

Revenue Generation and Institutional Savings Task Force

Final Report

June 30, 2023

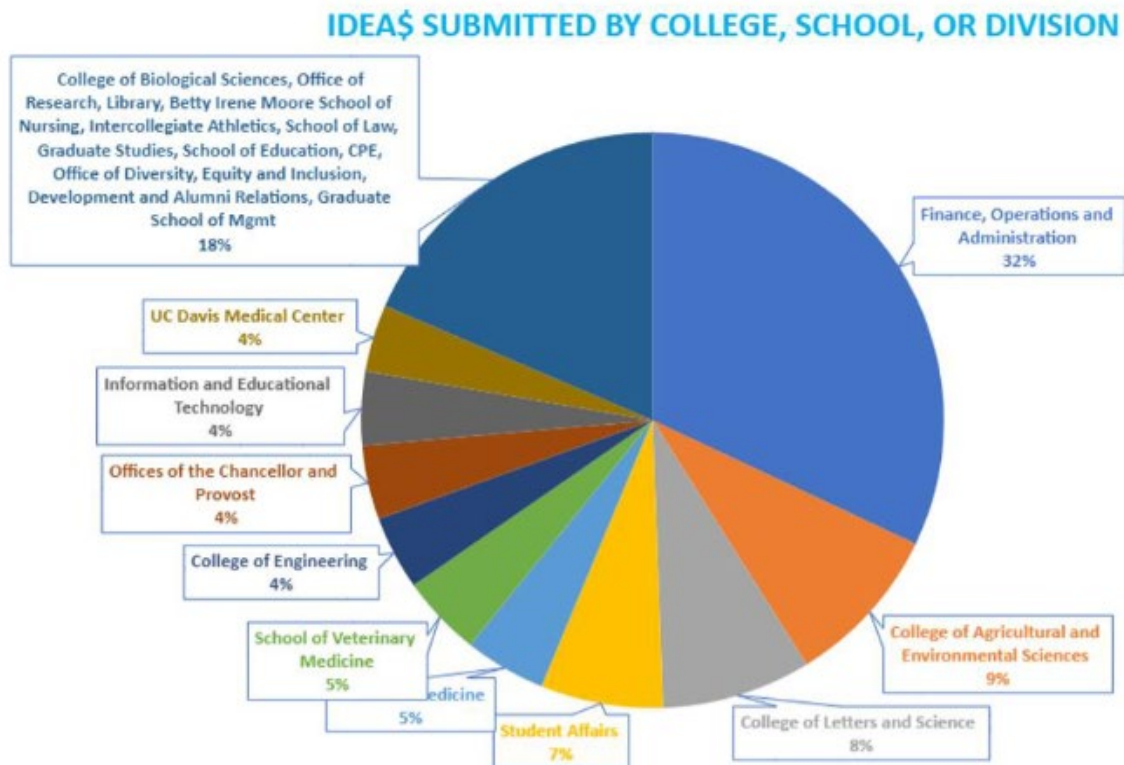
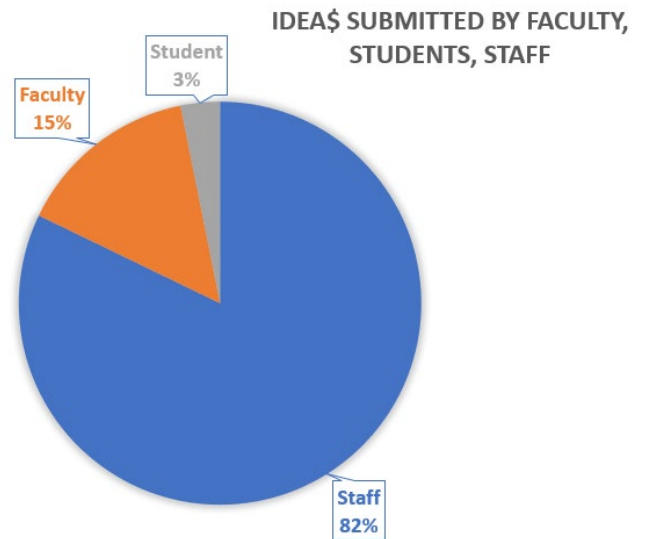
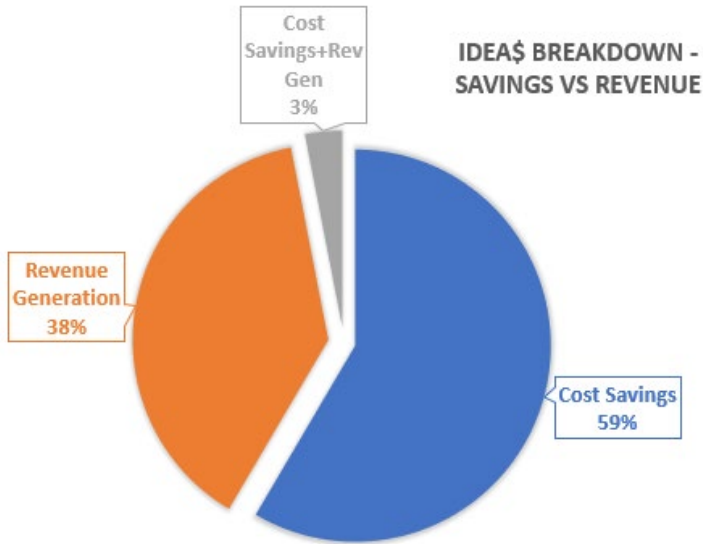
BACKGROUND

The Revenue Generation and Institutional Savings Task Force was formed by the Provost and Executive Vice Chancellor, Mary Croughan, in May 2022 to identify opportunities to generate net new revenue and efficiency savings in administrative practices with a long-term goal of campus financial sustainability (see Appendix I). At the time of the original charge, the campus was projecting a core structural deficit of approximately \$20 million; however, as of the [campus budget framework letter](#) issued in March 2023, this figure had more than doubled (\$58.5 million), making it even more critical that the core budget deficit is addressed. Subject matter experts within education, research, and administration were identified from colleges, schools, and administrative units (see Appendix II) to identify the ideas, submitted through broad campus outreach as well as coming out of research on opportunities or approaches in higher education generally, that would result in at least \$50 million in ongoing net revenue and/or savings that can be applied to the campus core funds deficit within 3-7 years.

TASK FORCE PROCESS

Idea Gathering

Between June 2022 and February 2023, the task force met four times, during which they developed the approach for gathering ideas from the campus community that would come to be [called the IDEA\\$ at Work campaign](#), brainstormed ideas themselves, evaluated practices at other universities that could work for UC Davis, and collected ideas through the IDEA\$ at Work campaign and the Staff Satisfaction Survey. (See Appendix III for further detail on the process). Just under 2,000 ideas were submitted from across the campus community. The following graphics summarize some statistics on the type of ideas submitted and participation in the effort.



Idea Evaluation

The task force engaged a team of UC Davis Masters of Business Administration students, through the UC Davis Graduate School of Management [Impact Program](#), to help develop a process and evaluation tool to assist the task force with reviewing and rating the ideas submitted. The following categories were identified as most important to consider in evaluating the ideas submitted: strategic alignment, expected financial benefit, cost and complexity, student and staff experience, risk, and time to implement. The task force weighted these categories to reflect the relative importance of each to the mission of the University and the task force charge. The tool and process were finalized in December 2022 and the review process began in February 2023.

Once ideas had been collected, task force members were grouped into seven committees, listed below, based upon subject matter expertise, to evaluate and rate ideas between February 2023 through May 2023.

- Financial Operations
- Facilities and Plant, Sustainability
- Human Resources
- Engaging the Public, Goods, and Other
- Research Administration and Innovation
- Information Technology, Services, Clinical Programs, and Program Evaluations
- Education, Academia, and Academic Administration

Every idea submitted was individually read, reviewed, and rated by a committee. Committees were supported by task force staff who arranged meetings, developed training material, and assisted in idea research as needed. All committee members were trained on the rating process to calibrate ratings across all seven committees.

As the committees rated the ideas between February and May 2023, it became clear that many ideas were related or overlapping and could have a larger impact if considered as a group than if only evaluated as single ideas. Committees grouped some related ideas into themes to be assessed. Once ideas and themes were rated, committees discussed the individual metric scores and total weighted priority score to determine whether the relative ranking of ideas and themes seemed appropriate given the committees' expertise, adjusted if needed, and then identified synergies between ideas or other insights.

At the same time, task force staff categorized ideas and themes based on rankings in several ways to help committee members prioritize. An idea or theme's potential was categorized as high, medium, or low according to the overall weighted score and alignment to mission. Quick wins were high potential ideas with low risk scores and had the shortest implementation time. Financial wins were those with the highest revenue potential regardless of other factors, while experiential wins were ideas aligned with the university mission and had high experience ratings. See Appendix IV for additional detail and statistics about the rankings.

At a task force retreat in May 2023, each committee chair presented the top ideas or themes from their committee as well as any additional insights, and the larger task force discussed the ideas and themes finding further synergies between themes and groupings of ideas, ultimately framing big picture recommendations. Finally, in June 2023, the task force met for the last time to weigh in on the final recommendations and provided input on the final report.

RECOMMENDATIONS

The following recommendations reflect the collective work of the task force based on the ideas generated through significant campus outreach. As noted above, ultimately many individual ideas were consolidated into themes or groups of ideas that the task force believes could have a greater financial, efficiency, and experiential impact if implemented collectively. A primary consideration of the task force in reviewing ideas was alignment with our teaching, research, and service mission. As a public institution of higher education, revenue generation must be related to our mission and net revenue reinvested in our mission. It is assumed that all university policies and approval processes would be followed in implementing these recommendations. For example, a new degree program or course would be expected to follow standard academic approval processes.

The task force did not feel that specific net dollar values could be assigned to each of the recommended approaches without more detailed work toward implementation.

However, the task force is confident that its recommendations have the potential to achieve the \$50 million goal of in net savings and revenue if actively pursued with a focus on financial outcomes and with some initial limited-term investment.

Recommendations are framed in general terms highlighting the critical components of each based on the specific themes and/or ideas that resulted in the recommendation. Examples are provided to illustrate concrete ways the recommendation could be implemented and often potential barriers to a recommendation are cited. This approach is intended to provide a flavor of the range of suggestions in each area, reflect the deliberation of the task force, and acknowledge that implementation will not be without challenges. The task force understands that efforts are underway to address aspects of some of these recommendations. Rather than excluding recommendations that relate to efforts underway, the task force hopes that these recommendations will lend weight to the importance of those efforts, indicate that they should be prioritized, and reflect the support for those efforts based on the ideas submitted by the campus community. In addition to the recommendations below, Appendix V provides lists of ideas by categories that illustrate the breath of ideas submitted by the campus community and reflect the task force evaluation of these ideas. These lists can be used by unit and campus leadership to consider implementing additional specific actions.

In evaluating the recommendations, task force urges the Provost to keep in mind several insights that arose in multiple committees and that the group agreed were critical:

- UC Davis is highly risk-averse and will require strong and visible leadership guidance to embrace the level and urgency of the change that is needed.
- Many people, departments, organizations feel problems are prevalent everywhere but their own sphere of influence – a sense of shared responsibility and authority is crucial.
- Implementing changes will require leadership sponsorship and workload support as there are many competing priorities.
- Ideas were submitted that indicated support for opposite approaches to many issues, programs, units, or practices. These areas should be examined.
- Net revenue generation requires a focus on cost containment and efficiencies, not just new revenue sources, for both new and existing activities. This effort will be unsuccessful if net revenue or savings cannot be redirected to address the core fund deficit.
- Transparency in reporting back to the campus community about the task force work and that all ideas submitted were carefully reviewed and considered is pivotal to establishing and maintaining trust in the process.

New Academic Program Development that Could Increase Tuition and Fee Revenue and Support More Enrollment and Additional Types of Learners

- Expand concept of degree program design: examples include stackable certificates leading to a degree (GSM & Nursing are currently working on developing these type of programs); pipeline certificates allowing learners to transition to a degree program (CPE is currently working on these type of programs).
- Expand and maximize online programming and content.
 - Leverage existing content to be converted for online courses/programs
 - Introduce new content with online delivery
 - Improve accessibility for learners from distant, underserved communities, more access during summer
 - Increase the size and/or scale of effective programs which can drive increased net revenue due to efficiencies in delivery
- Reduce barriers for new program development and approval.
 - Streamline campus approval process
 - Provide enhanced resources or services to support new program development
- Develop more programs that will reach different types of learners, such as working professionals, students returning to complete a degree, lifelong learners, and students needing supported education.

- Evaluate fee structures and financial incentives, focusing on opportunities for increased enrollment and fee revenue for certain program types.

Summer Programming that Could Increase Tuition and Fee Revenue, Support More Enrollment, Support Student Success, and Engage Additional Types of Learners

- Maximize Summer Sessions Offerings and Enrollment.
 - Offer a larger number of courses
 - Focus offerings on what is needed by students to succeed
 - Explore fee structures and incentives focusing on options that could increase participation and fee revenue
 - Expand online options to increase enrollment of current students and reach new populations
- Develop or partner with other organizations to increase summer revenue generating programs for non- or pre-matriculated students (for example, enrichment programs for high school students, international students, lifelong learners), using other universities with successful programs as a model (for example, UCB and UCSD).
- Identify ways to increase available summer housing for in-person programs.

Holistic Program for Sales and Licensing of Branded Products that Could Increase External Revenue

- Develop single coordinated strategy for the distribution, e-commerce, marketing, and product offerings of branded products.
- Evaluate financial model and revenue stream for benefit to the university, incentives, and cost of program.
- An outside agency review may be beneficial in this area.

Grow Community Based Clinical Support Services that Could Increase Clinical Revenue and Provide More Student Training Opportunities

- Evaluate services that could grow in the community and support student training and clinical services, such as imaging, pharmacy, and lab services.
- Weigh impact of risk if coordinated with strategic regional growth plan for ambulatory clinics or coordinated with partners.
- Weigh offering specialized veterinary services in the community or co-located with human health services that would also provide student training opportunities.

Evaluate Opportunities and Policies that Could Increase Research-Based Revenue Streams

- Establish policy for faculty salary recovery on grants and allocation of core fund savings, this could:
 - Grow direct contract and grant revenue, facilities and administration cost recovery, and offset core funded salary costs

- Establish consistent approaches across colleges and schools identifying when salary recovery is appropriate and standards for implementing such programs
- Address current barriers and potential incentives. Examples of barriers include existing grant budget limits, policies of certain funding agencies, and faculty workload that is associated with 9- and 11-month core faculty salaries, and faculty workload if more research grants are required to fund faculty/trainee salaries.
- Review and/or establish policies for use of voluntary cost share.
 - Develop or amend current systems in place to enable tracking of voluntary cost share
 - Establish best practices or policy for when it is appropriate to include voluntary cost share on grants, including an approval or review process
- Review and/or establish policies clarifying financial relationships with for-profit entities that will support:
 - Expanding mutually beneficial industry partnerships through consulting, industry use of cores and labs, and training and research partnerships (for example, farm equipment partnerships, engagement with local biotech)
 - Establishing clear policies and consistent practices for these relationships and how to appropriately monetize and recover overhead
 - Address concerns about faculty effort on this work vs. teaching, service, other research, and specifically regarding how such partnerships should be accounted for in faculty progression
 - Identify potential for training programs and that would link to innovative research partnerships (For example, the long-standing Wine Executive Program can be leveraged to develop extensive research-training-product partnerships with industry)
 - Review models other universities have of centers focused on departmental collaboration to solve industry problems, to determine whether this would be a successful approach at UC Davis to increasing industry partnerships

Leverage Research Infrastructure and Resources for Savings and Efficiencies

- Evaluate opportunities for shared space, equipment, and staff.
- Develop a process to review research cores for financial sustainability, determining continuing scientific need and decisions to streamline, sunset, or expand core operations.
- Consider opportunities for sharing research infrastructure or cores with other UCs systemwide.
- Review research administration support models for opportunities to share services or outsource (for example, pooled grant writers, project management, centralize or coordinate technology solutions for researchers using big data).

Standardize and Consolidate Software and Hardware Platforms to Increase Efficiencies and Drive Savings

- Reduce duplication of purchasing, services, and staff training.
- Leverage procurement contracts and scale for savings.
- Address the *many* ideas about specific efficiencies and standardization submitted, including DocuSign, e-Fax, website standardization and support, Google vs. Box, Slack vs. Teams, laptops, LCD screens.

Formalize Approach to Alternate Work Models, Facilitating Alternate Space Use and Savings

- Develop policies or guidelines that address the *many* suggestions about establishing formal, long-term approaches to alternative work, including hybrid, fully remote work, and the 4-day work week. In addressing this issue, consider:
 - Which positions can be effectively done with alternative work arrangements
 - Employee outreach, retention, and wellbeing
 - Cost to recruit and train new employees, and how alternate work could reduce turnover
 - Expertise associated with attracting and retaining employees
 - Establishing alternate uses of space (i.e. hoteling) and how this can reduce use of leased space and reassign campus space for other critical needs, mitigating future space and construction costs.
 - Reduced energy use and environmental impacts
 - Some models of alternative work could result in direct cost savings depending on how they are implemented. For example, some 4-day work week models are coupled with reduced pay.
- Invest in building the skills of managers to support strong work outcomes and accountability in the context of alternate work models so that these models can be effective.

Optimize Campus Building and Land Use, Potential for Both Savings and Revenue

- Continue to work toward using primarily owned space vs. leased space (see also space release due to alternate work models).
- Evaluate revenue-generating development projects that uniquely use our land resources in ways that support campus activities, increase outreach and public profile, welcome a broader community into our campus, support needs of students, visiting families and alumni, employees, and retirees.
- Specifically evaluate frequently proposed suggestions, including:
 - Optimize utilization of proximity to I-80 for revenue generation and public visibility through electronic billboard, charging stations, campus store/farmers' market concept selling UC Davis products, and educational food venues or

- food-focused events to enhance experience of visitors to Mondavi Center and Manetti-Shrem Museum.
 - Develop a hotel and conference center space in Bodega Bay.
 - Develop a campground near Putah Creek.
 - Develop University affiliated retirement community.
 - Dramatically increase solar throughout campus.
 - Sell advertising in parking lots.
 - Renting out large classrooms as in-person testing centers
- It is noted that there can be significant barriers to these types of developments including the complexity of projects and/or partnerships, environmental impacts and review, Regental approvals, risk and safety concerns, level of investment needed, and length of time to return on investment.

Assessment of Programs and Activities to Sunset to Achieve Savings and Focus on Mission Alignment

- Establish an ongoing process to assess programs, activities, and executive/administrative positions for alignment to the university mission, return on investment, and alignment with campus goals that would result in a recommendation for elimination, continuation, or expansion.¹ The process would assist leadership in making strategic decisions as the campus' needs change.
 - The process should include a comprehensive assessment to understand funding sources, how funds are used, the number and type of positions supported, impact to university mission, and benefit/risk analysis.
 - Establish criteria for determining which programs should go through this assessment.
- Assess funding allocation models and financial incentives for strategic alignment with the mission.

Establish a Culture of Continuous Improvement

- Address the majority of ideas submitted, which were focused on efficiencies and process improvement, by supporting continuous improvement efforts campuswide. Examples of process improvement ideas submitted included: widescale implementation of DocuSign; improving the Vendor Risk Assessment Process; scheduling follow-up visits before patients leave clinician offices; and, reviewing the undergraduate curriculum requirements. Although, individually, most of these ideas will not have a large measurable financial impact, collectively they could result in reduced workload, improved customer/client/student/employee experiences, and overall significant campus savings. The following approaches could support this effort.

¹ This refers to all types of “programs” that exist on campus. Review processes are already in place for certain types of programs, like degree programs and organized research units; however, many other “programs” are not reviewed and evaluated on a regular basis.

- Identify projects from this group of ideas for future cohorts of the Lean Six Sigma Green Belt program.
- Promoting an environment and culture that values and supports efforts at continuous improvement by providing leadership sponsorship to:
 - Maintain an ongoing process for submitting, reviewing, and implementing improvement ideas from the UC Davis community.
 - Maintain and invest in growing process improvement expertise across campus through Lean Six Sigma training, community of practice, and expertise such as that found in the Office of Business Transformation.
 - Encourage the review and revision of administrative processes to leverage consistency, reduced touchpoints, and automation where possible.
 - Communicate regularly with the campus about continuous improvement, for example by featuring updates in Dateline and developing and promoting dashboards that track improvements.
 - Develop an award program for individuals who generate ideas that result in cost savings, process improvement, and/or efficiencies.
- Direct each Dean and Vice Chancellor to identify 2-5 process improvements annually (using suggestions from the ideas submitted to this process in 2023-24) to work on within their unit over the next year and report back on outcomes.

Quick Wins

- Assign a champion to be responsible to quickly implement the most promising ideas the Task Force identified as “quick wins” that could be accomplished in a short timeframe and with limited effort, investment, or oversight needed, and which were highly rated in terms of the experience for the community and financial impact.

NEXT STEPS

As indicated in the charge letter, we understand that any recommendations endorsed by campus leadership will move to an implementation phase. Projects identified for implementation may also receive limited-term investment. During the implementation phase, it is critical that there is strong oversight to ensure that projects are moving forward in a timely fashion, there is regular reporting on status, barriers are addressed, and if the effort seems unlikely to be successful, the implementation effort is discontinued. We suggest that an oversight committee or champion be designated for each project chosen to move forward so that there is clear accountability for overseeing the project.

In addition, we recommend that a communication plan be developed to share the outcome of the task force work, decisions about project implementation, and status of projects underway. Continuing to engage and inform the campus community about efforts to increase revenue and identify savings and efficiencies will support change adoption and a culture of continuous improvement.

ACKNOWLEDGMENTS

Finally, the task force would like to thank the staff who were instrumental in supporting the work of the task force and ensuring that this effort was thorough, thoughtful, and completed on time: Christine Herkenrath (Budget and Institutional Analysis), Elisabeth Willoughby (Budget and Institutional Analysis), Bernadette Hill (Business Transformation), Jennifer Eting (Finance, Operations, and Administration (FOA) Communications), and Desirae Webb (FOA Vice Chancellor's Office). Thank you also to the UC Davis Stores, Mondavi Center, and University Credit Union for providing prizes to encourage participation in the IDEA\$ at Work Campaign. In addition, because we met our goal of 1,000 ideas submitted through both the IDEA\$ at Work Campaign and the Customer Satisfaction Survey, we also donated \$2,000 each to the Pantry, the Davis Staff Emergency Fund, and the UC Davis Health Staff Emergency Fund.

APPENDICES

Appendix I – Charge Letter

Appendix II – Committee Membership

Appendix III – Process and Timeline

Appendix IV – Statistics

Appendix V – Idea Category Lists

Appendix VI – Evaluation Tools

Appendix I – Charge Letter

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May 25, 2022

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CHIEF STRATEGY OFFICER RON AMODEO
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School of Veterinary Medicine

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College of Biological Sciences

RE: Revenue Generation and Institutional Savings Task Force Charge

May 25, 2022

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ASSOC. ATHLETICS DIRECTOR DANIELLE SHANK

Intercollegiate Athletics

PROFESSOR GAIL TAYLOR

College of Agricultural and Environmental Sciences

CHIEF ADMIN. OFFICER KATE TWEDDALE

College of Letters and Science

ASST. VICE CHANCELLOR AMY SKEHAN

Development and Alumni Relations

RE: Revenue Generation and Institutional Savings Task Force Charge

Dear Colleagues,

I am writing to request your participation on the Revenue Generation and Institutional Savings Task Force. As indicated in the [2022-23 Budget Framework](#) communication earlier this year, although our core fund projections have begun to stabilize, we must continue to identify efficiencies and opportunities to generate net revenue for long-term financial sustainability. A core fund operating deficit of approximately \$20 million remains. For true sustainability, the campus needs to not only address this deficit but identify additional resources to invest in critical priorities and weather future core funding challenges. This cannot be achieved only through local actions within campus units, but requires an overarching review of where there are significant net revenue-generating opportunities and the potential to reduce costs through changed practices. I am setting a goal that the Task Force identify opportunities that would result in at least \$50 million in ongoing net revenue and/or savings that can be applied to the campus core mission within 3-7 years. Toward this end, the Task Force is charged to:

- Identify ideas for how UC Davis can increase net revenue generation or achieve institutional savings. Ideas should be gathered through broad campus outreach as well as research on opportunities or approaches in higher education generally.
- Assist in reviewing and analyzing the ideas gathered in a systematic way to identify the most promising opportunities for the campus to pursue. I expect this analysis to be rigorous and that deliverables include at least some of the following, depending on the idea:
 - Description of the opportunity and why it is right for UC Davis.
 - Identification of pros, cons, and barriers to implementation.
 - Assessment of risk vs. opportunity.
 - Market analysis.
 - Detailed multi-year business plans.
 - Assessment of difficulty to implement and achieve target net revenue or savings.
 - Identification of ideal collaborators to support the opportunity.
- Recommend specific actionable net revenue generating opportunities that are

sustainable for ongoing financial impact, can support the core mission, and are compatible with the strategic plan and campus values.

- Recommend ideas that could result in significant savings through efficiencies, changed practices, and/or leveraging all funds to better support our mission.
- If identified, recommend ideas that would result in significant one-time net revenue or savings.
- Identify barriers or challenges to revenue generation or achieving savings, especially those that involve university practices, policies, or structures.

This Task Force will work through the 2022-23 academic year, with recommendations provided no later than June 2023. There will be dedicated staff support provided for this effort, however Task Force members are expected to be significantly engaged in the work and outcomes. I will use your recommendations to inform leadership endorsement of specific ideas that will move to an implementation phase and potential investment in implementing the most promising opportunities. It is my hope that this effort will be the first step in establishing an ongoing process and culture around continually identifying and implementing opportunities that will allow us to ensure that resources are used to best advance our mission and invest in critical priorities and new opportunities.

Thank you for your willingness to serve UC Davis in this important effort. If you have any questions about the charge or level of commitment, please reach out to Sarah Mangum at semangum@ucdavis.edu.

All the best,

A handwritten signature in cursive script that reads "Mary Croughan".

Mary Croughan
Provost and Executive Vice Chancellor

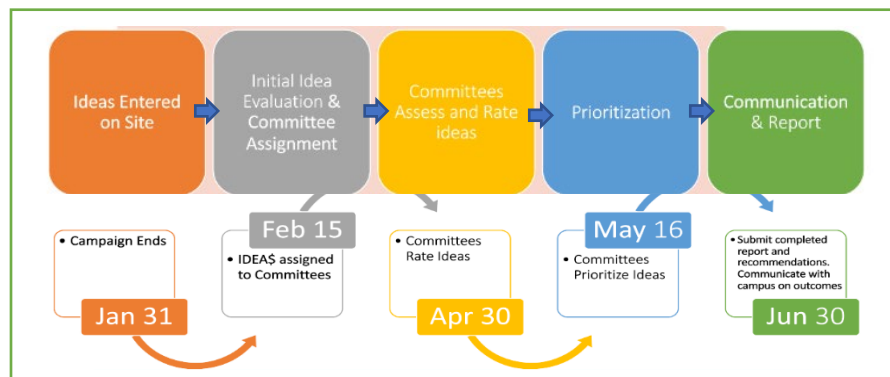
Appendix II – Idea Review Committee Membership

The Revenue Generation and Institutional Savings Task Force was comprised of members from a variety of disciplines, with a mix of faculty and staff. Committee membership, for purposes of reviewing the ideas submitted, was determined based on expertise of committee members as well as some need to balance committee numbers. Each committee was responsible for fully evaluating each single idea, identifying themes, and reporting out insights uncovered during their analysis. Each Committee was led by a Chair (designated in italics and bold below) and was supported by a Task Force staff member, who assisted each committee by helping with process, gathering information, research, and meeting facilitation.

REVENUE GENERATION & INSTITUTIONAL SAVINGS TASK FORCE COMMITTEE MEMBERSHIP

Committee Group	Members*
<i>Education, Academia, and Academic Administration</i>	<i>Durias Bonite, Jasmine</i> Aldredge, Ralph Curtis Badovinac, Lisa M Lynch, Sean Michael Marx, John
<i>Engaging the Public, Goods, Other</i>	<i>Hunter, Heather L</i> Mangum, Sarah Shank, Danielle Skehan, Amy R
<i>Facilities & Plant, Sustainability</i>	<i>Mazet, Jonna</i> Roeser, Elissa J Roth, Don Taylor, Gail
<i>Financial Services</i>	<i>Sang, Jennifer</i> Kingston, Kaylie Russ, Katheryn Willoughby, Elisabeth
<i>Human Resources</i>	<i>McNally, Mary</i> Lorgan, Jason Miller, Lee M Tweddale, Kate
<i>Information Technology, Services, Clinical Programs, Program Evaluations</i>	<i>Prabhu, Radhika</i> Amodeo, Ronald Aravindakshan, Ashwin Cooke, David T
<i>Research Administration & Innovation</i>	<i>Ehlen, Denise</i> Block, David E Davis, Cristina Lucero, Steven Andrew
Task Force Administrative Support	
Christine Herkenrath Elisabeth Willoughby Bernadette Hill	

Appendix III – Process and Timeline



Initially, task force members were provided an overview of the campus budget and the task force charge. The IDEA\$ at Work campaign, a strategy for gathering ideas from the campus, was the first outcome. The task force formed two separate committees to initiate the task force work, the Survey Design and Communication Strategy Committee and the Higher Education Ideas in Research Committee.

The Survey Design and Communication Strategy Committee was charged with designing a [campuswide survey tool/website](#) to collect ideas and plan campaign communication strategies. This committee ensured that the survey reached a broad campus constituency, collecting ideas from students, staff, and faculty, and that broad and appropriate communication channels reached out to the campus community.

The committee also worked with the UC Davis Graduate School of Management Impact Team to design an idea rating tool that would be used by task force members to analyze ideas. They worked with the Finance, Operations, and Administration Communications team on the creation of the website, idea collection tool, communication tool kit, and supporting the outreach effort to inform the campus community about the task force and opportunity to submit ideas. Finally, the committee elected to add a link to the annual Customer Satisfaction Survey to solicit additional ideas from campus constituents.

The Higher Education Ideas in Research Committee was charged with research and review of similar efforts and opportunities that have been pursued at other higher education institutions. Members met over several months to discuss findings and document opportunities that may benefit the campus. In addition, this committee provided valuable feedback as a pilot group for the idea rating tool.

Task force meetings:

- June 16th - Initial meeting - Overview of campus budget, task force charge and proposed approach to idea gathering

- September 23rd - Committee Retreat – Committee update and round-table brainstorming activities.
- October 28th - Communication & Higher Education Research committee reports, MBA Impact Team Presentation and discussion
- February 8th - Overview of results, review process and next steps.
- Idea Review Committee meetings – February through May 2023
- May 16th - Task force retreat to discuss prioritization results and recommendations.
- June 8th - Final task force meeting to discuss draft report.

Higher Education in Research Committee Meetings:

- September 12th - Initial meeting to discuss goals, planning, focus areas and information gathering.
- October 10th - Meeting to discuss progress and have a discussion of ideas submitted by the task force and this committee.
- October 24th - Continued discussion of ideas.
- November 21st - Meeting to preview and discuss the assessment tool created by the MBA Impact team.
- November 29th - Demo of final assessment tool.

Survey Design and Communication Strategy Committee Meetings:

- July 25th - Initial meeting to review survey and communications requirements.
- September 20th - Follow-up meeting to review survey design and communications strategy.

Presentations were made by task force members to a large range of constituent groups, informing them about the task force and IDEA\$ at Work campaign. Groups included:

- Student Affairs Leadership Team
- Supply Chain Management Team
- UC Davis Insider Website
- School of Nursing Leadership and Faculty
- School of Medicine's Office of Medical Education and Dean's Office
- Senate Committee on Planning and Budget
- Finance, Operations, and Administration All-Staff and Senior Leadership Meetings
- Budget and Institutional Analysis Assistant Dean/Chief Operations Officers Meeting
- College of Letters and Science Chief Administrative Officers
- Administrative Management Group
- Mondavi Center Career Staff
- Chief Information Officer Strategic Advisory Council

- University of California – Davis Health Division Staff Assembly Executive leadership Team

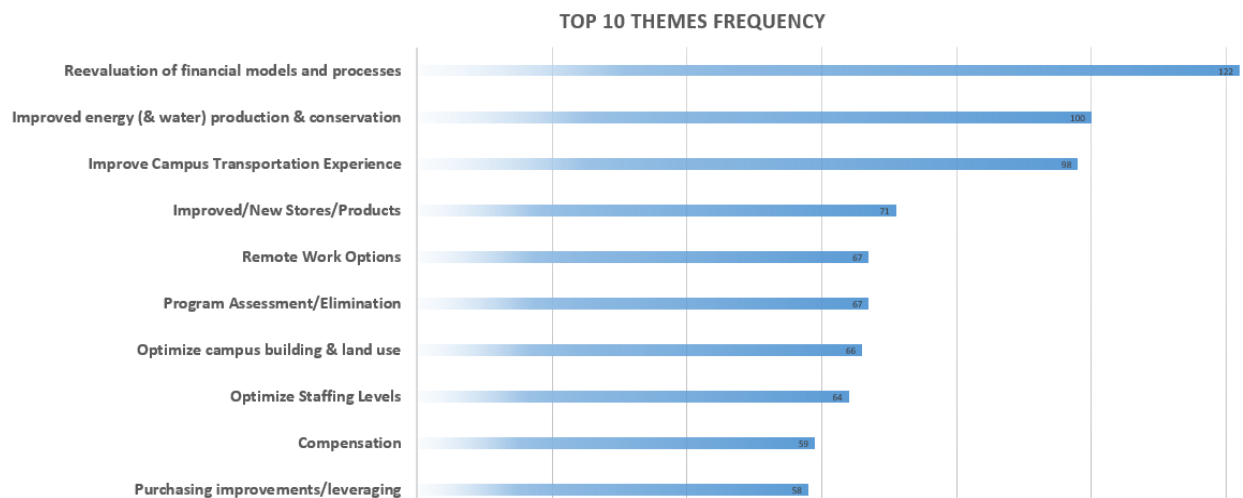
Further outreach included

- Staff Voice Newsletter
- Faculty Senate listserv
- Dateline
- Insider Wednesday Update
- Aggie Enterprise Change Network Newsletter
- The Spreadsheet
- Supply Chain Link
- Student Affairs Connect
- Finance, Operations, and Administration Digest
- Checking in With Chancellor May

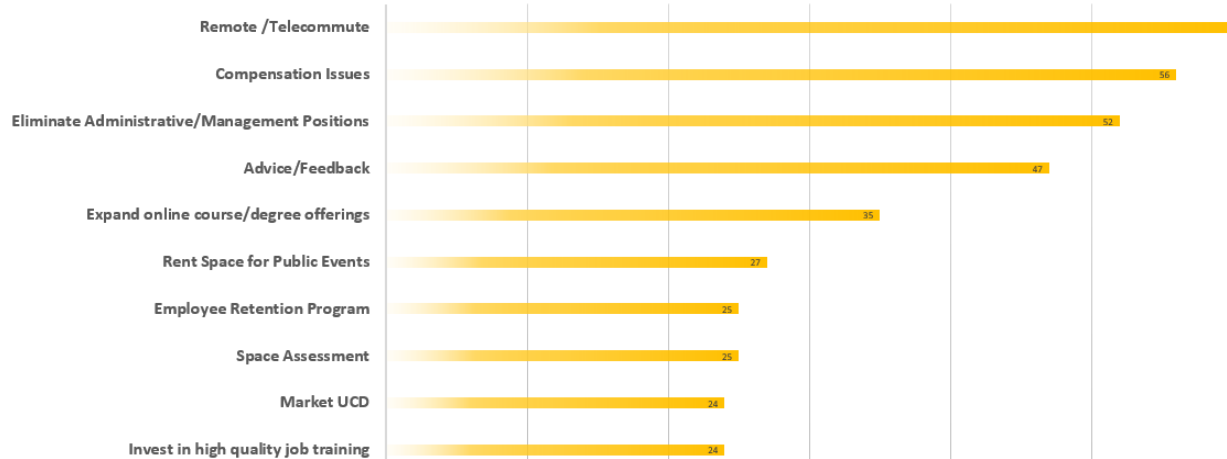
Appendix IV – Ideas Statistics

Idea Submissions

<i>IDEAS Summary</i>		
Breakdown	Number	Percent
Total Ideas	1958	100%
Cost Savings	1145	58%
Revenue Generation	753	38%
Cost Savings+Rev Gen	60	3%

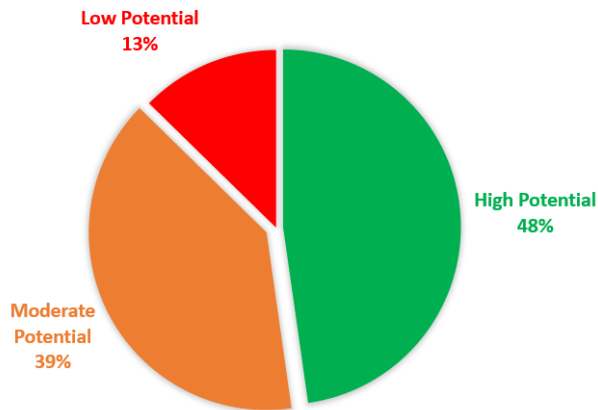


TOP 10 IDEAS SUBMITTED MULTIPLE TIMES BY TOPIC



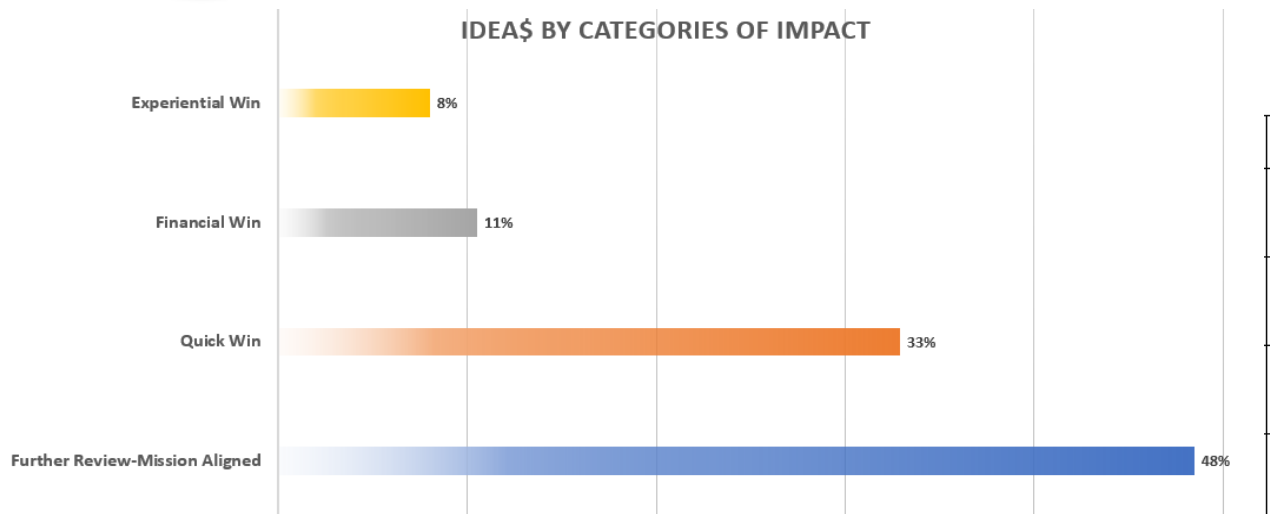
Outcome of Idea Evaluation by Task Force Committees

IDEA\$ BREAKDOWN -
BY CATEGORIES OF POTENTIAL



IDEA\$ Potential	
Potential	Definition
High Potential	Priority Score ≥ 3 and Links to Mission
Moderate Potential	Priority Score of between 2 - 2.9 and links to Mission
Low Potential	Priority Score < 2 or ideas that don't link to Mission

IDEA\$ BY CATEGORIES OF IMPACT



Appendix V – Idea Category Lists

Below are links to lists of ideas in the following categories as rated by the task force committees. These lists could be used to move forward with specific actions in units, as part of a Lean Six Sigma project, or directed by leadership to achieve a quick win. In addition, they provide additional insight and examples of the range of ideas submitted to this process by the campus community.

[High Potential Ideas List \(Unique\)](#)

[Quick Win Ideas List \(Unique\)](#)

[Financial Win Ideas List \(Unique\)](#)

[Experiential Win Ideas List \(Unique\)](#)

[Further Review for Unit or Dept Leaders List \(Unique Ideas\)](#)

[Continuous Improvement Specific List \(Unique Ideas\)](#)

Appendix VI – Evaluation Tools

The Task Force used evaluation tools to collect ideas, rate them, and then prioritize them. As ideas were generated through the IDEA\$ at Work website, the Task Force Staff downloaded the ideas into a database for evaluation by expert committees. Every committee member was trained on a standard process to review, evaluate, and rate the ideas given to their committee for review.

Input and Output forms

Intake Form (From Task Force)

Share your ideas! Unless you choose to share your email, ideas will remain anonymous.

• **Revenue Generation:**

Can we contact you to learn more about your idea? If so, please share your email address (optional):

Submit

How can we let it up so that they can submit another idea? I imagine something where there is a question that says "Do you have another idea to share?" and then there is a "Click here" option that opens up another idea box. Is this possible in the form format?

• **Savings and Efficiencies:**

Output Generated

ID No.	Title/Category	Idea Description	Additional Notes/Info
1.4 Savings and Efficiencies	Monitoring administrative expenses for faculty	See also academic personnel process. Without this step, administrative costs faculty only rate for administrative.	Consider not to be used for student fees
1.5 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
1.6 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
1.7 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
1.8 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
1.9 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
2.0 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
2.1 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
2.2 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
2.3 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees
2.4 Savings and Efficiencies	Academic record for academic administrative	Academic record for academic administrative	Consider not to be used for student fees

- Output of ideas is triaged by the Task Force & sent to committees for initial evaluation
- Viable ideas are inputted into Assessment Tool
- Vague/unclear ideas are sent to one central person who can follow up with idea generator if email address is provided.

Committee Review Process Standard Work

Standard Work Committee IDEA\$ Entry

Prepared By: Bernadette Hill

Approved By: _____

Original Issue Date: _____

Revision Date: _____

Purpose:

The purpose of this document is to provide guidance to the Committees in support of their efforts to substantiate IDEA\$ for entry into the Cost Savings Assessment Tool and later prioritize them.

STEP NO.	WHO	TASK DESCRIPTION	TOOLS/SUPPLIES REQUIRED	CYCLE TIME	VISUALS
1.	Task Force Staff	Prepares the IDEA\$ data for Committees	Excel		
2.	Committee	Downloads the IDEA\$ Report from Box 1) Committee Reports 2) IDEA\$ Assessment Questions	Box Permissions Excel	1 min	

i) Column T: Rate how closely the idea aligns with UC Davis's Mission of Teaching, Research, and Public Service.
b) Columns W-AA: Rate each dimension based on group consensus
c) Column AB: Review resulting weighted score

a) Columns T-V: Input appropriate choices based on group consensus
i) Column T: Rate how closely the idea aligns with UC Davis's Mission of Teaching, Research, and Public Service.
b) Columns W-AA: Rate each dimension based on group consensus
c) Column AB: Review resulting weighted score See next step if research requires additional expertise outside of the committee

1) If ideas can't be substantiated by any means, enter idea into Assessment tool, check "vague ideas" box so vague ideas can be included for prioritization

Committee Research and Entry process ends; Prioritization process begins.

Flowchart:

```

graph TD
    Start([Start]) --> Step1[Step 1: Committee Staff Prepares IDEA$ data for Committees]
    Step1 --> Step2[Step 2: Committee Downloads IDEA$ Report from Box]
    Step2 --> Decision1{Is idea substantiated?}
    Decision1 -- No --> Vague[Enter idea into Assessment tool, check "vague ideas" box]
    Decision1 -- Yes --> Step3[Step 3: Committee Rates IDEA$]
    Step3 --> Decision2{Is idea substantiated?}
    Decision2 -- No --> Vague
    Decision2 -- Yes --> Step4[Step 4: Committee Research and Entry process ends; Prioritization process begins.]
    
```

Flowchart:

```

graph TD
    Start([Start]) --> Step1[Step 1: Committee Staff Prepares IDEA$ data for Committees]
    Step1 --> Step2[Step 2: Committee Downloads IDEA$ Report from Box]
    Step2 --> Decision1{Is idea substantiated?}
    Decision1 -- No --> Vague[Enter idea into Assessment tool, check "vague ideas" box]
    Decision1 -- Yes --> Step3[Step 3: Committee Rates IDEA$]
    Step3 --> Decision2{Is idea substantiated?}
    Decision2 -- No --> Vague
    Decision2 -- Yes --> Step4[Step 4: Committee Research and Entry process ends; Prioritization process begins.]
    
```