Organizational Processes

January 31st, 2018

**To realize Penn State's commitment to impact, the University must design, implement, and refine integrated organizational processes that optimize the efficiency and effectiveness of our business and academic operations. In today's ever-changing landscape of higher education, our organizational processes must also promote strategic and agile responses to emerging challenges and opportunities. The design, deployment, and improvement of organizational processes often necessitate system- and individual-level changes. The following goals and strategies support the development of a University-wide approach to change management and leadership that will further the University's competency to rapidly and successfully change. The strategic plan 2016-2020 foundations (Enabling Access to Education, Engaging Our Students, Fostering and Embracing a Diverse World, Enhancing Global Engagement, Driving Economic Development, and Ensuring a Sustainable Future) should be considered imperatives for all members of our University community and as such these foundations should be woven throughout the development of change management at Penn State.**

# Goal #1: Establish University-wide approach to change management and leadership

| Goal Terms | Strategies | Plans | Leads and Working Groups |
| --- | --- | --- | --- |
| **Short Term** | #1 Benchmark | Benchmark to learn how other universities and organizations manage and lead change - This work was completed. The benchmark study influenced the cycle 1 proposal that was submitted to address organizational excellence via change management and continuous improvement. | **Leads:** Jeff Fortin, John Drake  **Working Group:** Change Management Team |
| **Medium Term** | #2 Develop approach to change management | Develop recommendation on University-wide approach to change management that supports organizational success and outcomes - The outcome of the funded proposal will make significant progress on this strategy. | **Leads:** Jeff Fortin, John Drake, Peter Moran  **Working Group:** Change Management Project Working Group |
| **Long Term** | #3 Enhance change leadership | Design and implement sustained professional development leadership program that prepares faculty, staff, and administrators to effectively manage and guide change - The outcome of the funded proposal will make progress on this strategy. | **Leads:** Jeff Fortin, John Drake, Peter Moran  **Working Group:** Change Management Project Working Group |

# Goal #2: Promote implementation of change management and leadership strategies

| Goal Terms | Strategies | Plans | Leads and Working Groups |
| --- | --- | --- | --- |
| **Short Term** | #4 Identify need for new and improved processes | Compile the identified organizational processes that are possible for applying change management practices. Share the list with strategic plan implementation groups and other university stakeholders to supplement the list of organizational processes for the first-round of down selection. With Goal 1 use the tools available to develop a prioritization process. | **Lead:** Renata Engel and Peter Moran  **Working Group:** Business and Academic Organizational Processes Working Group |
| **Medium Term** | #5 Prioritize processes for study | Work with university leadership and strategic plan oversight committee to determine the first few organizational processes for design and/or implementation improvement. Recommend one business process and one academic process | **Lead:** Renata Engel and Peter  Moran  **Working Group:** Business and Academic Organizational Processes Working Group |
| **Long Term** | #6 Revisit and Reassess | Employ periodic reassessment of organizational processes that can be approved and the priorities assigned. The reassessment process is likely to emerge from the work of the Organizational Excellence project. No leads will be assigned until mid-Spring | **Lead:** To Be Determined  **Representatives from both Working Groups:** Change Management Project Working Group and Business and Academic Organizational Processes Working Group |

# Goal #3: Pilot Study of Recent Organizational Change

| Goal Terms | Strategies | Plans | Leads and Working Groups |
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| **Medium Term** | #7 Identify organizational process change to be studied | Refine characteristics of effective project/process improvements and use components of that characteristics to explore evaluative tools for large-scale organizational changes. | **Lead:** Organizational Processes Steering Committee with Review by Organizational Processes Executive Committee  **Working group**: To Be Determined but started as part of the Change Management Project implementation. |
| **Long Term** | #8 Undertake Evaluative Process | Implement assessment of change management for a business and academic process. The business process may be able to be implemented within the Business and Finance office as part of their change management structure. If so, the process, including identification of stakeholders, key data to collect, and reporting structure will be documented. | **Lead:** To Be Determined  **Working Group:** To Be Determined |
| **Long Term** | #9 Inform University-wide approach to change management | Evaluation Process group meets with Change Management Team to report lessons learned from #8. | **Lead:** To Be Determined  **Working Group:** To Be Determined |