia public health dept
- Director of distance communication and learning for MN Dept of Health
- HR manager at Cummins Power Generation
- Director of diversity and inclusion, MN Dept of Health
- Certified Mediator, MN Supreme Court
- EEO Officer, US Dept of Housing & Urban Development

PhD in Human and Organizational Systems with MA in Human Development

Mentors and coaches people through life transitions





# Your Turn - Using CHAT - Please sign in Chat!



\*Your name

\*Your institution

\*Your role

\*A word that describes your mood or feeling





# Overview of Types of CI, Lean, PI, and Internal Consulting Teams



Goal

Marketing!

Partner

# Evolution



How it started



How it's Going?

# Organizations can Vary by....



Goal

Marketing!

Partner

# Types of Organizations - PMI

- Organizational PMO
- Project support services
- Enterprise PMO
- Center of Excellence
- Project Specific PMO



# Types of Organizations - Gartner

- The Activist PMO
- The Delivery PMO
- The Compliance PMO
- The Centralized PMO



# Epic Panelists of NCCI Members/Leaders

- Office Overview and journey in terms of services
- What does their group focus on?
- Who does your group report to? (Sponsors?)
- What types of projects/work does your group focus on?
- What successes have you achieved? (results and breakthroughs)





# Program Example 1

## Sarah L. Collie

### University of Virginia



Organizational Excellence



Resource to support the University's priorities, enable core missions, advance the strategic plan.

- Enhance organizational **effectiveness** and **efficiency**
- Improve **processes and services** to enable teaching, research and service
- Foster a **culture** of excellence, collaboration, and innovation

High Performance (value, results) / Service-orientation / Continuous Improvement  
Organizational Capacity for Change / Resource Alignment and Optimization

### Scope and Approach:

- *Partner* all across University
- Key Services: *Strategic and Operational Planning, Process Improvement, Org. Effectiveness, Project/Change Mgmt*
- Core principles and *flexible, varied methodology and tools*
- *Build organizational capacity* through developing individuals' practical knowledge and skills

### Structure:

Leadership Council – diverse group of faculty leaders, school-based leaders and administrators, central services  
Executive Sponsors – EVP/COO and Provost  
OE Team



### University-wide Initiatives

- COVID-19 Response and Reopening
- Capital Project Process Improvement
- Faculty Annual Reporting
- Sustainability
- Research Administration
- Human Resources Redesign
- Strategic Sourcing

### Local School/Unit Initiatives

- Curriculum Redesign academic depts - Center for Teaching Excellence
- Strategic Planning and Implementation – (e.g. School of Engineering, Dept of Safety and Security)
- Interdisciplinary Research Collaborations
- Organizational Effectiveness (e.g. Library, program)

### External Partnerships

- Charlottesville Regional Chamber of Commerce
- Virginia Research Libraries
- UVA Foundation
- State-wide H.Ed. Innovation/Efficiency Conference

### Quality Communities

*Connect, Collaborate, Learn*

- **Quality CORE Network**  
short monthly sessions on topics – org. change, innovation, facilitation, improvement, high-performance
- **Immersive Workshops**  
Liberating Structures, Prosci Change Management, Project Foundations
- **Communities of Practice**
- **Resources and mentoring**



# Program Example 2

## Amy Haberman

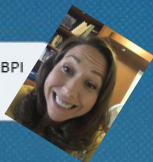
**UF** | Office of the Vice President  
and Chief Financial Officer  
*Continuous Improvement Office*  
**UNIVERSITY of FLORIDA**





VP Partnership -  
Commitment to "Lean"

Assistant Director of BPI  
Joins



Jan.–June 2019

Aug.–Sep. 2019

Jan. 2019

May 2019

6 Staff trained  
6 Processes being improved

Rebranding to Continuous  
Improvement

# FROM CURRENT STATE TO FUTURE STATE

PROPOSED CHANGES RESULT IN:

**-39 ACTIVITIES**

From 58 to 19 activities/  
process steps



**DECISIONS -15**



From 16 decisions  
to 1 decision

**91% TO 58% MANUAL**

From 53 to 11  
manual steps



**AUTOMATED**

**8% TO 42%**



From 5 to 8  
automatic steps

**-6 HANDOFFS**

From 19 to 13 handoffs  
in the process



**TEAMS / SYSTEMS -3**



From 7 to 4 team /  
systems involved



— COLLABORATION FOR —  
CONTINUOUS IMPROVEMENT



Processing  
Emergency  
Payroll Checks

Hiring Foreign  
Nationals

Auxiliary  
Billing Process

Expanding the  
UF Alert  
Program

Establishing  
FMLA Process

Improving  
Reporting for  
Fund 143



# Program Example 3

## Dr. Sonia Alvarez-Robinson





### 2020 Goals – In Revision for 2021

1. To lead the engagement of the GT community in developing and implementing the Georgia Tech strategic plan.
2. To make measurable contributions to student success and wellbeing.
3. To contribute to the success of Institute-wide priorities and investments through core organizational effectiveness services.



### Building Organizational Capacity

- Developed toolkit for Strategy Development and Implementation
- Configured system to curate and analyze all strategic plans
- Developed toolkit for Process Optimization and trained staff
- Held Project Management Networking Forums
- Partnering with GT Professional Education on courses

### Core Organizational Effectiveness Services



Organizational Review



Strategy Development and Implementation



Organizational Readiness and Change



Organizational Design and Development



Project and Portfolio Management



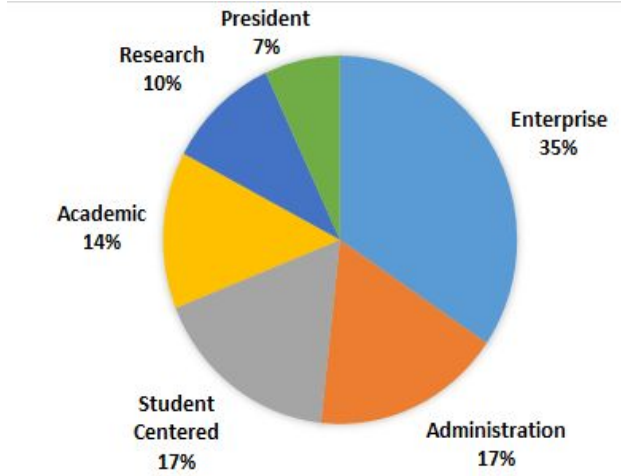
Process Optimization



Culture and Engagement



## Metrics that Matter



We measure how much ...

One Kaizen event delivered a new process

- 49% fewer steps
- 71% fewer decision points
- 63% fewer handoffs
- 75% fewer loopbacks
- 80% fewer intake points

In addition, the process's reliance on paper was completely eliminated. The team implemented several "quick-win" improvement opportunities immediately after the Kaizen event.

And how well ...

*"Stacy and Andrew did a fantastic job facilitating this project! They provided leadership and direction and accepted feedback and guidance from the participants."*


*"GTSC helped us broaden our thinking and stay on task. The waste elimination exercise was very helpful!"*

- 29 currently active projects
- Recovered 274% of our salaries last year
- Avoided more than \$3M in external consulting fees
- Average utilization 120%
- Committed to continuous improvement

<https://strategicplan.gatech.edu/>

# Questions



- 
- 1. How has 2020 changed what you are working on, how you are working?**
  - 2. How has your organization evolved over the time**
  - 3. What challenges are on your horizon?**
  - 4. What obstacles have you overcome?**
  - 5. Given where we are within higher education and the challenges that your team is asked to help address, what do you wish that you could go back in time and address?**
  - 6. Do you have any advice you could give to others that may be in an earlier phase of development?**
  - 7. In terms of recent institutional responses to COVID-19, how has your office adapted and leaned into needed changes? How have you evolved to accommodate this response?**
  - 8. Other Questions - From the attendees?**







Links:

<https://www.gartner.com/smarterwithgartner/4-types-of-project-management-offices-that-deliver-value/>

<https://www.pmi.org/learning/thought-leadership/pulse/pmo-frameworks>



Goal

Marketing!

Partner

# Let's Continue the Conversation!

Interested in learning more about Transforming Solutions or our services?

[www.transforming.com](http://www.transforming.com)

Dan Feely - [dfeely@transforming.com](mailto:dfeely@transforming.com)

Dr. Karla Loebick - [kloebick@transforming.com](mailto:kloebick@transforming.com)

Keep in contact with our panelists:

Sarah L. Collie - [scollie@virginia.edu](mailto:scollie@virginia.edu)

Amy Haberman - [ahaberman@ufl.edu](mailto:ahaberman@ufl.edu)

Sonia Alvarez-Robinson - [sonia@consulting.gatech.edu](mailto:sonia@consulting.gatech.edu)





# Thank you for joining us today!

An evaluation survey for today's webinar has been sent via email. We greatly appreciate your feedback!  
This recording will be available in NCCI Connect next week.



### Presidential Perspectives: Looking Back, Looking Ahead

Tuesday, January 26, 1-2 p.m. Eastern

In this first Thought Leaders Roundtable, Dr. Ralph Gigliotti, NCCI Board Member and Director of the Center for Organizational Leadership from Rutgers University, will moderate a discussion with the featured presidential panelists from our 2020 virtual annual conference. Dr. Mark Becker (President, Georgia State), Dr. Ángel Cabrera (President, Georgia Tech), and Dr. Cynthia Teniente-Matson (President, Texas A&M University-San Antonio) will reflect on leadership lessons learned based on the challenges from this past semester and offer considerations regarding the future of higher education in a post-pandemic society. Building upon the themes discussed at the 2020 NCCI annual conference, this virtual roundtable will be relevant for those interested in change, innovation, and leadership across the higher education landscape.



Dr. Ángel Cabrera, President,  
Georgia Institute of Technology



Dr. Cynthia Teniente-Matson,  
President, Texas A&M University-  
San Antonio



Dr. Mark Becker, President,  
Georgia State University



Dr. Ralph Gigliotti, Director,  
Center for Organizational  
Leadership, Rutgers University