

## Real Estate Office Strategic Plan 2015

**A. Current unit plans** (this section is OPTIONAL): Please provide the URL for any current unit plans already in existence. NA.

**B. Unit mission/vision statement:** Please provide your current unit mission/vision statement. If your unit has multiple departments with differing mission/vision statements, list them as well.

Real Estate Office (REO) mission statement:

- The UCSC Real Estate Office exists to advise and serve the campus.

Real Estate Office (REO) vision/objectives:

- The Real Estate Office provides objective guidance regarding the role of real estate assets in meeting campus space and facility needs. REO facilitates cooperation among campus units to ensure that real estate solutions are implemented in an efficient manner.

**C. Adaptive organizations:** Identify actions your unit will take in 2015-16 to advance the five characteristics of adaptive organizations (Heifetz and Linsky): 1. Elephants in the room are named 2. Responsibility for the organization's future is shared 3. Independent judgment is expected 4. Leadership capacity is developed 5. Reflection and continuous learning are institutionalized.

1. Elephants in the room are named:

- What are the difficult issues that others at UCSC discuss when they are talking about REO? In 2015-16, as REO is undergoing an organizational shift, we need to find non-threatening opportunities to talk to our colleagues about these issues in an open and non-defensive way:
  - Are our approaches burdensome and time consuming?
  - Do we create processes that ensure our reason to exist?
  - Are we too pushy and unaware of the constraints on our colleagues?
  - What isn't working about what we do or how we do it?
- At the same time, over the course of 2015-16, REO needs to find effective ways to articulate the difficult issues we encounter in the campus as an organization and their impact on our activities:
  - Inefficiencies in decision-making.
  - Risk aversion.
  - Making future decisions based on avoidance of risks/problems with past experiences.
  - Protection of processes and/or turf rather than seeking the best way to solve problems.
  - How to provide public-facing service in an environment that is increasingly emotionally charged.

2. Responsibility for the organization's future is shared:
  - Internally, REO remains small and highly collaborative, with a matrix approach to staffing individual projects. This approach helps everyone in the organization stay engaged with tasks. The pending reorganization of REO gives us an opportunity to engage all our staff in building the new form of the organization. In the context of BAS and the campus organization, REO staff want to stay involved in BAS transformation teams, and share the information they learn in those contexts. A new endeavor that would benefit REO in the context of the larger organization is more cross-training and on-going collaboration: REO has long wanted to have our Project Manager cross-trained to be certified by PP&C as a Project Manager for TI projects; and our Financial Analyst needs to be deeply familiar with the operations and methods of both Financial Affairs and Planning and Budget.
3. Independent judgement is expected:
  - As REO reorganizes, we anticipate greater differentiation among our primary services of facilities management and real estate transactions. We will re-evaluate our delegations to ensure that formal authority will be delegated to the lowest level of functional responsibility. We will also work on improving our internal communication such that we make sure that solutions to problems are stemming primarily from the staff that are addressing them, with support and input from others on the team. Finally, we will work with campus leadership to re-evaluate the levels of concurrence and approval required for different levels of REO projects, including the question of whether the campus is served by requiring multiple sign-offs under different delegations for the real estate and capital components of real estate transactions.
4. Leadership capacity is developed:
  - Performance evaluation in REO is already focused primarily on opportunities for professional development. Because REO's function is highly facilitative, all staff are encouraged to develop and practice facilitation skills, including striving to work to understand the needs and drivers for the units we serve and with whom we collaborate, in order to better advise and lead in our respective areas and projects. Leadership with respect to diversity is encouraged, including both training in diversity issues and a willingness to engage in an on-going dialog about current diversity policies and standards as they apply to public-facing units like REO.
5. Reflection and continuous learning are institutionalized:
  - Internally, REO will continue periodic all-staff meetings to discuss our operations and any changes we would like to undertake. These may be in response to our own simplification and efficiency activities, or in response to client feedback. In addition, REO will continue to experiment with business case analysis as a means of objectively assessing the lessons learned from major

projects. During 2015-16, REO will seek support and input on developing methods of assessing client satisfaction and suggestions, in some form of organizational “360” assessments for our various projects.

**D. Unit strategies and year one actions:** For each of the four BAS goal areas, identify strategies (that will span the entirety of the strategic plan timeframe) and year one actions that your unit will undertake. Ensure you review the BAS strategies and year one actions to avoid duplication or the creation of conflicting efforts.

1. Finances (advances campus goals 1,5) - Deploy and manage BAS resources to align with institutional goals

Real Estate Strategies – Finances:

- Articulate real estate financial principles in campus decision-making.
- Evaluate current and alternative funding models for REO activities.
- Adopt BAS common set of principles and objectives for managers and supervisors to deploy and manage resources and communicate throughout units.
- Participate in BAS development of infrastructure to support transparent and timely financial information, and maintain or develop coordinated infrastructure that addresses REO’s needs.
- Identify and employ efficiencies, best practices and standardization.

Real Estate Year One Actions – Finances:

- Develop REO financial principles in concert with BAS development of financial principles.
- Create REO process maps of financial activities and benchmark to best practices.
- Work with ORM and Planning and Budget to adopt a long-term carryforward management plan.
- Evaluate lease administration software, including alternative campuswide facilities software, to support timely financial information and project management.

2. Learning and development (advances campus goals 4,6,5) - Ensure that BAS team members have the opportunity for engagement, advancement and fulfillment

Real Estate Strategies – Learning and development:

- Establish succession plan and ongoing organization with the objective of ensuring career progression opportunities.
- Encourage individual professional development and leadership training.
- Encourage participation in BAS-wide and campus-wide workgroups, committees, and teams.
- Celebrate REO successes.

Real Estate Year One Actions – Learning and development:

- Re-write job descriptions and adopt new organizational chart.
- Orient new hires, if any.
- Fund training opportunities.
- Plan and implement opportunities to celebrate project milestones.

3. Constituents (advances campus goals 3,2,5,6) - Collaborate with stakeholders to ensure alignment of BAS activities with efforts to support teaching, research and public service

Real Estate Strategies – Constituents:

- Develop comprehensive communication and outreach plans for stakeholder engagement.
- Develop a comprehensive and coherent measurement and assessment plan.
- Hold post-project meetings to discuss how things went and how REO might better approach such projects in the future.

Real Estate Year One Actions – Constituents:

- Develop an REO stakeholder map.
- Seek support and input on developing methods of assessing client satisfaction and suggestions, in some form of organizational “360” assessments for our various projects.

4. Processes (advance campus goals 4,5,6) - Ensure BAS processes are transparent, efficient and effective

Real Estate Strategies – Processes:

- Implement real estate best practices from other UC campuses and from industry.
- Improve or eliminate inefficient and duplicative processes.
- Develop a comprehensive feedback and ‘lessons learned’ process.

Real Estate Year One Actions – Processes:

- Evaluate best practices related to implementation of tenant/building improvements in real estate transactions.
- Simplify and improve processes and training associated with event permits as part of the effort to delegate authority to units that currently rent campus facilities for events.
- Simplify and improve concurrence process for different levels of real estate projects and address duplicative processes for real estate projects that have capital project characteristics.

**E. Success measures:** Please identify success measures that your unit will utilize to track progress on unit plans.

Real Estate Success measures:

- Number of processes that have been simplified and estimated number of affected transactions.
- Development of a stakeholder map, completion of an organizational 360 assessment tool, and first implementation.
- Adoption of new job descriptions, organizational chart, and reclassification of affected staff.
- Hours of skills training that staff consider to have been worthwhile.
- Annual review of the fiscal condition of REO and MBEST showing improvement.