

# F & O Unit Review Process - Revised 2008

## I. Unit Self Assessment

The unit leader completes a Self Assessment template that is a thorough review of the unit. The assessment would gather comparative data required for all F & O unit reviews. If applicable, collect business specific data for benchmarking with similar units in the CIC and other academic institutions.

Basic information components outlined in the self assessment template would be:

- o Organizational Environment
- o Organizational Relationships
- o Competitive Environment
- o Strategic context
- o Performance Improvement System
- o Specific business operational data, if applicable

The unit leader would be asked to determine a list of the top five issues facing the unit.

## II. Considerations to Determine Which Strategy to Employ for Improvement

Based on the information in the self-assessment, the unit leader, in concert with their Director, would then decide what evaluation track to take.

If the self-assessment indicates that a particular process is severely hampering a segment of their operation and needs a deep examination and overhaul, the unit leadership might decide to sponsor a Lean event. If the unit leadership is looking for a new perspective on all aspects of their operation, a more general intern/external review might be more value-added. This decision should take into consideration the cost/benefit of having a broad vs. narrow focus for improvement.

A brief statement will be required to explain the rationale for the decision.

### III.A. Lean Event

A Lean event lasting up to 3 days would be organized to review the selected business process. The event would be conducted using the standard Lean methodology

### III.B. Internal/External Unit Review

This would be a more general review. It could be utilized to meet accreditation, regulatory, or certification requirements. It would be an on-site visit of a committee composed of both on-campus, but external to the unit and external members as applicable. The actual event will be ~ 3 days. The committee would review the self-assessment information and offer an independent assessment. It would then disclose the results in a separate report.

### IV.A. Lean Event Report Out, Implementation, and Follow up by Unit Leader

The Lean event report would use the same format as all other Lean event reports.

### IV.B. Internal/External Unit Review Report Out, Implementation, and Follow up by Unit Leader

The self-assessment information gathered in the template format will serve as the unit self report.

The independent review committee report should be in a format that includes these major components:

- o Identity of the unit
- o Strengths/Best Practices
- o Opportunities for improvement
- o Recommendations
- o Comments and/or Observations