



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

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

Inputs

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

Current state diagnostic

Synthesis of findings across

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

Recommendations

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

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

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 <ul style="list-style-type: none"> • Instructional strategy • Student success • Online education • Transfer & articulation 	HR policy and support ²	Academic areas for institutions to drive <ul style="list-style-type: none"> • Military engagement • Research • Career services, incl. internships
Budget development and execution	Data & analytics	International engagement	Shared service: enrollment drives
Capital projects planning & budgeting	Enterprise risk management	IT policy and support ³	Shared service: financial aid verification
Compliance and audit oversight	External affairs <ul style="list-style-type: none"> • Communications and public relations • Advocacy to state and federal leg. 	K16 & Teacher prep	Shared service: residency verification
GA internal operations	Institutional performance management	Safety and emergency preparedness planning	
Public records management	Leadership acquisition & talent development <ul style="list-style-type: none"> • General Administration • Institutional leadership 	Shared service: IT hosting	
State Fundraising Reg. and Compliance ¹	Policy formation and response	Shared service: legal affairs ⁴	
Tuition, Fees, and Financial Aid Setting		Shared service: payroll	
		Shared service: procurement	
		Shared service: University Advancement (e.g., management gift planning)	
		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

Recommendations span several areas

Strategic focus	<ol style="list-style-type: none"> 1 Align on set of strategic priorities: access, affordability & efficiency, student success, economic impact, and excellent & diverse institutions
Role clarity	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 14 Rationalize ad-hoc reporting and low-value recurring reporting 15 Create an environment to support system success <ul style="list-style-type: none"> – 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

Overall recommendations will help drive progress against strategic priorities

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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