**Organizational Processes Executive and Steering Committees**

Progress Report January 2018

The objective to design, implement, and refine integrated organizational processes that optimize the efficiency and effectiveness of the university’s business and academic operations is being pursued through three goals and nine strategies. This progress report provides an update and plan for next steps.

The proposal submitted by the Executive and Steering Committee titled “A University-wide, Structured Approach to Organizational Excellence” was approved for funding in December 2017. The proposal was the result of the committees’ work to benchmark other institutions (Goal 1: Strategy 1). The proposal will further address the two additional strategies in Goal 1, namely to develop a university-wide approach to change management and organizational excellence and to recommend a process for sustained professional development to support leaders at all levels to support their efforts and ability to manage change.

The next six months, a working group will implement the proposed project. To facilitate the development of a University-wide structured approach to change, the Steering committee will be engaging the services of a consultant, Maury Cotter, Director Emeritus of the Office of Quality Improvement at the University of Wisconsin. Maury brings over 25 years of experience in change management and process improvement and has developed and evolved internal change offices at two major research universities (UW-Madison and UC Berkeley) and one international association (OECD – Organization for Economic Collaboration and Development). She is also the co-founder of the Network of Change and Continuous Innovation, a professional network for change leaders in higher education.

The Steering committee will be engaging the services of Maury Cotter to assist with the development of a structured approach to change and to help guide its application to initial projects. A consulting proposal has been drafted for a 2-3 day visit in February, March, or April. In preparation for the visit, Maury will hold a Zoom meeting with the committee to gain a better idea of the scope of the project and to learn more about existing change management projects at the University. During her visit, Maury will meet with change leaders from across the University and work with the committee on the outline of an integrated approach to change that builds upon and complements current efforts and expertise at Penn State. Maury will also guide the committee through the process of identifying and scoping pilot projects. Following the visit, Maury will submit a report with recommendations for the design of a structured approach to change that aligns with the needs and culture of Penn State and includes suggestions for potential structures, reporting relationships, functions, talents, and resources to support that approach.

Additional efforts this year will include a refinement of the Organizational Processes Strategies and Goals matrix, with particular emphasis on identifying key academic and business processes to apply the change management and process improvement tools. In conjunction with the identification of processes the Steering Committee will form a working group to develop a process for prioritization. These two items are detailed in the matrix under Goal #2 (To promote implementation of change management and leadership strategies). In addition to the formation of a working group to address that goal, the Organizational Process Steering Committee will work closely with the funded project team to ensure that the processes that are developed are aligned with the emerging recommendations and structure. They will also benefit from additional members across the university (e.g., Business and Finance) so that there is alignment with ongoing processes and recent investments made in that office.

The use of working groups will be modeled after the work in the Transforming Education Steering Committee, so that greater engagement across the university can be achieved. An additional outcome is that the Steering Committee will provide opportunities to attract proposals for the third round of the RFP process. These proposals will benefit from clear articulation of the recommended processes that emerge from the prioritization strategy. The working groups will also be expected to review the foundations (access, student engagement, diversity, global engagement, economic development, sustainable future) and incorporate the foundations into their work—either through the prioritization process or the implementation.