



# UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN



## 2009 BUSINESS LEADERSHIP CONFERENCE

**ENHANCING ORGANIZATIONAL EFFECTIVENESS THROUGH  
GOAL SETTING, PROCESS IMPROVEMENT AND  
PERFORMANCE MANAGEMENT**

March 17, 2009

*Business Leadership at Illinois: Collaborating for a Brilliant Future*

# Please ...

- Turn off cell phones.
- Avoid side conversations.
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.
- Participate.

# Workshop Presenters

- Barb Geissler  
Assistant Dean, Administration & Finance,  
College of Education  
[bgeissle@illinois.edu](mailto:bgeissle@illinois.edu) 244-3386
- Monica Miller  
Assistant Director, Head, Biological Safety  
Section, Division of Research Safety  
[mamiller@illinois.edu](mailto:mamiller@illinois.edu) 244-9585

# Performance Planning Experience

Barb –

ILRDC (non-profit)

- participant in teambuilding process
- Development of mission/vision

College of Education

- Initiated business improvement process

# Performance Planning Experience

Monica -

## DowElanco Performance Management System

- Training in goal writing, team building, work styles etc.
- Performance Plans for teams & individuals
- Extensive year-end evaluation process

## Division of Research Safety Strategic Planning

- Series of retreats in conjunction with OVCR strategic planning
- Focus on creating Mission/Vision and identifying “what we do and why”

# Workshop Objectives

- Identify how strategic planning can improve your work processes
- Create goals that are specific, measureable and time bound
- Obtain planning templates and examples
- Understand how planning impacts performance
- Leave with a plan in mind

# General Benefits

- Promotes focus and alignment with core values
- Provides a comprehensive accounting of what you do
- Assists in planning and prioritization
- Produces meaningful data for evaluation of people and programs

# Benefits to You

## Managers of functions

- Improve efficiency, relevancy, prioritization and success

## Managers of people

- Build and engage the team

## Self-management

- Evaluate performance, tell the story of what you do



# Our Approach

- Descriptive not prescriptive
- Looking at the tip of the iceberg
- Experts in the content area; not organizational consultants
- Inspire, not direct
- Suggestions for managing processes based on experience not just concepts

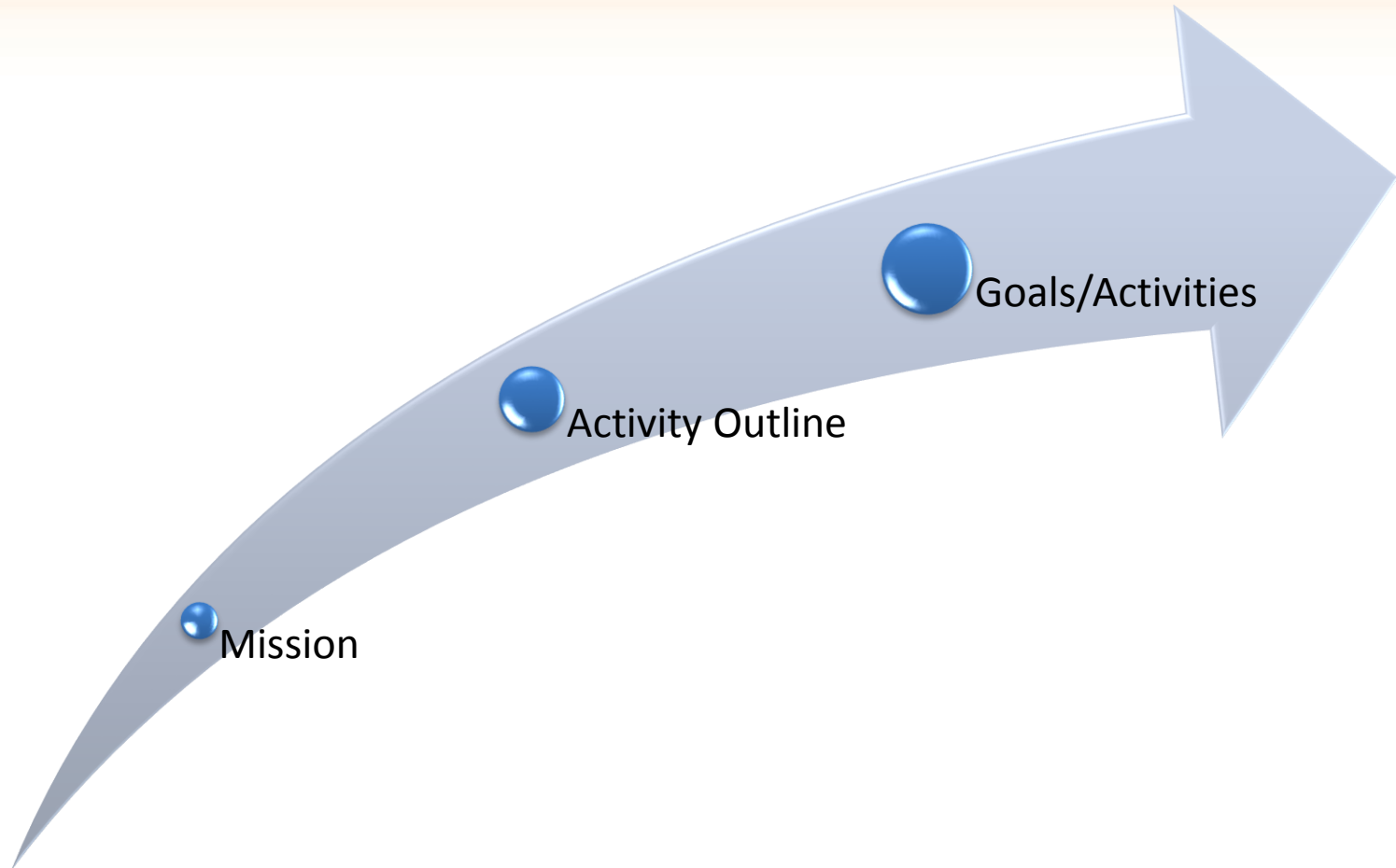
# Performance Planning Process



# Discussion Topic 1: Mission

- How many of you work in a unit with a written mission statement?
- How many of you know your unit's mission (written or unwritten)?
- Define mission – what does it represent for you?

# Outline and Align



# Activity Outline



“What would you say...ya do here?”

Bob Slydell, Office Space

- Organize your activities into meaningful categories  
e.g. programs, work functions, common objectives
- This may require creating a hierarchy of activities

# DRS Core Focus Areas

1. Hazardous waste collection and disposal
2. Regulatory compliance
3. Database development
4. Consultation & awareness/education

# Activity Outline

Functions and programs are placed within focus areas

<b>BSS 2009 Goals</b>	
<b>DRS Core Focus - Hazardous waste collection and disposal</b>	
<a href="#">Biowaste</a>	Maintain biomedical waste collection and disposal
	Maintain pathologic waste collection and disposal
	Evaluate and improve waste collection and disposal
<b>DRS Core Focus- Regulatory compliance</b>	
<a href="#">Incidents</a>	Respond and provide support for campus incidents
<a href="#">Select Agent</a>	Monitor SA rule changes and regulations
<a href="#">IBC</a>	Institutional Biosafety ensure that all compliance requirements are met
	The IBC research program ensures that all biological materials are handled in accordance with applicable compliance requirements
	The IBC research program ensures that all biological materials are handled in accordance with applicable compliance requirements
<a href="#">BBP</a>	Manage and maintain biological safety cabinets
	Improve BBP program
<a href="#">Biosafety Cabinets</a>	Maintain current biosafety cabinets
<a href="#">Shipping</a>	Improve compliance with regulations for transport of biological materials
<b>DRS Core Focus - Database Development</b>	
<a href="#">Dbase</a>	Contribute to current database development
<b>DRS Core Focus - Consultation &amp; Awareness/education</b>	
<a href="#">Biosafety information and training</a>	Provide Biosafety-related information and training
	BSS Staff development

# Activity Outline

<u>IBC</u>	Institutional Biosafety Committee (IBC) administrative functions are coordinated to ensure that all committee responsibilities are met in a timely manner
	The IBC research project review process is conducted to ensure that work with biological materials requiring oversight is conducted safely and meets all applicable compliance requirements
	The IBC research review process is improved through the development of tools and procedures which improve efficiency and assist the University in meeting oversight responsibilities

Activities within  
functions/programs are divided  
into goals



# Activity Outline

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functions/programs are divided  
into goals

# Goal Setting

- Goal = statement of intended future results
- Task = action to fulfill goal



# Smart Goal Setting

**Specific**

**Measurable**

**Achievable** (attainable, action-oriented)

**Relevant** (realistic, results-oriented)

**Time-bound** (trackable, tangible, time-limited, time line)

# Specific

- Clear, unambiguous, well-defined
- Sets scope – tells what is expected

*Reduce costs*

vs.

*Reduce state funds expenditures*



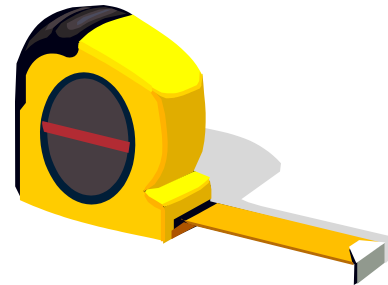
# Measurable

- Establish concrete criteria for measuring progress and defining success
- Assist in determining if result is achievable

*Reduce state funds expenditures*

vs.

*Reduce state funds expenditures by 5% from the prior fiscal year*



# Achievable



- Limitations are identified
- Necessary resources are available
- Possible to accomplish
- Success is likely

*Reduce state funds expenditures by 50%  
from the prior fiscal year*

vs.

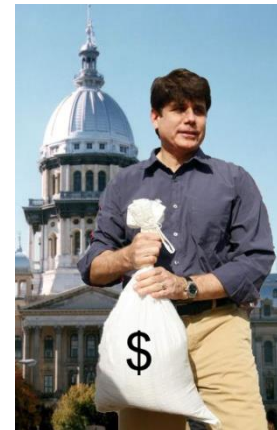
*Reduce state funds expenditures by 5%  
from the prior fiscal year*

# Relevant

- Leads to the intended result
- Aligned with the Mission and unit goals
- Important to the organization

*Reduce state funds expenditures by 5%  
from the prior fiscal year*

Does your unit have state funds?



# Time-bound

- Specific time frame or completion date
- Critical in goal prioritization and staging
- Assist in determining if result is achievable
- Promotes accountability

*Reduce state funds expenditures by 5% from the prior fiscal year by the end of the current fiscal year*





# Formulate a SMART Goal

Choose 1 topic from the list:

- Financial transaction processing
- Appointment processing
- Training
- Topic of your choice





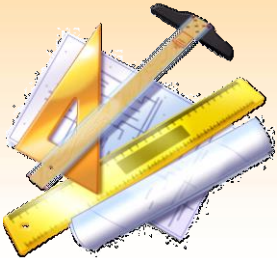
# From Goals to Actions

- What steps are necessary to achieve the goals?
- Who is responsible for these tasks?
- How will you track task completion?
- How do you ensure accountability?

# From Goals to Actions

Institutional Biosafety Committee (IBC) administrative functions are coordinated to ensure that all committee responsibilities are met in a timely manner				
TASK	TARGET DATE	STAFF LEAD	STATUS	COMMENTS
Develop yearly meeting schedule and timelines for submissions/reviews	Aug-09	TM	Not Started	
Coordinate printing/organizing handouts for monthly meetings	Dec-09	TM	Ongoing	
Maintain IBC webpage to reflect current deadlines, meeting times/locations etc.	Dec-09	TM	Ongoing	
Assist chairs/VCR with membership recruitment and invitations	Aug-09	TM	Not Started	Assist with meeting with the IBC chairs to select the committee for the 2009-2010 term.
Create an agenda and record minutes for each monthly meeting	Dec-09	TM	Ongoing	
Prepare annual IBC report for VCR	Jul-09	TM	Not Started	
Prepare annual NIH report	Nov-09	TM	Not Started	
Update orientation training information for IBC members	Aug-09	MM	Not Started	This is reviewed each year and updated as needed.

Goals are broken down into a list of required tasks with completion dates and assigned staff leads



# Tool -Process Mapping

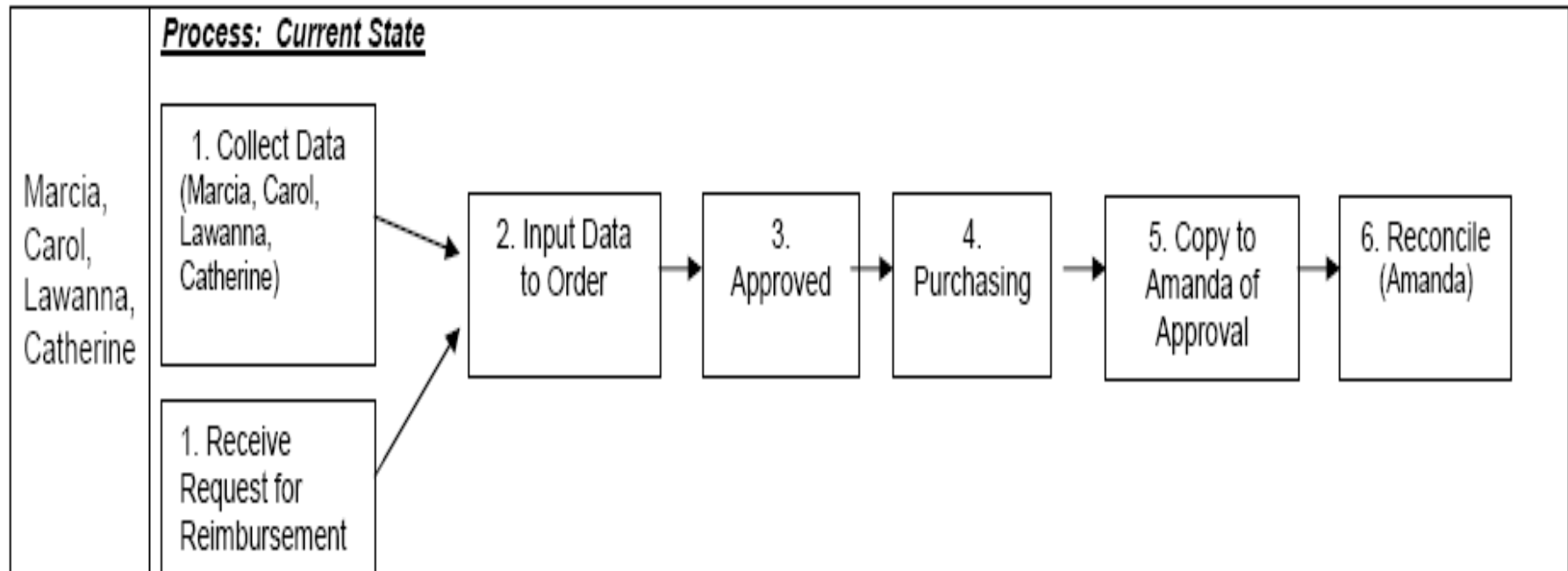
- Visually depict the task
  - Micro vs. macro view of process
  - Process “as is” vs. process you want
  - Engage those who “do” the process

# Process Mapping

**Process:** Financial Management: Macro Purchasing Process

**Process Purpose:** Accurate records and supplies received by customers

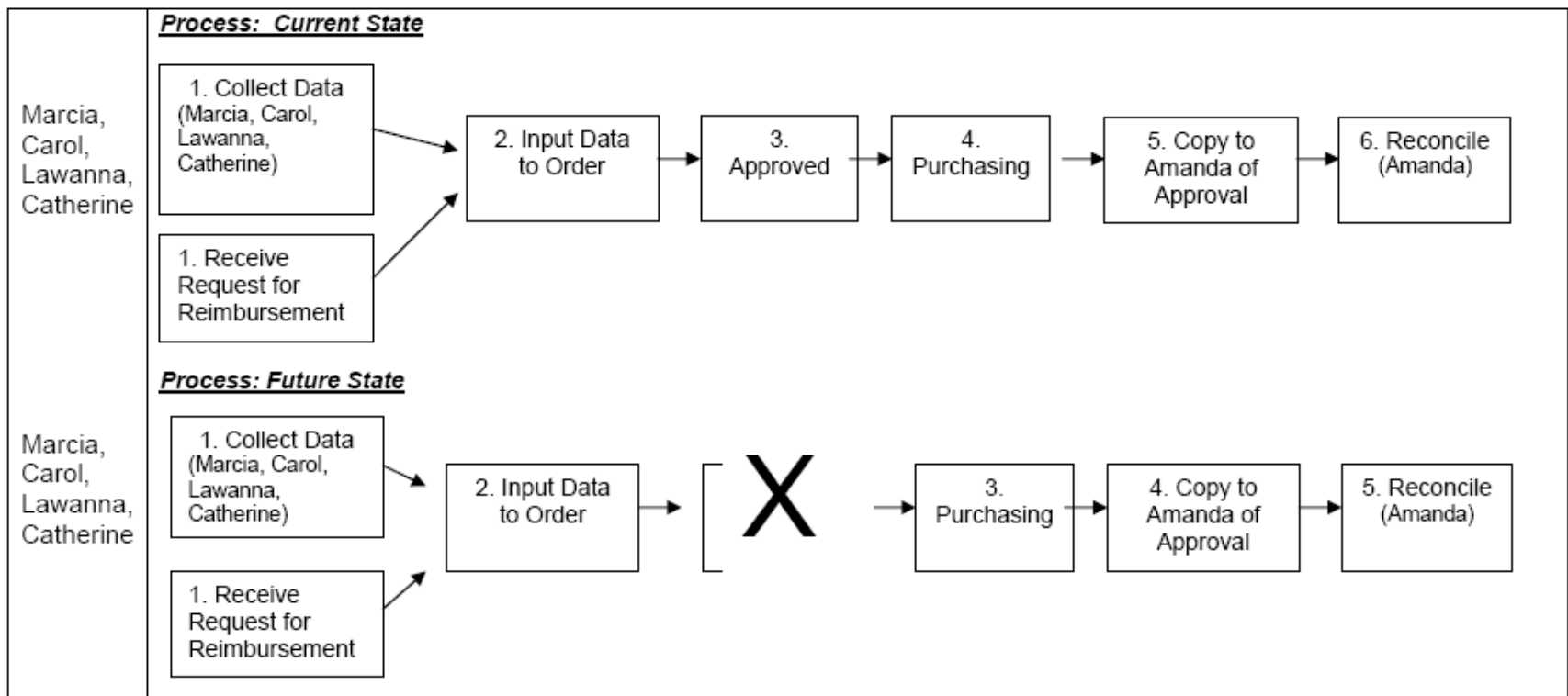
**Process Owner:** Amanda



# Analyze Process

- Does the process support a goal of the unit?
- What assumptions are inherent (i.e. internal requirement, campus requirement, regulatory requirement)?
- Duplication of effort, duplication of data entry?
- Replication of old process with new tools?

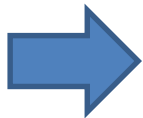
# Analysis: Future State



# From Process Analysis to Tracking

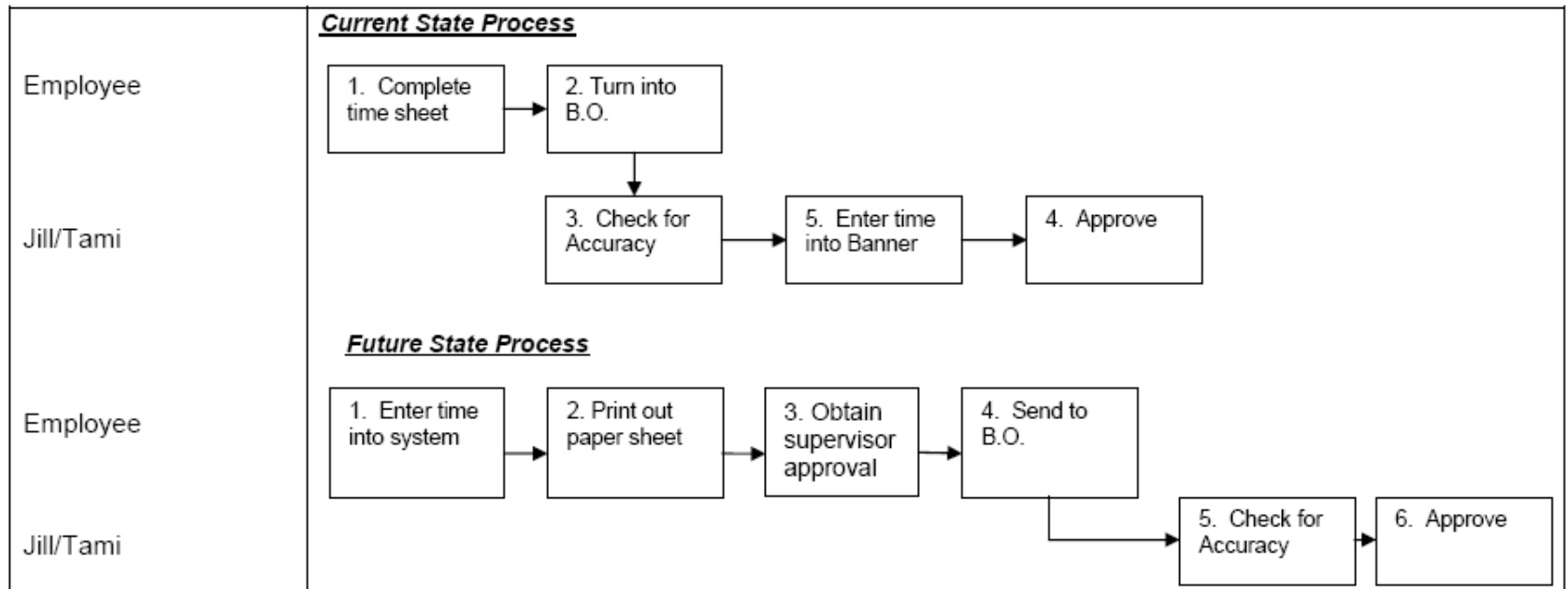
## Conduct and manage financial activities for selected departments

TASK	TARGET DATE	STAFF LEAD	STATUS	METRIC/SUCCESS INDICATOR	COMMENTS
Prepare monthly account reconciliations and reports for C&I	Monthly	JM		C&I FOPs reconciled on a monthly basis	
Prepare monthly account reconciliations and reports for Ed Psych	Monthly	LC		Ed Psych FOPs reconciled on a monthly basis	
Prepare monthly account reconciliations and reports for BER and Clift	Monthly	BR		BER FOPs reconciled on a monthly basis	
Prepare monthly account reconciliations and reports for Ed Admin units	Monthly	MM		Ed Admin FOPs reconciled on a monthly basis	
Complete and approve university transactions related to purchasing, reimbursement, etc for Ed Psych and C&I	Cont.	MM		Transactions completed and/or forwarded to campus within 3 working days	



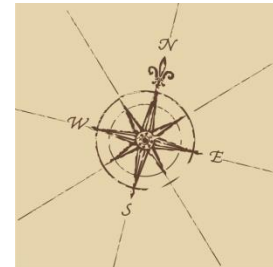


# Another Example



## Task 2: Map this Process

- A) Purchase computer for your unit head
- B) Implement use of Hiretouch (applicant tracking) software in your unit
- C) Prepare a proposal budget for a faculty member
- D) Process of your choice



# Evaluation

- Continual tracking throughout the year
  - Programs/functions used in biweekly meeting agenda template
  - Meet 3x/year to review plan
- Provides a list of accomplishments
  - Framework for annual report
  - Assists in employee performance evaluations
- Reveals issues
  - Resource needs, poor planning, unanticipated events, performance problems

# Tips for Success

- ✓ Review goals and progress periodically
- ✓ Engage key stakeholders in the development & review of the goals
- ✓ Keep the process relevant and meaningful
- ✓ Make changes to practice based on your results

# Stay Organized: Sharepoint

Home - BRP - Windows Internet Explorer

http://wss.ed.uiuc.edu/brp/default.aspx

College of Education WebShare > BRP

**BRP**

**Home**

- View All Site Content
- Documents**
- Lists**
  - Calendar
- Discussions**
  - Team Discussion
- Sites**
- People and Groups**
- Recycle Bin

College of Education Budget & Resource Planning Shared Document Site

**Announcements**

**Best Practice - Purchasing**  
by Ocen, Catherine Apio  
Please review the Best Practice document and give me feedback by February 16, 2009

**Form for Front End**  
by Stimson, Suzanne  
Please see the document showing information to be used in the creation of an electronic form for entering data into the Front End. Please provide any comments/suggestions you may have to help

**HR Best Practices**  
by Stimson, Suzanne  
Please see the document for HR Best Practices and add any comments or suggestions by January 15, 2009.

(More Announcements...)

Add new announcement

**Shared Documents**

Type	Name	Modified By
	Sample of items	Ocen, Catherine Apio
	BEST PRACTICE PURCHASING	Ocen, Catherine Apio
	admin unit financial plans	Geissler, Barbara J
	Goals 08_09	Geissler, Barbara J
	Form for Front End	Stimson, Suzanne

# Additional Information

- Campus planning resources
  - Human Resource Education Dept 333-0807
  - Illinois Business Consulting  
<http://www.ibc.uiuc.edu/>
  - T4B <http://www.studio5d.com/T4B/>
  - <http://education.illinois.edu/brp/EnhancingOrganizationalEffectiveness.html>

# Wrap Up

- How will you use this information?

Questions / Comments?