



July 11, 2011

Tampa, FL

CHALLENGE 2010 DEBRIEF SESSION

The University of Georgia

Lydia Lanier
Jason Parker
Travis Jackson



The University of Georgia (UGA)

- Public, four-year university located in Athens, GA.
- Incorporated by an act of the General Assembly on January 27, 1785
- Georgia became the first state to charter a state-supported university
- 2011 Fall student enrollment will exceed 35,000
- 10,000 benefit eligible faculty and staff, 6,000 temporary employees and 5,000 retirees plus 4,000 students mandated in health insurance



Institutional Profile



- UGA Human Resources has 34 employees
- Smallest HR among peer institutions
- Ratio – 1 : 294
- Financial Management & Education Center (14) ratio – 1 : 1785



PROJECT DESCRIPTION/SUMMARY



Project Summary



- Provide our benefit eligible faculty and staff with a new and innovative service to assist them with their financial life management throughout their careers
- Financial awareness/stability
- 360 Personal Financial Consultation (360PFC) – define, implement and assess

- Internal HR initiative
- Changing HR from paper to people model
- Financial life management missing – currently reactive to calls, inquiries
- Current HR model can be outsourced

- Provide a comprehensive personal financial consultation (306PFC) – flexible and relevant to needs
- Complete our first 1000 consultations in the first 18 months (by December 31, 2011)
- Survey results ratings are averaging 8 of 10 or higher

- Used the worksheets from last year as a foundation for all of our work
- Philosophy of change
 - ✓ Always expect the unexpected resistance and then adapt your plan
 - ✓ Communication (or the lack of it) may strengthen your chances of success
 - ✓ Guarantee your successes in the beginning
- Data Analysis and more data analysis

- The number of consultations has progressed slowly until just recently (April) – we reached a turning point
- By the end of March 2012, we should be over 1000 consultations
- Survey is working well – 73% return rate and 8.72 (of 10 highest) approval rating

- New Strategy – Cold calls start in July in three large areas of campus we have already reached out to March
- Rethinking – the Quad educational strategy
- Need to look at expanding our Sr. Executive consultants to three and revisit our focus on new hires



PROJECT ANALYSIS

- Surveys will not create or send themselves
- Data will not analyze itself
- Always expect a new twist – “You can’t come in here dressed like that!”
- Data still won’t analyze itself
- Create an open, non-threatening environment for ideas
- Team members and their commitment and knowledge can make a project/process successful
- Data analysis is important

When you are making a significant change, Baldrige/EHE model can...

- Build a foundation for your process and/or project
- Give you a balanced framework – good and bad characteristics of change
- Stress the importance of data analysis
- Influence the way you approach communication

As the **New Normal** arrives, isn't it time to take the traditional, conventional, conforming, and usual HR to the landfill?

