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Business Practice Improvement
UNIVERSITY STRATEGIC CONSULTING

Growing the Next Generation of Administrative Leaders:

BPI Fellows and Scholars Programs

NCCI Presentation
Seattle, WA
July 2014

Discussion Topics and Agenda

- Background and Program Catalysts
- Program Concept
- Design and Implementation
- Experience and Lessons Learned
- Q&A

Background & Program Catalysts

Bill Dracos

Associate Vice President, Administration

Chief Business Practice Improvement Officer

Challenges Faced: The Current Emory Environment

- **Emory has experienced rapid growth over the past decade.**
 - Rapid growth was not accompanied by process and system redesign.
- Emory's **current business environment** can be **inconsistent**. **Schools & units** have **developed** their administration somewhat **independently**.
 - Best practice in some areas; improvement needed in others.
 - Highly variable service levels.
 - Some adequacy of internal controls.
- **Cases of suboptimal practices, systems, and processes have resulted in:**
 - Frustration, heavy workloads, ineffective outcomes, and errors.
 - Variance in the quality of resources and local processes supporting tasks.
 - Inadequacy of internal controls.

Emory's Target Environment

The goal is for Emory to be a place where:

- There are **clearly defined and transparent processes**, roles, and responsibilities among departments, schools, and units.
- **Time, effort, and resources are not wasted** on duplication, rework, or miscommunication.
- A **solution-oriented team approach** is standard; people **enjoy their work** and feel good about the quality of processes.
- Local needs are **respected** while University requirements are met.
- **Clear goals** and measures for success: result in **accountability** and **ownership** at all levels.
- Personnel demonstrate a high degree of **competency**.
- Work is **consistently high quality**.
- Correct information is provided in a **timely** fashion.
- Respectful communication, **constructive, honest dialogue**, and **mutual trust** exist.

BPI Team and Governance



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- BPI is an office of **University Strategic Consulting**.
- The BPI team is a blend of **former consultants**, experienced **project managers**, and **higher education professionals**.
 - Our team has **brought experience** from organizations such as: **Bain Consulting, PwC, Ernst & Young, Huron Consulting, SunTrust Robinson Humphrey, Accenture**, University of **Miami**, and (of course) **Emory University**.
 - This positions us well for **making meaningful contributions** to Emory.
- BPI is **inclusive of people** from across the enterprise:
 - BPI is **overseen** by a **Governing Advisory Committee** of Emory EVPs, Chair(s) of the Faculty Council, faculty, and Deans.
 - Each **project** is led by an **Executive Committee** and operated by broad-reaching **Working Groups**.
 - Projects **seek input from campus** through interviews, focus groups, surveys, sounding boards, and other methods.

Business Practice Improvement

BPI Mission Statement

BPI provides a collaborative, structured, transparent and data-driven approach to solving complex and ambiguous business challenges across multiple units and constituencies.

Our solutions drive lasting change, improvements, and innovations that result in efficient and effective business operations and facilitate Emory's mission.

LET US STAND BY WHAT IS GOOD AND TRY TO MAKE IT BETTER.

– ATTICUS HAYGOOD

BPI Core Values

BPI's goal is to serve the overall best interest of Emory University, its faculty, students and staff, in pursuit of Emory's vision. Among BPI's core values:

1. We value **integrity, honesty and candor**.
2. We value **clear, transparent communications**.
3. When problems arise, we do not point blame, but rather **focus on solutions**.
4. We operate out of **mutual respect** for our colleagues and their work.
5. We maintain the '**big picture**' of **Emory's best interests**, and resist the temptation to protect our local interests.

BPI Objectives

- To develop solutions that will **eliminate inefficient or duplicative work**.
- Focus on **effectiveness, efficiency, qualitative ROI, and cost savings**.
- To **decrease frustration and enhance productivity** in Emory's operations.
- To **facilitate the improvement process**, applying industry-leading practices (not just from Higher Education). The client (school/unit) "owns" the issues.
- To **develop and implement collaboratively** practices and policies that:
 - ✓ are sensible,
 - ✓ accomplish clearly articulated goals,
 - ✓ are cost-effective,
 - ✓ are service-oriented,
 - ✓ include effective internal controls,
 - ✓ support responsible stewardship of Emory funds, and
 - ✓ meet regulatory compliance requirements in a sensible way.
- To support the institution's academic, research, scholarship, and clinical missions via **improved and scalable services**.
- To be **inclusive** of Emory schools, units, and leadership.

How is this achieved?

- Through **participatory and collaborative processes** that are:
 - inclusive of Emory schools, units, and leadership,
 - focused on substantive and thoughtful work, and
 - acting in the overall best interests of Emory's mission
- By **being open to new ideas** and new ways of organizing people, processes, and technology
- By **continually seeking to improve our operations** and **avoiding “self-interested” bias** in developing solutions
- By **measuring results** and adjusting as needed
- By **continuously communicating** and seeking input from all
- By working with a **long-term perspective** in a multi-year process

BPI Areas of Focus for Practice

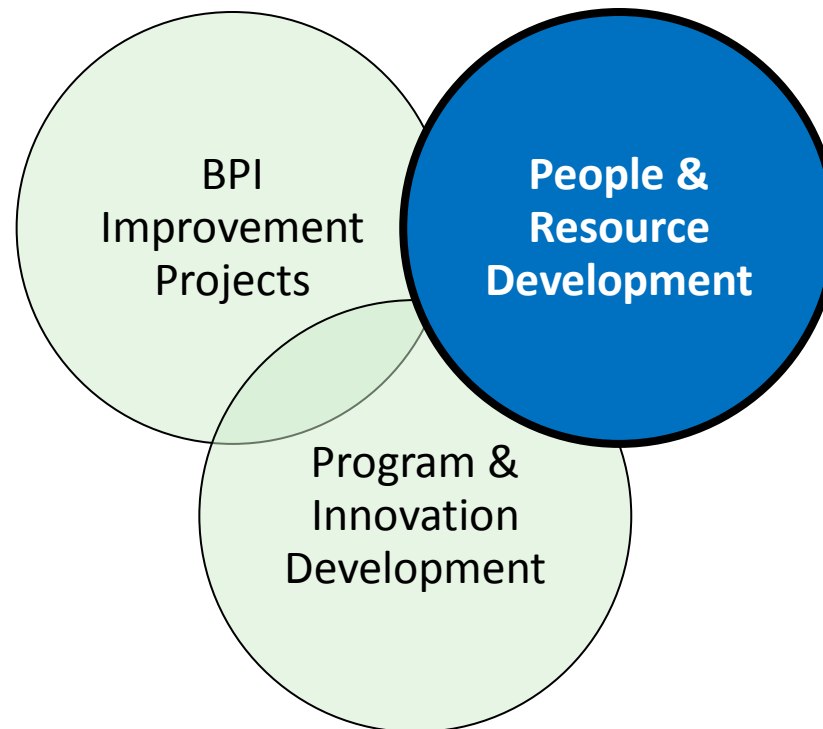
The Goal of BPI is to significantly improve the services, performance, satisfaction, and cost effectiveness of the work required to support the mission of a top tier, vibrant research university in the 21st century.

Toward this end, the practice is focused on three major areas of activity.



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People & Resource Development Opportunities

- There is a **strong need to develop new and existing business professionals** at Emory. We need **effective business leaders** for now and **for the future**.
- **Two Needs:**
 - **Enhance, train, and groom current early and mid-career business professionals.**
 - **Develop a pipeline** for future business leaders.
- BPI is **uniquely positioned** to help develop this talent, as well as **teach analytics, problem solving, project management, and higher-ed business operations.**
- **Two new programs – BPI Fellows and BPI Scholars** – have been developed to address these needs.

Program Concept

Chris Rapalje
Manager, Business Practice Improvement

Identifying the Need

In examining ways to **contribute to people and resource development** at Emory, BPI considered the following:

- How might **BPI share its distinct skill** sets to help Emory staff?
 - What can we teach? To whom? At what level?
- How does Emory **train its staff** and **promote** their **career growth**?
 - What is offered? At what levels?
- How can we **enhance visibility** around all of **the various career paths** that are possible at Emory?

Identifying the Need

- We further **considered what skills, which align with BPI's competencies, are most needed** across campus.
- We identified the following high-level themes:
 - Data Collection and Analysis
 - Effective Decision Making
 - Project Management
 - Leadership

What Already Existed?



BPI Fellows

Recent graduates interested in higher education or non-profit management.

BPI Scholars

Early to mid-career professionals across the University.

Excellence Through Leadership (ETL)

Directors and higher across the University.

Physicians Executive Program (PEP)

Physicians and their professional staff; focus on management in health settings.

Woodruff Leadership Academy (WLA)

Highly advanced senior professionals, with health sciences focus.

Academic Leadership Program (ALP)

Faculty across the University.

Human Resources Offerings

- Throughout one's Emory career
- Focus on learning and development opportunities
- Topic-driven classes providing a wide variety of career-enhancing education (e.g., *Crucial Conversations, Influential Leadership*)

Program Design – BPI Fellows and Scholars

- **What did we hope to accomplish? We sought a balance of:**
 - **Instruction and skill building,**
 - **Exposure to a broader view of the university, and**
 - **Application of new skills and knowledge.**
- **Key program elements were conceived.**
 - **Classes: Core content instruction in analytics, approaches, and methodologies.**
 - **Leadership Lecture Series: Seminars with senior leaders regarding their operations, knowledge, and wisdom.**
 - **Practicums/Improvement Projects: Hands-on work to apply new skills and benefit students' home units.**

Program Design – Why BPI Classes?

- To **teach skills and approaches** that are **not otherwise taught** at Emory.
- Convey, in action, that **BPI's analytical tools and methodologies** (and its approach to projects) utilize **established practices that can be learned**.
- Present these practices as part of a **formal curriculum** to **enhance students' capabilities** and **promulgate their benefits** across campus.
- **Assist students** with their **practicums and project work** by teaching a theoretical framework and structured methodology for approaching their projects.

Program Design – Why a Leadership Lecture Series?

- **Expose** program participants to the **work of university leaders** and **spark motivation** around the potential for career advancement at Emory.
- Provide them with a **broadened appreciation** for **all that it takes** to run a large research university.
- Reinforce program **prestige and selectiveness** by providing a **small, informal audience** with members of **senior leadership**.

Program Design – Why Practicums/Improvement Projects?

- **Leverage BPI's knowledge and experience** by applying its approach to **efforts smaller in scale** than typical BPI projects.
- **Reinforce**, through hands-on experience, the **principles and methodologies** conveyed in program classes and lectures.
- Provide Emory with a **creative, low-cost approach to practice improvement opportunities** across campus, while **promoting individual and unit responsibility** for addressing challenges.

BPI Fellows: Structure and Content

- **WHAT IS IT: Two-year management development program selecting recent graduates (0 – 2 years out).**
 - **Year 1: work as full-time BPI staff, program coursework, and Leadership Lecture Series attendance.**
 - **Year 2: work as full-time staff member at Emory business unit(s) with continued coursework.**
 - **At successful program completion, eligible for (but not guaranteed) hire at Emory.**

BPI Fellows: Benefits to Emory

- Creates and develops a **pipeline of quality early-career employees** for service to Emory.
- Provides **relatively low-cost** resources to help with BPI project efforts.
- **Expands networking and partnerships** between BPI and other Emory departments and business units.

- **WHAT IS IT: One-year professional development program** for high-performing, early and mid-career **Emory employees**.
 - **Remain in their current roles** with participation in program representing a **commitment of about 15% of their time**.
 - **Competitive application process** in which sponsored candidates present a **practice improvement opportunity** in their units.
 - Participate in **program coursework** and **attend Leadership Lecture Series**.
 - Complete proposed **improvement project** with **assistance and guidance from BPI** with these efforts.

BPI Scholars: Benefits to Emory

- **Develops management skills** of existing employees, helping to prepare them for “next level” responsibilities.
- Fosters unit and individual responsibility for **addressing challenges** and **improving performance**.
- **Recognizes high-performing employees** and provides them with instruction in analytics and project management that should help their **career advancement at Emory**.
- **Expands networking and partnership** between BPI and other Emory departments and units.

*Promotes the **application of structured best practices** among Emory business units.*

Program Overview in Summary

Program	Structure & Content	Benefits to Emory
BPI Fellows	<ul style="list-style-type: none"> • Two-year management development program selecting recent graduates. • Year 1: work as full-time BPI staff, program coursework (including graduate-level instruction), and Leadership Lecture Series attendance. • Year 2: work as full-time staff member at Emory business unit(s) with continued coursework. • At successful program completion, eligible for (but not guaranteed) hire at Emory. 	<ul style="list-style-type: none"> • Creates and develops a pipeline of quality early-career employees for service to Emory. • Provides relatively low-cost resources to help with BPI project efforts. • Expands networking and partnerships between BPI and other Emory departments and business units.
BPI Scholars	<ul style="list-style-type: none"> • One-year professional development program for high-performing, early and mid-career Emory employees. • Remain in their current roles with participation in program representing a commitment of about 15% of their time. • Competitive application process in which sponsored candidates present a practice improvement opportunity in their units. • Participate in program coursework (including graduate-level instruction), and attend Leadership Lecture Series. • Complete proposed improvement project with assistance and guidance from BPI with these efforts. 	<ul style="list-style-type: none"> • Develops management skills of existing employees, helping to prepare them for “next level” responsibilities. • Fosters unit and individual responsibility for addressing challenges and improving performance. • Recognizes high-performing employees and provides them with instruction in analytics and project management that should help their career advancement at Emory. • Expands networking and partnership between BPI and other Emory departments and units. • Promotes the application of structured best practices among Emory business units.

Design and Implementation

Ashley Teal
Senior Associate, Business Practice Improvement

People & Resource: Development Opportunities

BPI Fellows	BPI Scholars
New Emory hires – recent graduates	Existing Emory employees – mid-career professionals
2 year full-time program	1 year part-time program
Attend courses and lectures	Attend courses and lectures
Assigned to new and existing BPI projects	Identify and complete a new project specific to their unit

From Concept to Design

- After **numerous brainstorming sessions** and **meetings across campus**, we developed the structure for these new programs.
- This idea was **presented to Emory's leadership** for approval in June of 2013.
- Between July 2013 and January 2014, we were charged with **making the program a reality**.
 - We transformed **96 slides of analytical tools** into **12+ courses**.
 - We organized the **course content and lecture speakers** into a logical and cohesive timeline.
 - We scheduled a **recurring class meeting time** outside of office hours to accommodate the busy schedules of our attendees and speakers
 - **Lectures were scheduled immediately** with speakers, Emory leadership, to provide months of lead time needed for speakers' calendars.
 - All coursework attended by Fellows and Scholars is considered **"mandatory"** at the onset of the program
- Specifically for Fellows, we **created a new job description** and **prepared** office space to accommodate new hires.

Curriculum Components

1. Program Coursework (details provided on next slides)

- In-class instruction organized and facilitated by BPI.
- Content to cover a broad range of topics; develops project management and analytical skills.

2. Leadership Lecture Series (details provided on next slides)

- Emory leadership presents a particular topic of University management.
- Provides an expanded view of challenges in higher education.

3. Practicums/Improvement Projects

- For Fellows, work on BPI projects as a full-time staff member.
 - Rotate out, full-time, to Emory business unit(s) for second year of program.
 - This or other unit could hire Fellow at successful program completion.
- For Scholars, work on a practice improvement project for their units.

Curriculum

1. Program Coursework - Taught by BPI Staff

- The BPI Approach
 - Project Management 101
 - Business Psychology
 - Data Acquisition
 - Qualitative Analysis
 - Process Mapping
 - Statistical Analysis
 - Practical Finance
 - Business Writing
 - Creating and Delivering Effective Presentations
 - Healthcare Finance
 - Negotiation & Bargaining
 - Analytical Thinking
 - Team Building and Leadership
 - Live Presentations and Critiques
- Courses include **pre-read** materials, **lectures**, and **in-class activities**.
 - Through interactions with our inaugural cohort, we determined the need to **synchronize coursework with the needs of students' project work** (i.e., we front-loaded the curriculum with BPI courses).

Curriculum

2. Leadership Lecture Series - Taught by Emory Leadership

- Academic Culture
- Being an “Intrapreneur”
- Being a Research University
- Emory and Its Structure: Units, Network and Affiliates
- Endowment Management
- Facilities Management and Planning
- Financial Analysis at Emory
- From Concept to Concrete: Building Development and Construction at Emory
- From Innovation to Commercial Partnership - Office of Technology Transfer
- How to Run a Department
- How to Talk to Your Department Chair and Faculty
- Implementing and Maintaining Good Internal Controls
- Managing Campus Life
- Managing Development & Alumni Relations
- Managing Technology at a University
- Managing the Admissions Process
- Managing University Human Resources
- Managing University PR/Media Relations
- Running a School
- Running a University Museum
- The Business of Higher Education
- The History of Emory
- University as Neighbor
- University Budgeting
- What is a Primate Research Center?
- The Ivory Tower of Babel & All the Things You Wanted to Know about Higher Ed but Were Afraid to Ask

Curriculum

3. Practicums/Improvement Projects

Fellows:

- Global Services Function at Emory
- Business Operations within Emory Special Collections' Library

Scholars:

- Post Award Administration for Clinical Research
- Department/School Faculty Promotion and Tenure Process
- Metadata Management and Usage
- Return on Investment for Development and Alumni Association Events
- Communication and Coordination of Alumni Data

Communication

- During the design phase, we **communicated extensively** across campus via **multiple channels**, including:

Presentations to:

- *Business Officers Forum*
- *Department Administrators*
- *Leadership Discussions*

Publications:

- *Human Resources Announcements*
- *Emory Report (all-campus publication)*
- *Newsletters*

- This allowed us to **achieve buy-in** and support from **key constituents**.

Partnerships

- During the design phase, we created **new partnerships** via **connections with other professional development programs** at Emory.
- **Two other** leadership **programs** teaching **similar or overlapping content**. These programs were traditionally **targeted at Faculty and Physicians**.
 - Physician Executive Program (PEP)
 - Physician Leadership Development Program (PLDP)
- By working with PEP and PLDP leaders, we now **cross-list Fellows and Scholars** in non-overlapping courses and lectures offered in PEP and PLDP (now a combined program).

- **Fellows**: Recent Graduates (early career)
 - **Applications** are received through both the **Human Resources** and **Undergraduate On-Campus Recruiting** online systems.
 - They are **screened for initial eligibility**, and promising candidates are called in for a **preliminary interview** with Fellows and Scholars Program Staff.
 - Top candidates are brought in for interviews with the remaining BPI Staff.
 - Once selected, Fellows are offered a **full-time position for two years**.
 - **Fellows join** the BPI office **approximately two months before program courses** are set to begin.
 - They follow the same **onboarding process as all BPI staff**.
 - They are **integrated into existing projects**.

- **Scholars:** Early to Mid-career Emory employees
 - Scholars applications for the first class were submitted in November. Complete applications include:
 - **Application Form, Sponsorship Statement, and Resume**
 - As a part of the application process, Scholar candidates **propose a practice improvement opportunity within their unit.**
 - Each application is **reviewed** by the Fellows and Scholars Advisory Committee and **rated** on key elements.
 - Scores are submitted and **compiled** in preparation for an Advisory/Selection Committee meeting to **discuss each candidate.**
 - Once selected, **Scholars participate in program courses and lectures.**
 - They also immediately dive into their projects by **developing a thorough scope and workplan, via their “BPI Project Playbook.”**

Ongoing Coaching and Mentorship

- **BPI Fellows** are a part of the BPI Staff; they receive **ongoing coaching** and **career development** guidance from the Fellows and Scholars Program Staff as well as BPI Directors and Managers.
- **BPI Scholars** are each assigned a **coach to use as a resource** throughout their project work.
 - **Scholar coaching sessions** are in addition to program courses and lectures.
 - The program is designed to include **routine checkpoints for project progress**, but Scholars coaches are tasked with providing additional assistance and ensuring project success.
- **Coaching** proved to be an important way to **receive early feedback** on the program.

We've Made Exciting Progress

- The first two **BPI Fellows started in December 2013** with a **second set of BPI Fellows started on July 14th**.
 - By year-end, the Fellows who started in December 2013 will be placed in their second-year practicum, which have already been secured.
- Seven **BPI Scholars were selected** from a pool of **over 30 applicants** to begin in January 2014. We are in the midst of the application and acceptance process for the second Scholars class set to begin September 2014.
- We are **over halfway through the curriculum calendar**. Classes and lectures have proven to be a great way for **Fellows and Scholars to connect with each other**.

Experience and Lessons Learned

Bill Dracos

Associate Vice President and Chief Business Practice Improvement Officer
Business Practice Improvement

Lessons Learned

- **Recognize the need** to develop the next generation of talent.
- **Promote the program: road shows, articles, and so forth!** Talk it up!
- **A rigorous selection process** is important.
 - Involve others – we have a **10-person Advisory Committee**.
 - Lends itself to the **selection of a strong cohort**.
- The **timing of curriculum** is important.
 - **Match the curriculum** to the **project cycle**.
 - **Skill build at first. Analytical skills a bit later.**
- **Take time** (up-front) to **structure the projects**.
 - Project **success is dependent upon** ample time to **project plan**.
 - We **require students** to **draft and re-draft** their **“Playbook.”**

Lessons Learned

- **Internal communications** are critical as they relate to project work.
 - Ensure **Scholars communicate** with **Sponsors** and key **constituents**.
- **Push them.** Demand **excellence** and **hard work**.
 - **Teach** Fellows and Scholars “**how to fish.**”
 - They may say, “tell me what to do.” Don’t. They **learn through problem solving**.
- Be **flexible** – curriculum, speakers, and students’ time.
- **Attrition** will happen. Plan for it.
- **Check-in presentations** are critical:
 - Gives **visibility** into progress. Creates **accountability**.
 - Forces **focused attention** by the attendees.

Lessons Learned

- Do not let university bureaucracy impede you.
 - These type of “**Fellows**” are a **different job type** for most universities.
 - **Create a NEW job description.** No square peg in a round hole.
- Lastly, it’s **important to have fun!**
 - Make it an **open and friendly experience.**
 - The **interactions are invaluable!**

Discussion and Q&A

...Or contact us for questions after NCCI at:

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