Operational Excellence Program Update
Community Forums - Fall 2017

Program Co-Sponsors:
Provost Nancy Brickhouse, PhD
CFO David Heimburger

Program Team:
Eric Armbrecht, Ph.D. – Co-Leader
Libby Gallogly – Project Manager
Doug Williams, J.D. – Co-Leader
Justin Daffron, SJ – Growth
Clayton Berry – Communications
Brianne Burcke – Finance
About

What is the Operational Excellence Program?
Operational Excellence is an institution-wide initiative designed to make SLU more efficient and effective, and identify opportunities for increased revenue and growth – all to enable the priorities identified in the University’s strategic plan.

Project website: www.slu.edu/operational-excellence
Fall 2017 Priorities

1. Tracking value and adherence to Optimal Structure and Academic Reinvention plans

2. Launching new initiatives with revenue growth impact:
   • Student Fees
   • Residence Hall Occupancy
   • Industry Partnerships

3. Advancing progress on established initiatives

4. Facilitating small, rapid changes in processes to free up staff/faculty time (aka, “ways of working”)

5. Supporting growth plans developed by Deans and Provost

6. Engaging the SLU community through open communication and many opportunities for input
Having finished the largest cost savings initiatives in FY17, we focus on revenue growth and process improvement in FY18.

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<tr>
<th>FY17</th>
<th>FY18</th>
<th>FY19+</th>
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<tr>
<td>60% of value</td>
<td>80% of value</td>
<td>100% of value</td>
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### Revenue
- Sponsored programs
- Undergrad yield
- Summer enrollment
- Industry Partnerships
- Fees
- Residence hall occupancy
- Graduate pricing

### Cost
- Organizational redesign
- Academic reinvention
- Utilities
- Facilities
- Procurement

### Process
- Travel
- Budget model redesign
- Student advising
- Ways of working
- Graduate admissions
- Hiring
- Facilities processes

### Ongoing value tracking & implementation support
How Operational Excellence works for you

Pre-launch: OE Co-sponsors (Provost and CFO) define project scope/goals and select Initiative Team (co-sponsors, project manager, team members)

Phase 1: Initiative Team analyzes data, gather stakeholder/community input, identify solution options (and risk mitigation)
  • OE Co-sponsors (Provost and CFO) recommend solution(s) to Dr. Pestello
  • Dr. Pestello advances solution(s) to Phase 2

Phase 2: Initiative Team develops implementation plan (how/when to make the solutions happen)
  • OE Co-sponsors (Provost and CFO) recommend to Dr. Pestello
  • Dr. Pestello approves implementation plan

Phase 3: Implement, evaluate and track/report progress

This is the general framework. We use variations.
Status of selected initiatives (as of November 1, 2017)

- **Sponsored programs**
  - Design: Not yet launched
  - Implementation: Pre-Launch
  - Execute and track results: Phase 1

- **Undergrad yield**
  - Design: Pre-Launch
  - Implementation: Phase 1
  - Execute and track results: Phase 2

- **Fees**
  - Design: Phase 1
  - Implementation: Phase 2
  - Execute and track results: Phase 3

- **Residence hall occupancy**
  - Design: Phase 1
  - Implementation: Phase 2

- **Travel**
  - Design: Phase 1
  - Implementation: Phase 2
  - Execute and track results: Phase 3

- **Budget model redesign**
  - Design: Phase 1
  - Implementation: Phase 2

- **Student advising**
  - Design: Phase 1
  - Implementation: Phase 2

- **Facilities**
  - Design: Phase 1
  - Implementation: Phase 2

Rapid Results Teams
Operational Excellence Program Team Values

• **Co-produced solutions**
collaboration-based approach to identifying ways to improve

• **Transparency**
clear, open communication and freely sharing information with the community

• **Enthusiasm**
excitement and joy for work, mission and people

• **Persistence**
manage through challenges and make modifications that deliver results

• **Generosity**
give time, data, and expertise to collaborators

• **Trust**
believe in the ability, reliability, goodwill and words of others

• **Humanness**
appreciate the humanity and differences of others, living by *Cura* standards

• **Gratitude**
express appreciation for others’ expertise and contributions to excellence

• **Understand details**
obtain enough data for thorough view of problems and solutions

• **Listening**
enable ideas from diverse perspectives to influence process and solutions
Remember why we do what we do.
Questions?
Solutions?
# 2017-2018
## Operational Excellence Program Steering Committee Roster

1. Steve Buckner, Ph.D. (A&S: Chemistry)  
2. Kevin Carr (Information Technology)  
3. Daniel Carter, Student Government Association  
4. Ruth Evans, Ph.D. (A&S: English)  
5. Jay Haugen (Registrar)  
6. Mona Hicks, Ph.D. (Dean of Students)  
7. Mark Higgins, Ph.D. (Dean, Business)  
8. Ana Kent, Graduate Student Association  
9. Debra Loman, Ph.D., APRN (Nursing)  
10. Mickey Luna, J.D. (VP Human Resources)  
11. Robert Murphy, DPT, SJ (Campus Ministry and Doisy College)  
12. Doug Rush, J.D., Ph.D. (Faculty Senate President, School of Education)  
13. Lauren Schwarz, Ph.D. (Medical School)  
14. Jonathan Smith, Ph.D. (Chief Diversity Officer)  
15. April Trees, Ph.D. (A&S: Communications)  
16. Danielle Uy, J.D. (General Counsel)  
17. Mardell Wilson, Ed.D. (Dean, Doisy College)  
18. Cyn Wise (Office of Research)  
19. Gary Whitworth (Medical School, Finance)

### Program Co-Sponsors:
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- CFO David Heimburger

### Fall 2017 Meeting Dates
- Aug 5  
- Sep 19  
- Oct 17  
- Nov 16  
- Dec 5

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- Clayton Berry – Communications  
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Note: Bill Kauffman (President Office Chief of Staff) and Stacey Barfield (Assistant Provost) are invited to SteerCo meetings. Initiative project managers and co-sponsors attend meetings, as needed.
Other universities have established programs, offices or teams to support change management – academic and administrative..and more
What is the Budget Model Phase 2 addressing?

**Unspent funds carryover**
- Create retention and carryover policy for portion of the unspent funds held in unit.

**Spend management**
- Increase budget/spending flexibility
- Streamline spend mgt. approval processes
- Build a culture of trust and effective communication

**Indirect cost recovery**
- Incentivize faculty to pursue sponsored projects
- Reinvest indirect recovery dollars in ways that will maximize research enterprise growth

**Revenue distribution**
- Expand RCM-like revenue incentives in high priority areas, considerations for summer session and non-credit continuing ed
Community Forums, Meetings, and Initiative Planning Input

1. Initiative Planning Input Sessions and Focus Groups

   A. Student Advising
   • 7 community forums (students, faculty and staff) and 3-4 student focus groups (Sept 15 – Sept 29)

   B. Other Initiatives (Student Fees, Sponsored Programs, Budget Model Phase 2, etc.): TBD, based on workplans

2. Student Government Association and Graduate Student Association

3. Operational Excellence Program Overview and Open Discussions
   • beginning November and continuing through May
   • open to all faculty, staff and students

4. Faculty Assembly Meetings and School/College/Department Meetings
   • We are available. Tell us when. We will be reaching out to Faculty Assembly presidents and deans next week.

5. Other
Magis Strategic Plan is origin of Operational Excellence Program

1. Initiative Five: Fostering a Culture of Excellence, Effectiveness, and Efficiency Deeply Rooted in Our Institutional Mission and Catholic, Jesuit Values

Perhaps the most consistent theme heard in the process that has led to this plan is the broad-based commitment to the Saint Louis University mission expressed by students, faculty, and staff. This commitment sets a high bar for institutional behavior in every aspect of its operations. It challenges us to become the campus community our mission calls us to be—open and participative in decision-making, fair and ethical in how we treat one another, respectful of the environment that surrounds us, and careful in our stewardship of the resources provided to do our work. Mission matters—in everything we do.

2. Culture of excellence, effectiveness and efficiency....rooted in our mission and Catholic, Jesuit values

3. Open and participative in decision-making...fair and ethical in how we treat one another

3. Careful in our stewardship of resources
Initiative Four: Being an Innovator and Entrepreneur in All That We Do

Saint Louis University strives to challenge assumptions, reframe problems, and advance trendsetting methods, including innovative systems of instructional design and program delivery. Although our primary modes of educational practice proceed from our being a residential Catholic, Jesuit research university, we embrace transformational changes that have the potential to facilitate the learning of current students and assist the University to extend high-quality, accessible higher education to future generations and into new educational markets. We are similarly committed to expanding the University’s socially responsible entrepreneurial reach on behalf of the institution, members of the SLU community, and humanity.

1. Challenge assumptions, reframe problems and advance trendsetting methods...

2. We embrace transformational changes...