UNC GA Organizational Assessment
Interim Update

March 4, 2016

THE BOSTON CONSULTING GROUP

Project objectives

Assess how effectively General Administration is supporting the legislative mandate, strategic priorities and the needs of the institutions

Clarify roles among General Administration, the Board of Governors and institution leadership

Determine specific actions to improve the organizational effectiveness and general efficiency of General Administration in supporting the UNC System priorities and mandates

THE BOSTON CONSULTING GROUP

Draft—for discussion only

Methodology featured many inputs to arrive at current-state diagnostic and set of recommendations

Inputs

Current state diagnostic

Recommendations

- **~150 interviews with UNC system stakeholders**
- **~100 GA employee survey responses**
- **GA time allocation study by activity**
- **Information provided by GA**
- **Selected benchmarking**

Synthesis of findings across
- Sentiment across stakeholders
- Strategic priorities
- Role clarity
- Mapping of GA activities and resource allocation
- GA strengths and weaknesses
- Implications

Recommendations to achieve more effective GA in support of the system
- Strategic priorities
- Role clarity
- GA organizational design
- Enablers

Frequent engagement with stakeholders to refine recommendations

THE BOSTON CONSULTING GROUP

Draft—for discussion only

Five themes on strategic priorities have emerged

Access
Opportunity for all

→ **Notion of ensuring the UNC system is open to opportunity for all raised across many stakeholders**

Affordability & Efficiency
Ensure a UNC education is within the financial means of all in the state

→ **Recognition of clear constitutional mandate on affordability but a need for a contemporary definition--a view that efficiency can help achieve affordability**

Student Success
Increase degree attainment and ensure value & relevance for students

→ **Consensus that each institution must provide a clear value proposition to students**

Economic Impact
Contribution to the state

→ **Several surfaced the need for the UNC system to contribute in many ways to the state**

Excellent & Diverse Institutions
Help institutions achieve excellence against their missions

→ **View that the strongest system will be made of strong and unique institutions**

THE BOSTON CONSULTING GROUP

A few priority areas for GA to be distinctive identified

Required activities	**Priority areas for GA to be distinctive**	**Valuable activities, perform pending resources**	**Empower institutions**
Academic portfolio management	**Academic priority areas for GA to drive** • Instructional strategy • Student success • Online education • Transfer & articulation	**HR policy and support[2]**	**Academic areas for institutions to drive** • Military engagement • Research • Career services, incl. internships
Budget development and execution		**International engagement**	
Capital projects planning & budgeting	**Data & analytics**	**IT policy and support[3]**	
Compliance and audit oversight	**Enterprise risk management**	**K16 & Teacher prep**	**Shared service: enrollment drives**
GA internal operations	**External affairs** • Communications and public relations • Advocacy to state and federal leg.	**Safety and emergency preparedness planning**	**Shared service: financial aid verification**
Public records management		**Shared service: IT hosting**	
State Fundraising Reg. and Compliance[1]	**Institutional performance management**	**Shared service: legal affairs[4]**	**Shared service: residency verification**
Tuition, Fees, and Financial Aid Setting		**Shared service: payroll**	
	Leadership acquisition & talent development • General Administration • Institutional leadership	**Shared service: procurement**	
		Shared service: University Advancement (e.g., management gift planning)	
	Policy formation and response	**Title IX/Clery Act technical assistance and training**	

1. Required only if University Advancement (Shared Services) is done; 2. Includes classification and position management, compensation and salary admin, payroll, benefits admin, employee relations, equal opportunity, policy training; 3. Includes IT Security, system development and maintenance, and training; 4. For example, includes immigration support and other specialized support

THE BOSTON CONSULTING GROUP

Draft—for discussion only

Recommendations span several areas

Strategic focus	**①** **Align on set of strategic priorities: access, affordability & efficiency, student success, economic impact, and excellent & diverse institutions**
Role clarity	**②** **Clarify and honor roles for BoG, President/GA, and institutions/BoT/affiliates** **③** **Ensure Chancellor talent is fully leveraged as part of the President's team** **④** **Focus GA on priority roles in support of system strategic priorities and empower institutions where the GA is not well placed to add value**
Invest in GA lean-ins – improving organizational design and enhancing focus	**⑤** **Elevate and expand <u>external affairs</u> to provide a powerful voice for the system** **⑥** **Create a lean <u>strategy and policy</u> unit focused on the system priorities** **⑦** **Strengthen the linkage between <u>finance & budget</u> and <u>strategy & policy</u>** **⑧** **Focus <u>academic affairs</u> on a select set of initiatives to catalyze system-wide progress on strategic priorities** **⑨** **Institute a holistic approach to <u>institutional and system performance management</u>** **⑩** **Align and strengthen <u>data & analytics</u> in support of academic affairs, strategy & policy, performance management, and operations** **⑪** **Integrate and strengthen <u>enterprise risk management, compliance, and legal affairs</u>** **⑫** **Implement targeted approach for <u>attracting, retaining, and developing leaders</u> in the system** **⑬** **Focus <u>Chief of Staff</u> role to support President and coordinate within GA and across institutions**

Enablers	**⑭** **Rationalize ad-hoc reporting and low-value recurring reporting**
	⑮ **Create an environment to support system success**
	  – Strengthen relationships
	  – Instill culture of excellence and innovation across the system
	  – Strengthen GA communication both internally and with institutions
	  – Leverage system-wide talent fully
	  – Support the BoG to increase its effectiveness and focus on system priorities

THE BOSTON CONSULTING GROUP

Draft—for discussion only

Overall recommendations will help drive progress against strategic priorities

Access
Opportunity for all

Affordability & Efficiency
Ensure a UNC education is within the financial means of all in the state

Student Success
Increase degree attainment and ensure value & relevance for students

Economic Impact
Contribution to the state

Excellent & Diverse Institutions
Help institutions achieve excellence against their missions

Stronger role clarity will help rebuild trust across stakeholders and ensure collaboration to advance strategic priorities

New Strategy & Policy unit will develop policies in support of system priorities

Strengthened focus on external affairs to make GA a stronger advocate for the system

Refocused Academic Affairs division spends time on fewer, high value-add areas

Lowering the administrative burden by rationalizing reporting and ad-hoc requests will allow GA and institutions to focus on priorities

THE BOSTON CONSULTING GROUP

Draft—for discussion only