



CASE STUDY

UCSD BUSINESS AND FINANCIAL SERVICES (BFS)

Business & Financial Services (BFS) is the department at UC San Diego with oversight of the major business operations for the entire campus. It is comprised of three value-streams: Compliance and Internal Controls, Front Line Operations, and Business Transformation & Optimization. The department provides leadership, consultation, promotion, accountability, encouragement, and expertise in building and maintaining an effective control environment and ensures legal and ethical stewardship for university resources. Many programs and initiatives to ensure such an environment are developed and deployed from this office. There are nearly 300 career employees located in six different facilities that comprise BFS.

The 4-year STRIVE Leadership Program originated in BFS in 2006, when it was estimated that over 40% of current employees were eligible to retire within the next 5 years. The development of STRIVE was a response to the ever-increasing need to address retention and succession, to target the development of leaders, and to ensure institutional knowledge was retained. BFS planned to proactively grow an interconnected cadre of leadership, to foster a diverse and integrated group of motivated, invested and empowered employees eager to assume leadership roles. Moreover, it was crucial to address the future of the university with a broad perspective and shared toolbox of knowledge and skills in order to bridge the silos existing on campus and lay the framework for the next generation of leaders. The in-house program ran for 10 years and was limited to employees from BFS. Three years ago, BFS doubled the size of the program and opened it up to the rest of the campus and with goals intact, called it the UC San Diego STRIVE Leadership Program.

In 2015 BSF decided the program would benefit from the creation of a "core curriculum" comprised of the following 3-day courses addressing four main goals and providing a shared framework for leadership and a common toolbox of terminology, skills, and methodologies.

GOAL 1 - Customer Service Excellence (Year 1) – Disney Quality Service Institute (outfacing)

GOAL 2 - Leadership Excellence (Year 2) – The Leadership Excellence Course (chosen for its strength in enabling participants to understand themselves and identify their own personal philosophy of leadership, articulate it, and develop strategies to stay true to it, particularly as challenges of leadership arise)

GOAL 3 - Internal Centering Strategy (Year 3) – Mindfulness Institute (inward facing)

GOAL 4 - Change Management Methodology (Year 4) – Prosci Certification (methodology/skills)

In 2016, during the discussion of a curriculum for the STRIVE program, Janine Tarkow, Director of STRIVE, attended a short workshop at a PMP conference held in San Diego that introduced Academy Leadership. The instructor was inspiring and Janine left incredibly excited and motivated to find a way to send a pilot group to a full 3-day course. She did more research on Academy Leadership's website and found the closest course to be in Seattle, led and facilitated by Jay Pullins. After talking with Jay, Janine sent a group of four employees who returned inspired and recommended the full course as a core curriculum choice for STRIVE and that every employee should complete the Energize2Lead™ Profile Assessment Workshop.

UC San Diego

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BFS continues to send cohorts of STRIVE participants to Academy Leadership / Jay's in-house Leadership Excellence Course (LEC) each year, and the testimonials give incredibly high praise to the content and value of the experience. The LEC has many modules but the two that BFS has found to be at the apex are:

- 1. The Energize2Lead™ (E2L) Workshop:** This 3 hour workshop provides an insightful and easy to use personal profile that identifies personal styles and their impact on work relationships and team dynamics. Participants learn how to interpret results and to communicate and collaborate more effectively.
- 2. Personal Leadership Philosophy (PLP):** Requires you to clearly understand and articulate who you are as a leader – your values, expectations of self and others – how you can implement and stay true to that vision.

But BFS hasn't stopped there. They have leveraged this partnership that started with STRIVE into a multitude of leadership development opportunities:

2016-17

- In addition to making the LEC a core curriculum course for their 4-year program, they also sent their 14 STRIVE alumni through this course facilitated by Jay.
- The BFS Leadership Team, comprised of all Division/Unit Managers (14), participated in a one day intensive E2L Workshop in the morning and PLP in the afternoon.

2017-18

- All 245 BFS employees completed the E2L online profile and 3-hour workshop.
- The Annual BFS Supervisor/Work Leader Retreat (65) included a session of E2L activities.
- Linda Thai Schlossman, in her role as Assistant Director for STRIVE, completed the LEC with a STRIVE cohort. She leveraged BFS' Academy Leadership partnership to create a program for senior leadership in the Office and Divisions of the Executive Vice Chancellor of Academic Affairs.
- The Health Sciences Leadership Team completed the E2L profile and workshop (6).
- The UCPATH Core Project Team completed the E2L profile and workshop (24 employees from BFS, Academic Affairs, and Health Sciences).
- Other leaders from the Campus Budget Office and Health Sciences have indicated interest in having their employees complete the E2L profile and workshop.

2018-19

- BFS made a financial and philosophical commitment to the E2L online profile and workshop being a required part of new employee onboarding.
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Jay's flexibility and customer service are instrumental in allowing us to expand the program in different formats to many different groups on campus. Without this it would have been a one-time experience.

Jay incorporated a visual of a person's E2L profile represented via LEGO blocks and each participant gets their "LEGOs" during their attendance at the LEC or E2L Workshop. As those have proliferated around our offices and campus not only has the word spread about the program, but for people who have participated it is a reminder each time to think about it as they walk into a person's office or work space...about differences and how they can act in a way to encourage and enhance collaboration, rather than diminish it.

As LEC participants share their PLP with those around them they have reported valuable conversations, discussions and understanding as they learn to communicate more effectively and therefore improve both morale and productivity. Direct reports have said they feel more valued when this information is shared 1:1, not only in understanding their supervisor and that person's expectations better, but in having that moment of shared reflection, that in our busy world rarely seems to happen.

Leadership Excellence Course Testimonials

"You will come out of it energized, and you will learn so much about your style in only 3 days. At the end you will have written your Leadership Philosophy that you will use as a compass in your work life."

-Wella Garcia, Divisional Senior Accountant, BFS

"A self-awareness exercise that yields a tangible document/result. Good program for all levels of leadership."

-Jenn Glassman, Assistant Director, BFS-IPPS, Technology & Project Management

"I recommend the program without reservation not only because of the content but because of the quality of instruction provided by Jay Pullins. I appreciate his sincerity and expertise, and I am inspired from his teaching. You can tell right off the bat that he lives and breathes leadership. He is a great role model and the right instructor to lead this training."

-Linda Thai Schlossman, Principal HR Analyst, Office of the Exec. Vice Chancellor

"Intensive development program that allows you to develop and articulate a personal philosophy of leadership and integrate it into your daily living."

-Janine Tarkow, Director, BFS-Workforce Business Transformation & Optimization

"Life changing, eye opening and simple to implement."

-Leyhda Acol, Award Accountant, BFS-Post Award Financial Services

"A good investment of time and effort, with rich content (no fluff) and opportunities to learn, interact and practice. Delivered on my goals for participating in the session."

-Dawn McDevitt, Associate Director, BFS-IPPS



ACADEMY LEADERSHIP CASE STUDY

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